

L A F C O M E M O R A N D U M

SANTA BARBARA LOCAL AGENCY FORMATION COMMISSION
105 East Anapamu Street ♦ Santa Barbara CA 93101 ♦ (805) 568-3391 ♦ Fax (805) 568-2249

May 2, 2019 (Agenda)

TO: Each Member of the Commission

FROM: Paul Hood *PH*
Executive Officer

SUBJECT: **Report on 2019 CALAFCO Staff Workshop**

This is an Informational Report. No Action is Necessary

The 2019 CALAFCO Staff Workshop was held in San Jose on April 10-12, 2019. The Executive Officer and Legal Counsel attended the Workshop and will report back to the Commission at the May 2, 2019 meeting. Copies of the Staff Workshop Program and Mobile Workshop Flier are attached as **Exhibits A and B**.

EXHIBIT

Exhibit A 2019 CALAFCO Staff Workshop Program
Exhibit B 2019 Mobile Workshop Flier

Please contact the LAFCO office if you have any questions.

April 10-12, 2019

CALAFCO

— Staff Workshop —



Holiday Inn Silicon Valley

San Jose, CA

Hosted by Santa Clara LAFCo



WWW.CALAFCO.ORG

EXHIBIT A

2019 Staff Workshop Schedule At-a-Glance

WEDNESDAY, APRIL 10

- 7:45 am** MOBILE WORKSHOP
- 1:30 pm** WORKSHOP OPENING – Welcoming remarks
- 2:00 pm** GENERAL SESSION
MSRs: Tools and determinations – What will stand legal scrutiny and the test of time?
- 3:15 pm** REFRESHMENT BREAK
- 3:30 pm** ROUNDTABLES
- 5:30 pm** RECEPTION: Bounty of Your County
- 7:00 pm** DINNER (On your own)

THURSDAY, APRIL 11

- 7:30 am** CONTINENTAL BREAKFAST BUFFET
- 9:00 am** BREAKOUT SESSIONS
- Information Exchange and Knowledge Support of the 21st Century—Clerks Style
 - CKH: Reading between the lines
 - Making GIS work for the LAFCo layperson
- 10:30 am** REFRESHMENT BREAK
- 10:45 am** BREAKOUT SESSIONS
- Clerk certification - To be or not to be? That is the question
 - CEQA 201
 - Succession planning: Is your LAFCo prepared for the Silver Tsunami?
- 12:30 pm** LUNCH
- 1:45 pm** BREAKOUT SESSIONS
- Analyst 201 – Level up and put a capital “a” in “analyst”
 - Master the art of resolution making
 - Ethics, politics and decisions – Tales from the trenches
- 3:15 pm** REFRESHMENT BREAK
- 3:30 pm** ALL-HANDS ROUNDTABLE
- 6:00 pm** CALAFCO DINNER

FRIDAY, APRIL 12

- 7:30 am** BREAKFAST BUFFET
- 9:00 am** GENERAL SESSION
LAFCo policies – Helpful decision-making framework, constraint on policymaking, or both?
- 10:15 am** REFRESHMENT BREAK
- 10:30 am** GENERAL SESSION
CALAFCO legislative and organizational update

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Holiday Inn Silicon Valley, San Jose - Floor Plan

