



AGENDA

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES REGULAR DATE MEETING

June 22, 2026

6:30 p.m.

Community Meeting Room

411 E. Chapman Avenue

Call-in Number: (669) 900-6833

Meeting ID: 850 1206 7452

Password: 046086

ZOOM Link: meetings.placentialibrary.org

Mission Statement:

Placentia Library District inspires, opens minds, innovates, and connects our community.

District Goals:

-  Strengthen connections and expand community relationships.
-  Provide equitable access.
-  Adapt to community needs.
-  Cultivate thriving collections of resources.
-  Provide and promote relevant library services.
-  Maintain fiscal responsibility and integrity.
-  Support and empower staff.
-  Provide an inviting, pleasant, and safe place to explore.

AGENDA DESCRIPTIONS: *The Agenda descriptions are intended to give members of the public notice and a general summary of items of business to be transacted or discussed. The Board may take any action which it deems to be appropriate on the Agenda and is not limited in any way by the notice of the recommended action.*

REPORTS AND DOCUMENTATION: *Reports and documentation relating to Agenda items are on file in the Administrative Office and the Reference Department of Placentia Library District, and are available for public inspection. A copy of the Agenda packet will be available for use during the Board Meetings. Any person having any question concerning any Agenda item may call the Library Director at 714-528-1925, Extension 200.*

PLEDGE OF ALLEGIANCE Library Board President

CALL TO ORDER

1. Call to Order Library Board President
2. Roll Call Recorder
3. Adoption of Agenda

This is the opportunity for Board members to delete items from the Agenda, to continue items, to re-order items, and to make additions pursuant to Government Code Section 54954.2(b).

Presentation: Library Director

Recommendation: Adopt by Motion

Placentia Library District Board of Trustees Regular Date Meeting Agenda, June 22, 2026

4. Oral Communications

Members of the public may address the Library Board of Trustees on any matter within the jurisdiction of the Board. Presentations by the public are limited to 5 minutes per person. Members of the public are also permitted to address the Library Board of Trustees on specific Agenda Items before and at the time that an Item is being considered by the Board. Action may not be taken on items not on the Agenda except in emergencies or as otherwise authorized. Reference: California Government Code Sections 54954.3, 54954.2(b).

TRUSTEE & ORGANIZATIONAL REPORTS

5. Board President Report - oral

The President makes announcements of general interest to the community and the Library Board of Trustees as well as conducting any ceremonial matters.

6. Trustee Reports

The Trustees make announcements of general interest to the community and the Library Board of Trustees, and report on meetings attended on behalf of the Board of Trustees.

7. Library Director Report

8. Placentia Library Friends Foundation Board of Director's Report

CONSENT CALENDAR (Items 9 – 24)

Presentation: Library Director

Recommendation: Approve by Motion

Items 9 – 24 may be considered together as one motion to approve the Consent Calendar. Items may be removed for individual consideration before the Consent Calendar is adopted. Items removed must then each have a separate motion.

MINUTES (Item 9)

9. Minutes of the Library Board of Trustees Unusual Date Meeting on May 26, 2026. (Receive & File and Approve)

CASH FLOW ANALYSIS (Items 10 – 11)

10. Check Register for May 2026. (Receive & File and Approve)

11. FY2025-2026 Fund Balance through May 2026; the Schedule of Anticipated Property Tax Revenues for FY2024-2025 as provided by the Orange County Auditor. (Receive & File).

TREASURER'S REPORTS (Items 12 – 16)

12. Financial Reports for May 2026 for Placentia Library District Accounts on Deposit with the Orange County Treasurer. (Receive & File)

13. Revenue and Expenditure Reports for May 2026. (Receive & File)

14. Acquisitions Report for May 2026. (Receive & File)

15. Entrepreneurial Activities Report and May 2026. (Receive & File)

16. Library Impact Fee Report for May 2026. (Receive & File)

GENERAL CONSENT REPORTS (Items 17 – 20)

17. Personnel Report for May 2026. (Receive, File, and Ratify Appointments)

18. Review Shared Maintenance Costs with the City of Placentia under the JPA. (Receive & File)

19. Administration Report for May 2026.

20. Circulation Report for May 2026.

Placentia Library District Board of Trustees Regular Date Meeting Agenda, June 22, 2026

STAFF REPORTS (Items 21 – 24)

21. Children's Services Report for May 2026.
22. Adult and Teen Services Report for May 2026.
23. Technology and Website Report for May 2026.
24. Customer Service Report for May 2026.

NEW BUSINESS (Items 25-31)

25. Review of Draft Municipal Service Review Prepared by the Orange County Local Agency Formation Commission.
26. Adopt Resolution 2026-03 approving the amended 2026-2027 Fiscal Year Budget.
27. Discuss date for August Board meeting due to a schedule conflict with the California Special District Association Conference.
28. Election for California Special Districts Association (CSDA) Board of Directors – Southern Network Seat C, 2027-2029 Term.
29. Legislative Updates from Trustee Nelson.
30. Roundtable Women's Club Updates from Secretary Dahl.
31. LAFCO Updates from Trustee Beverage.

AGENDA DEVELOPMENT (Item 32)

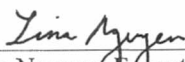
32. Agenda Preparation for the July Regular Date Meeting which will be held on July 27, 2026 unless re-scheduled by the Library Board of Trustees.

ADJOURNMENT (Item 33)

33. The Library Board of Trustees will adjourn the Regular Date June 22, 2026 meeting.

*****CERTIFICATION OF POSTING*****

I, Lina Nguyen, Executive Assistant of the Placentia Library District, hereby certify that the Agenda for June 22, 2026 Regular Date Meeting of the Library Board of Trustees of the Placentia Library District was posted on June 17, 2026.



Lina Nguyen, Executive Assistant



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MINUTES
PLACENTIA LIBRARY DISTRICT
UNUSUAL DATE MEETING OF THE LIBRARY BOARD OF TRUSTEES
MAY 26, 2026

CALL TO ORDER

President Carline called the Regular Date Meeting of the Placentia Library District (PLD) Board of Trustees to order on May 26, 2026, at 6:33 p.m.

Members Present: President Gayle Carline, Trustee Stephanie Beverage, Trustee Scott Nelson.

Members Absent: Secretary Sherri Dahl, Trustee Nithin Jilla

Staff Present: Jeanette Contreras, Library Director; Yesenia Baltierra, Assistant Library Director; Carlo Maskarino, Business Manager (absent after 6:39 p.m.); Lina Nguyen, Executive Assistant.

Guests: None

ADOPTION OF AGENDA

President Carline requested to move agenda item 25 to go immediately after the adoption of the agenda. It was motioned by Trustee Beverage to adopt agenda as modified. It was seconded by Trustee Nelson (Item 3). All in favor:

AYES:	Carline, Beverage, Nelson
NOES:	None
ABSENT:	Dahl, Jilla

ORAL COMMUNICATION

None (Item 4).

BOARD PRESIDENT REPORT

President Carline reported she had her monthly luncheon with Library Director Contreras. She was also a guest speaker at the HU chapter of an organization that Dr. Voiza Arnold is a part of.

**TRUSTEE &
ORGANIZATIONAL
REPORTS**

Secretary Dahl had an excused absence.

Trustee Beverage reported she attended the First Responders Recognition Breakfast and completed her Trustee training through the California Special Districts Association (CSDA).

Trustee Jilla had an excused absence.

Trustee Nelson shared the passing of his beloved dog that was part of his family for the past 15 years. He also reported that he will complete his Trustee training at the CSDA Conference.

**LIBRARY DIRECTOR
REPORT**

Director Contreras reported that the District had completed interviews for the Technology Manager position and had extended an offer to Jeremy Yamaguchi, who has accepted. As he is currently serving as the District's IT Consultant, the District will discontinue the IT Consultant role upon his start date. The Technology Manager position will also assume certain duties that currently fall under the Circulation Supervisor role. His tentative start date is August 17, 2026.