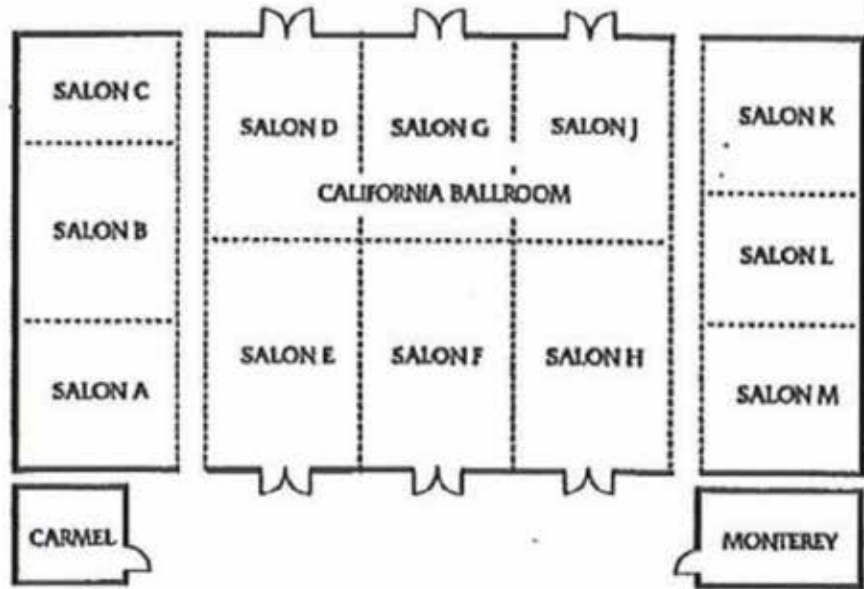


Holiday Inn



CONFERENCE / MEETING ROOMS

MEZZANINE LEVEL



AGENDA

WEDNESDAY, APRIL 10

7:45 am – 12:30 pm MOBILE WORKSHOP

Tour two unique San Jose environs and learn how the preservation of open space and ag lands (Coyote Valley) and the revitalization of the downtown (Silicon Valley) go hand in hand in building climate and economic resilience. Stops include the Coyote Ridge Open Space Preserve, San Jose's historic Diridon Station, the San Francisco Bay Area Planning & Urban Research Assoc. office, and we will end with a delicious lunch at Olla Cocina in San Pedro Square.

BUS LOADS: 7:30 AM | DEPARTS PROMPTLY: 7:45 AM

1:30 pm – 2:00 pm WORKSHOP OPENING – Welcoming remarks – Salons A-B-C

SPEAKERS: Sergio Jimenez, Vice Chair, Santa Clara LAFCo; Pamela Miller, Executive Director, CALAFCO; Neelima Palacherla, Executive Officer, Santa Clara LAFCo

CALAFCO Staff Workshop: April 10-12, 2019

WEDNESDAY, APRIL 10

2:00 pm – 3:15 pm

GENERAL SESSION: MSRs: Tools and determinations – What will withstand legal scrutiny and the test of time? – Salons A-B-C

Approved
for 1.25
AICP CM
Credits

This interactive session explores the effectiveness and use of a checklist and other tools in the preparation of MSRs. We will also examine determinations, some that have worked well and some that haven't. Will your determination survive a legal challenge?

SPEAKERS: SR Jones, Executive Officer, Nevada LAFCo; David Ruderman, Senior Counsel, Colantuono, Highsmith & Whatley, PC; Keene Simonds, Executive Officer, San Diego LAFCo

3:15 pm – 3:30 pm

REFRESHMENT BREAK – (Foyer)

3:30 pm – 5:00 pm

ROUNDTABLES – (Salons A-B-C = Staff; Salon J = Counsel; Salon H = Clerks)

5:30 pm – 7:00 pm

RECEPTION: Bounty of Your County – Lounge and pool area

7:00 pm

DINNER – (On your own)

THURSDAY, APRIL 11

7:30 am – 9:00 am

CONTINENTAL BREAKFAST BUFFET – Salons K-L-M

9:00 am – 10:30 am

BREAKOUT SESSIONS (3 Choices)

Information Exchange and Knowledge Support of the 21st Century – Clerks Style – Salons H-J

Part 1: Clerking 101 – A day in the life of an independent and dependent LAFCo Clerk

Part 2: Clerk's Resource Guide for the 21st Century

SPEAKERS: Amanda Graham, Office Assistant, Fresno LAFCo; Sandy Hou, Clerk, Alameda LAFCo; Amie Kane, Clerk, Tulare LAFCo; Kate Sibley, Executive Assistant, Contra Costa LAFCo