She also shared that her son recently graduated from Saddleback College and will

be transferring to the University of California, Irvine. Additionally, she served as one of the guest speakers for San Jose State University's annual symposia during Asian American, Native Hawaiian, and Pacific Islander (AANHPI) Heritage Month.

Director Contreras then provided an update on the PLFF Board Meeting. The bookstore generated \$2,152.84 in revenue in April, bringing the fiscal year-to-date total to \$19,141.14. Deposits for the month totaled \$2,314.45. The Board approved and appointed a new board member, Ariana O'Brien. They also reported that their student representative has transitioned into the role of recording secretary and is now a voting member, and that she is responsible for selecting a new student representative to fill the vacancy.

Director Contreras further reported that the District recently hosted the Santiago Library System's Executive Council Meeting. There is still no resolution regarding the missing funds from the Dolly Parton Imagination Grant. Officers for the Executive Council were elected. While funding will be available for the upcoming Library Directors Forum, the system is projecting a reduction in total Library Services Act funding. Zip Books and e-collection funds will continue, though the Santiago Library System anticipates operating at a deficit. As such, the District will need to evaluate options for covering it.

Finally, Director Contreras reported she and the IT Consultant met with a vendor to discuss a reservation platform that would streamline staff time spent managing reservations for study rooms, study pods, and the meeting room.

CONSENT CALENDAR

It was moved by Trustee Beverage and seconded by Trustee Nelson to approve Agenda Items 9-24 as presented. A roll call vote was taken:

AYES: Carline, Beverage, Nelson
NOES: None
ABSENT: Dahl, Jilla

**MINUTES FOR REGULAR
DATE MEETING ON APRIL
26, 2026.**

The minutes for the Regular Date Meeting on April 26, 2026, were received, reviewed and filed (Item 9).

AYES: Carline, Beverage, Nelson
NOES: None
ABSENT: Dahl, Jilla

**CASH FLOW ANALYSIS
AND TREASURER'S
REPORTS**

Check Registers for April 2026 (Item 10)
Fund 707 Balance Report for April 2026 (Item 11)
Financial Reports through April 2026 for Placentia Library District Accounts on Deposit with the Orange County Treasurer and Placentia Library District General Ledger: Summary of Cash and Investments (Item 12)
Balance Sheets for April 2026 (Item 13)
Acquisitions Report for April 2026 (Item 14)
Entrepreneurial Activities Report for April 2026 (Item 15)
Library Impact Fee Report for April 2026 (Item 16)

**GENERAL CONSENT
REPORTS**

Personnel Report for April 2026 (Item 17)
Review of Shared Maintenance Costs with the City of Placentia (Item 18)
Administration Report for April 2026 (Item 19)

Circulation Report for April 2026 (Item 20)

STAFF REPORTS

Children's Services Report April 2026 (Item 21)

Adult Services Report for April 2026 (Item 22)

Placentia Library Website Technology Report for April 2026 (Item 23)

Customer Service Report (Items 24)

ADOPTION OF RESOLUTION 2026-02: A RESOLUTION OF THE BOARD OF TRUSTEES OF THE PLACENTIA LIBRARY DISTRICT OF ORANGE COUNTY TO ESTABLISH THE APPROPRIATIONS LIMITATION (GANN LIMIT) AT \$7,178,848.61 FOR FISCAL YEAR 2026-2027.

Business Manager Maskarino reported that the Gann Limit for the 2026–2027 fiscal year is set at \$7,178,848.61. This limit establishes the maximum amount of appropriations the District may spend and is calculated based on cost-of-living and population factors. He noted that the limit includes all revenue sources, such as grants and state funding. Exceeding the Gann Limit would require reporting the excess to the Department of Finance rather than returning the funds. Following a brief discussion, President Carline read Resolution 2026-02 by title only: A Resolution of the Board of Trustees of the Placentia Library District of Orange County to Establish the Appropriations for Fiscal Year 2026–2027. Trustee Beverage then made a motion to adopt Resolution 2026-02: A Resolution of the Board of Trustees of the Placentia Library District of Orange County to Establish the Appropriations for Fiscal Year 2026-2027. It was seconded by Trustee Nelson. A roll call vote was taken:

AYES:	Carline, Beverage, Nelson
NOES:	None
ABSENT:	Dahl, Jilla

Director Contreras noted that Resolution 2026-02 will need to be updated and signed by President Carline in lieu of Secretary Dahl, as Secretary Dahl was absent for the meeting and her name appears on the resolution.

AUTHORIZATION TO CLOSE THE LIBRARY ON AUGUST 28, 2026 FOR STAFF DEVELOPMENT DAY.

Director Contreras requested Board approval for the District's closure on August 28, 2026, for Staff Development Day. Planned training for the day includes special needs training, CPR/AED certification, and a budget review. Trustee Beverage made a motion to authorize a closure on August 28, 2026 for Staff Development Day. It was seconded by Trustee Nelson. A roll call vote was taken:

AYES:	Carline, Beverage, Nelson
NOES:	None
ABSENT:	Dahl, Jilla

JOINT USE COMMITTEE UPDATES FROM TRUSTEE NELSON.

The previous Joint Use Meeting was reported at the April Board Meeting. The meeting minutes are attached for review.

INDEPENDENT SPECIAL DISTRICTS OF ORANGE COUNTY (ISDOC) & LEGISLATIVE UPDATES FROM TRUSTEE NELSON.

Trustee Nelson expressed concerns regarding proposed reductions to impact fees that may negatively affect libraries and recommended supporting fellow special districts.

PLACENTIA ROUNDTABLE WOMEN'S CLUB (PRTWC)

Director Contreras reported that Secretary Dahl was absent; however, the calendar of upcoming May events for the Placentia Round Table Women's Club was included in the Board Book.

**UPDATES FROM SECRETARY
DAHL.**

**LOCAL AGENCY
FORMATION COMMISSION
(LAFCO) UPDATES FROM
TRUSTEE BEVERAGE.**

Trustee Beverage reported that a draft of the District's Municipal Service Review (MSR) had been submitted to the District, and staff had provided a response to OC LAFCO. She noted that MSRs have not been discussed during their monthly meetings.

Director Contreras added that she had spoken with an OC LAFCO representative, who indicated that the agency is recommending the District remain an independent agency and should not be absorbed by the City or County.

AGENDA DEVELOPMENT

Director Contreras reported budget amendments need to be presented to the Board. A budget work session was scheduled for 4:00 p.m. ahead of the Regular Date Meeting on June 22, 2026 at 6:30 p.m.

If there are any items the Trustees would like to see on the agenda for next month, they can email President Carline or Director Contreras.

The next Board Meeting will be on June 22, 2026, at 6:30 p.m.

ADJOURNMENT

The Board of Trustees Unusual Date Meeting of May 26, 2026 was adjourned at 7:06 p.m.