MODERATOR: Tamaron Lockett, Executive Assistant, San Diego LAFCo

CKH: Reading between the lines – Salons D-E

Approved
for 1.5 AICP
CM Credits

Have you ever second-guessed your interpretation of CKH? If so, you'll want to join us for this discussion-style session designed for LAFCo practitioners to exchange common and uncommon terminology and procedural snags within CKH. We will go beyond the text and explore the spirit of CKH through a conversation with LAFCo veterans. Test your skills and improve your rationale as we navigate through the gloomy sections of CKH.

SPEAKERS: Bill Nicholson, Executive Officer, Merced & San Benito LAFCos; Martha Poyatos, Executive Officer, San Mateo LAFCo

MODERATOR: David Fey, Executive Officer, Fresno LAFCo



Making GIS work for the LAFCo layperson – Salons F-G

Approved
for 1.5
AICP CM
Credits

LAFCos are increasingly using ArcGIS as a visualization tool to gain detailed perspective on land use patterns and infrastructure in an effort to limit urban sprawl and conserve resource lands. GIS technology empowers LAFCo staff with enhanced visibility into data, including evaluating project feasibility and their impacts on the environment. This interactive session will cover how to make professional looking maps that can be used in staff reports, presentations and other materials using ArcGIS Online. **Note: Workshop participants must bring a laptop for this “how-to” session.**

SPEAKERS: Greg Bazhaw, GIS Analyst, Santa Clara County Department of Planning & Development; Lakshmi Rajagopalan, Analyst, Santa Clara LAFCo

10:30 am – 10:45 am REFRESHMENT BREAK – (Foyer)

10:45 am – 12:15 pm BREAKOUT SESSIONS – (3 Choices)

Clerk certification - To be or not to be? That is the question. – Salons H-J

Five years ago, a committee worked with CALAFCO to create a proposed process for LAFCo clerk certification, including criteria and a curriculum. For many reasons, the idea was put on hold. Now, with so many new clerks and increased requests for training, it's time to reopen discussions about clerk certification and/or training and what that might entail.

SPEAKERS: Emmanuel Abello, Clerk, Santa Clara LAFCo; Pamela Miller, Executive Director, CALAFCO; Joy Stover, Clerk, Butte LAFCo; Diane Thorpe, Clerk, Sacramento LAFCo; Terri Tuck, Clerk, Yolo LAFCo

MODERATOR: Kate Sibley, Executive Assistant, Contra Costa LAFCo

CEQA 201 – Salons D-E

Approved
for 1.5 AICP
CM Credits

This session will explore LAFCos' use of CEQA exemptions and instances when a LAFCo may need to be the Lead Agency. A panel of experts will discuss items to consider when LAFCo is a Responsible Agency, or in the infrequent CEQA “driver seat,” and finally, when an applicant tries to submit incomplete or ill-conceived CEQA work. We will exchange ideas with seasoned EOs and LAFCo legal counsel. Don't be frightened by CEQA, join us and learn how LAFCo's adapt to environmental review.

SPEAKERS: Scott Browne, Attorney, Law Office of P. Scott Browne; Nathaniel Taylor, Senior Planner, Lamphier-Gregory; Holly Whatley, Attorney, Colantuono, Highsmith & Whatley, PC

MODERATOR: SR Jones, Executive Officer, Nevada LAFCo

Succession planning: Is your LAFCo prepared for the Silver Tsunami? – Salons F-G

Approved
for 1.5 AICP
CM Credits

How ready is your LAFCo to deal with inevitable changes in staff? This session focuses on personnel planning for both expected and unexpected turnover at all levels (EO, Analyst and Clerk). We will discuss best practices and pitfalls of succession planning and outside recruitment to replace key personnel, particularly in small agencies where all roles are critical and much of the institutional knowledge lives with just a few staff members.