Gayle Carline, President
Library Board of Trustees

03:02 P.M.
06/10/26
Accrual Basis

Placentia Library District
Check Register
May 2026

Date	Ref No.	Payee	Memo	Payment	Type
5/5/2026	14893	Legacy Integrative Solutions	Service from 03/28/26-04/28/26	840.72	Bill Payment
5/5/2026	14894	Midwest Tape-Hoopla	Hoopla database for April 2026	6,283.08	Bill Payment
5/5/2026	14895	Emmy Lam	Recycle Origami Workshop PO 331	450.00	Bill Payment
5/5/2026	14896	Hanabi Taiko	One Coast, One Book performance PO 327	400.00	Bill Payment
5/5/2026	14900	Cintas	Janitorial supplies	275.51	Bill Payment
5/5/2026	14901	Safer Choice Cleaning	Commercial carpet cleaning and upholstery	4,306.50	Bill Payment
5/5/2026	14902	Promise Energy, Inc.	O&M - Service and Maintenance	4,800.00	Bill Payment
5/5/2026	14903	New Readers Press	25/26 CLLS Literacy Collection	501.96	Bill Payment
5/5/2026	14904	Public Agency Retirement Services	Contributions for payroll on 05/06/26	2,589.29	Bill Payment
5/5/2026	14906	Placentia-Yorba Linda Unified School Dist	Bus Trips for Third Grade Visits	562.48	Bill Payment
5/5/2026	14907	Columbia Bank	04/30/26 Statement	4,018.93	Bill Payment
5/7/2026	14908	SDRMA	Medical & Ancillary Benefits June 2026	33,850.53	Bill Payment
5/7/2026	14909	Southern California Edison	Service from 04/01/26-04/30/26	2,850.93	Bill Payment
5/18/2026	14910	Carlo Maskarino	Reimbursement for USPS Certified Mail and Return Receipt Tracking for mail	58.20	Bill Payment
5/18/2026	14911	Dewey Pest Control	May Service	90.00	Bill Payment
5/18/2026	14912	Placentia-Yorba Linda Unified School Dist	Van Buren Elementary Bus and SRP Foam Posters	219.00	Bill Payment
5/18/2026	14913	Tim Balen	Reimbursement for program snacks and mileage	54.67	Bill Payment
5/18/2026	14914	Columbia Bank	CC Transactions	12,297.41	Bill Payment
5/18/2026	14915	Playaway Products	Wonderbooks	330.45	Bill Payment
5/18/2026	14916	Amazon Capital Services	Books	4,408.99	Bill Payment
5/18/2026	14917	OverDrive	Ebooks and Audiobooks	657.39	Bill Payment
5/18/2026	14918	Woodruff & Smart, APC	For Services Rendered Through 04/30/26	2,845.80	Bill Payment
5/18/2026	14919	Republic Services	Recycling Service 04/01/26-04/30/26	363.88	Bill Payment
5/18/2026	14920	Cintas	Pickup Service 05/01/26-05/31/26	263.34	Bill Payment
5/18/2026	14921	CALNET3	Janitorial supplies	271.58	Bill Payment
5/18/2026	14922	Golden State Water Company	Service from 04/02/26-05/05/26	2,092.39	Bill Payment
5/18/2026	14923	Placentia Library District	For payroll on 06/03/26	80,000.00	Bill Payment
5/26/2026	14924	Occupational Health Centers of California, A Medical Corp	Physicals for new staff: SB, KP, & AW	1,002.00	Bill Payment
5/26/2026	14925	IDS Group Inc.	HVAC Mechanical Screens Construction Documents	1,926.85	Bill Payment
5/26/2026	14926	Imperial County Office of Education	MRC Q3 Jan-Mar 2026	447.61	Bill Payment
5/26/2026	14927	American Library Association	ALA, PLA & UNITED 2026 Membership Renewal for GC	220.00	Bill Payment
5/26/2026	14928	SoCalGas	Service from 04/16/26-05/19/26	26.15	Bill Payment
5/26/2026	14929	Cintas	Janitorial supplies	263.23	Bill Payment
5/26/2026	14930	Staples, Inc.	Toilet paper, paper towels, and hand soap & Printer toner for library director	1,010.01	Bill Payment
5/26/2026	14931	Eagle Multi Media Productions	April IT Services	9,576.67	Bill Payment
5/26/2026	14932	Amazon Capital Services	Books	1,475.34	Bill Payment
5/26/2026	14933	Charter Communications	Service from 05/12/26-06/11/26	99.46	Bill Payment

03:02 P.M.
06/10/26
Accrual Basis

Placentia Library District
Check Register
May 2026

Date	Ref No.	Payee	Memo	Payment	Type
5/26/2026	14934	Public Agency Retirement Services	Contributions for payroll on 05/20/26	2,608.54	Bill Payment
TOTAL				<u>\$ 184,338.89</u>	

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Carlo Maskarino, Business Manager

SUBJECT: Fund Balance Report through May 2026 for Placentia Library District Investment Fund with State of California Local Agency Investment Fund (LAIF)

DATE: June 22, 2026

Fiscal Year 2025-2026	
7/31/2025	0.00
8/31/2025	0.00
9/30/2025	0.00
10/31/2025	0.00
11/30/2025	0.00
12/31/2025	0.00
1/31/2026	0.00
2/28/2026	0.00
3/31/2026	0.00
4/30/2026	0.00
5/31/2026	0.00
6/30/2026	

Fiscal Year 2024-2025	
7/31/2024	852,276.28
8/31/2024	855,407.23
9/30/2024	858,520.48
10/31/2024	861,666.97
11/30/2024	864,837.12
12/31/2024	867,971.89
1/31/2025	871,184.42
2/28/2025	0.00
3/31/2025	0.00
4/30/2025	0.00
5/31/2025	0.00
6/30/2025	0.00



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Carlo Maskarino, Business Manager

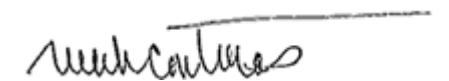
SUBJECT: **Financial Reports through May 2026 for the Placentia Library District's Investment and Banking Accounts**

DATE: June 22, 2026

Summary of Cash and Investments as of May 31, 2026

Cash with State of California LAIF	\$ -
Cash with California CLASS	\$ 753,027.65
<i>(Impact Fees – Restricted)</i>	\$ 121,786.48
General Fund Checking – BMO	\$ 2,265,703.64
General Fund Savings – BMO	\$ 1,157,184.75
Payroll Checking – Wells Fargo Bank	\$ 123,850.69
Total Cash and Investments	\$ 4,299,766.73

I hereby certify that the investments are in compliance with Placentia Library District Policy 3035 – Investment of District Funds, as adopted by the Library Board of Trustees, and California Government Code Section 53646(b)(1); and that Placentia Library District has the ability to meet its budgeted expenditures for the next six (6) months.



Jeanette Contreras
Library Director



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PLACENTIA LIBRARY DISTRICT
YTD REVENUE REPORT
AS OF MAY 31, 2026

Acct #	DESCRIPTION	BUDGET	YTD ACTUAL	BALANCE	PERCENT % RECEIVED
PROPERTY TAX REVENUE					
4010	Property Taxes - Current Secured	3,352,095	3,772,491	420,396	112.5%
4020	Property Taxes - Current Unsecured	100,576	88,172	(12,404)	87.7%
4050	Property Taxes - Curr Supplemental	76,353	65,829	(10,524)	86.2%
4070	Interest on Unapport Tax	8,575	3,353	(5,222)	39.1%
4080	Penalties & Costs on Delinq Taxes	28,940	34,310	5,370	118.6%
4090	Taxes Special Dist Augmentation	9,451	4,901	(4,550)	51.9%
* 4180	Other Revenue	0	83,777	83,777	-
4190	State - Homeowners Property Tax Relief	12,491	10,113	(2,378)	81.0%
	Sub Total	3,588,481	4,062,946	474,465	113.2%
INTEREST REVENUE					
4600	Interest	134,883	59,142	(75,741)	43.8%
	Sub Total	134,883	59,142	(75,741)	43.8%
GRANT REVENUE					
4210	State Grants	120,000	133,546	13,546	111.3%
4220,4230	Fed/Other Grants	2,500	1,000	(1,500)	40.0%
	Sub Total	122,500	134,546	12,046	109.8%
MISCELLANEOUS REVENUES					
4410	PLFF Grants	48,000	47,919	(81)	99.8%
4310	Fines & Fees	15,249	21,099	5,850	138.4%
4320, 4330	Passport/Photos	227,775	215,819	(11,956)	94.8%
4340	Meeting Room Fees	2,115	5,300	3,185	250.6%
* 4430	Other: Miscellaneous	0	11,763	11,763	-
	Sub Total	293,139	301,900	8,761	103.0%
TOTAL REVENUES YTD FOR FY 25/26:		4,139,003	4,558,534	419,531	110.1%