SPEAKERS: Carolyn Emery, Executive Officer, Orange LAFCo; Brendon Freeman, Executive Officer, Napa LAFCo; Pat McCormick, Executive Officer, Santa Cruz LAFCo

12:30 pm – 1:30 pm LUNCH – Salons K-L-M

CALAFCO Staff Workshop: April 10-12, 2019

1:45 pm – 3:15 pm BREAKOUT SESSIONS (3 Choices)

Analyst 201 – Level up and put a capital “a” in “analyst” – Salons H-J

Approved
for 1.5 AICP
CM Credits

This session is designed for new and intermediate-level LAFCo analysts. Participants will be encouraged to exchange ideas, going beyond the introductory phase and stepping into analysis of commission proceedings. We will review project management best practices, applicability and how to successfully navigate commission-initiated proposals.

SPEAKERS: Gavin Centeno, Policy Analyst, Orange LAFCo; Brendon Freeman, Executive Officer, Napa LAFCo; Paula de Sousa Mills, Partner, Best Best & Krieger; Joe Serrano, Executive Officer, Santa Cruz

MODERATOR: Paula Graf, Analyst, Imperial LAFCo

Master the art of resolution making – Salons F-G

Approved
for 1.5 AICP
CM Credits

In this session, participants will gain an understanding of LAFCo processes and procedures relating to different types of resolutions and learn basic practices of submitting a resolution. Explore the key information required for different types of resolutions based on various actions (approval vs. disapproval), the CKH required content and the nuances that make a resolution an informative and powerful record.

SPEAKERS: Gary B. Bell, Shareholder, Colantuono, Highsmith & Whatley, PC; Nancy Mees, Clerk, Amador & Calaveras LAFCos

MODERATOR: Doug Dorado, Government Analyst, Los Angeles LAFCo

Ethics, politics and decisions – Tales from the trenches – Salons D-E

Approved for
1.5 AICP CM
Credits & 1.5
Ethics Credits

Hear tales amassed over 72 years of collective LAFCo experience of ethics and politics and the sometimes whacky decisions that come from such a mix. This session will delve in to case studies in which ethics – or a lapse thereof – made all the difference. Additionally, we will examine other case studies offered by LAFCos throughout the state in which ethical dynamics were integral to a commission proceeding and subsequent outcome.

SPEAKERS: David Church, Executive Officer, San Luis Obispo LAFCo; Pat McCormick, Executive Officer, Santa Cruz LAFCo

MODERATOR: Don Lockhart, AICP, Executive Officer, Sacramento LAFCo

3:15 pm – 3:30 pm REFRESHMENT BREAK – (Foyer)

3:30 pm – 5:00 pm ALL-HANDS ROUNDTABLE – (Salons A-B-C)

6:00 pm – 7:30 pm CALAFCO DINNER – (Salons K-L-M)

FRIDAY, APRIL 12

7:30 am – 9:00 am BREAKFAST BUFFET – (Salons K-L-M)

9:00 am – 10:15 am GENERAL SESSION: LAFCo policies – Helpful decision-making framework, constraint on policymaking, or both? – Salons A-B-C

Approved for
1.25 AICP CM
Credits

Some LAFCos have detailed, articulate policies. Others are skeletal. CKH invites policies on many topics. This panel will identify the range of policy topics, the theory behind detailed policies and the pros and cons of particular policies.

SPEAKERS: Michael Colantuono, Shareholder, Colantuono, Highsmith & Whatley, PC; Ben Giuliani, Executive Officer, Tulare LAFCo; Sblend Sblendorio, Commissioner, Alameda LAFCo

10:15 am – 10:30 am REFRESHMENT BREAK – (Foyer)

10:30 am – 12:00 pm GENERAL SESSION: CALAFCO legislative and organizational update – Salons A-B-C

**Approved
for 1.5
AICP CM
& 1.5 Law
Credits**

Join your CALAFCO staff and Legislative Committee leaders for the latest Association news and an up-to-the-minute legislative report on all bills of interest to CALAFCO.

SPEAKERS: Steve Lucas, Executive Officer, Butte LAFCo; Samuel Martinez, Executive Officer, San Bernardino LAFCo; Pamela Miller, Executive Director, CALAFCO; Lou Ann Texeira, Executive Officer, Contra Costa LAFCo



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**NEXT ANNUAL CONFERENCE IS
OCTOBER 30 – NOVEMBER 1, 2019**

*HYATT REGENCY SACRAMENTO
hosted by CALAFCO*



**2019 CALAFCO STAFF WORKSHOP
MOBILE WORKSHOP
SAN JOSE: A TALE OF TWO VALLEYS**

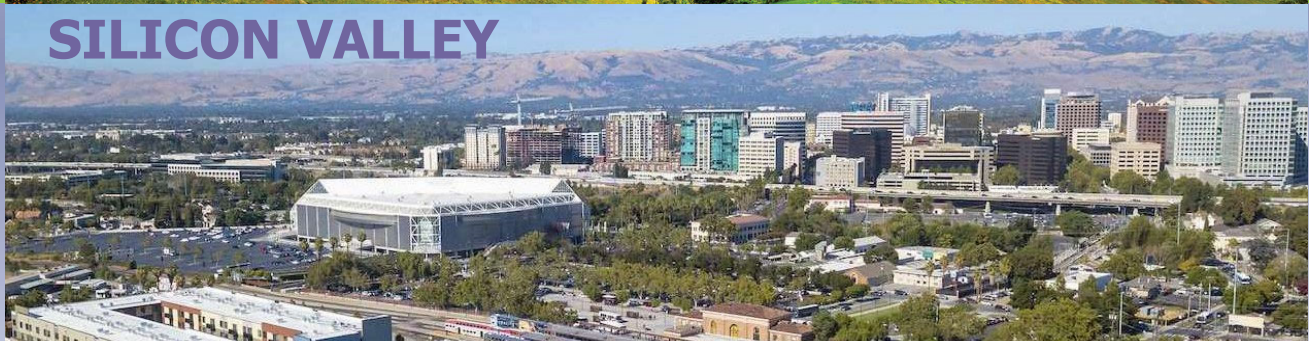


WEDNESDAY, APRIL 10 7:45 A.M. to 12:45 P.M.

BUS LOADS AT 7:30 A.M. & DEPARTS PROMPTLY AT 7:45 A.M.

Tour two unique San Jose environs and learn how the preservation of open space and agricultural lands and the revitalization of the downtown go hand in hand in building climate and economic resilience.

Visit scenic Coyote Valley, a 7,400-acre area located just south of San Jose, rich in natural and working lands. Once planned to be developed into another urban sprawl mini-city, the land is now the focus of intense preservation efforts. We will visit the Coyote Ridge Open Space Preserve and learn how preservation of Coyote Valley is a strategy to optimize agricultural operations on the urban edge, improve wildlife resilience and positively impact water resources.



Then travel to downtown San Jose’s historic Diridon Station, on the cusp of becoming one of the most important transportation hubs in the country and one of the region’s best opportunities to channel new growth, such as the anticipated Google Village, near transit. We will tour the Station area, stop at the SPUR (San Francisco Bay Area Planning and Urban Research Association) office, and hear about the City’s growth strategy and its plans to transform the Station area into a great urban place, attract economic growth, and foster inclusive and sustainable development.

We will end with lunch at Olla Cocina, voted “best Mexico City-Esque Cantina,” in bustling San Pedro Square.

Dress in layers. Long pants are recommended. Light walking is required, so please wear comfortable shoes (such as tennis or hiking boots).



Cost \$50 per person, includes lunch

Deadline to Register

Tuesday, March 26, 2019

Register at www.calafco.org

Space is limited