CASH, INVESTMENTS, & LIBRARY IMPACT FEES			
		BEGINNING BALANCE	END BALANCE
Cash/Investments		4,402,078	4,299,767
Impact Fees - Restricted Funds		120,172	121,786

* Mathematically unable to divide by zero.

PLACENTIA LIBRARY DISTRICT
EXPENDITURES REPORT
as of May 31, 2026

ACCOUNT		DESCRIPTION	91.67% of the year completed.		CURRENT REMAINDER	
			APPROPRIATIONS	EXPENDED		
SALARIES & EMPLOYEE BENEFITS						
5010, 5020	Salaries & Wages		1,935,516	1,659,782	0.86	275,734
5030	Retirement & Post Employment Trust 115		76,751	62,547	0.81	14,205
5040	Unemployment Insurance		0	0	0.00	0
5050	Health Insurance		342,257	329,577	0.96	12,680
5060	Life Insurance		5,412	3,924	0.72	1,488
5064	Dental Insurance		14,563	9,018	0.62	5,545
5066	AD & D Insurance		7,088	5,076	0.72	2,012
5068	Vision Insurance		2,651	2,126	0.80	525
5070	Workers' Compensation Insurance		22,845	8,250	0.36	14,595
5090	Education Assistance Program		2,500	0	0.00	2,500
TOTAL			\$2,409,583	\$2,080,298	0.86	\$329,285
SERVICES & SUPPLIES						
5099	Property & Liability Insurance		83,352	66,901	0.80	16,451
5100-5140	Communications, Internet, Cable		41,521	4,628	0.11	36,893
5150-5180	Janitorial Supplies & Services		87,142	74,775	0.86	12,367
5160	Refuse Disposal		5,271	4,287	0.81	984
5205	Maintenance Equipment		16,190	13,139	0.81	3,051
5200, 5210-5280	Building & Maintenance		317,417	118,929	0.37	198,488
5290-5292	Memberships		12,378	11,975	0.97	403
5300-5350	Office Expenses & Postage		168,891	126,321	0.75	42,570
5400-5480	Prof./Specialized Services		320,997	282,235	0.88	38,762
5490	Loan Obligation (i-bank)		75,645	73,448	0.97	2,197
5495, 5910, 5920	Programs, PLFF Grant, Fed & State Grant		50,000	48,216	0.96	1,784
5500	Books/Library Materials		274,000	226,545	0.83	47,455
5600	Travel & Meetings/Professional Development		40,000	35,921	0.90	4,079
5700	Mileage/Parking		1,962	919	0.47	1,043
5800	Utilities		105,525	69,168	0.66	36,357
5900	Bookmobile - Vehicle		350,000	199,510	0.57	150,490
5901	Bookmobile - Collection		0	0	0.00	0
5902	Bookmobile - Supplies & Materials		2,000	453	0.23	1,547
5904	Bookmobile - Other		2,000	2,862	1.43	(862)
6000	Other		5,000	1,526	0.31	3,474
6100	Taxes and Assessments		10,249	10,146	0.99	103
TOTAL			\$1,969,540	\$1,371,905	0.70	\$597,635
RESTRICTED FUNDS						
OPERATING EXPENSES			\$4,379,123	\$3,452,203	0.79	\$926,920
Library Impact Fees			1,188,282	1,066,496	0.90	\$121,786
TOTAL BUDGET						
			\$4,379,123	\$3,452,203	0.79	\$926,920

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Jeanette Contreras, Library Director

FROM: Yesenia Baltierra, Assistant Library Director

SUBJECT: Acquisitions Report for May 2026

DATE: June 22, 2026

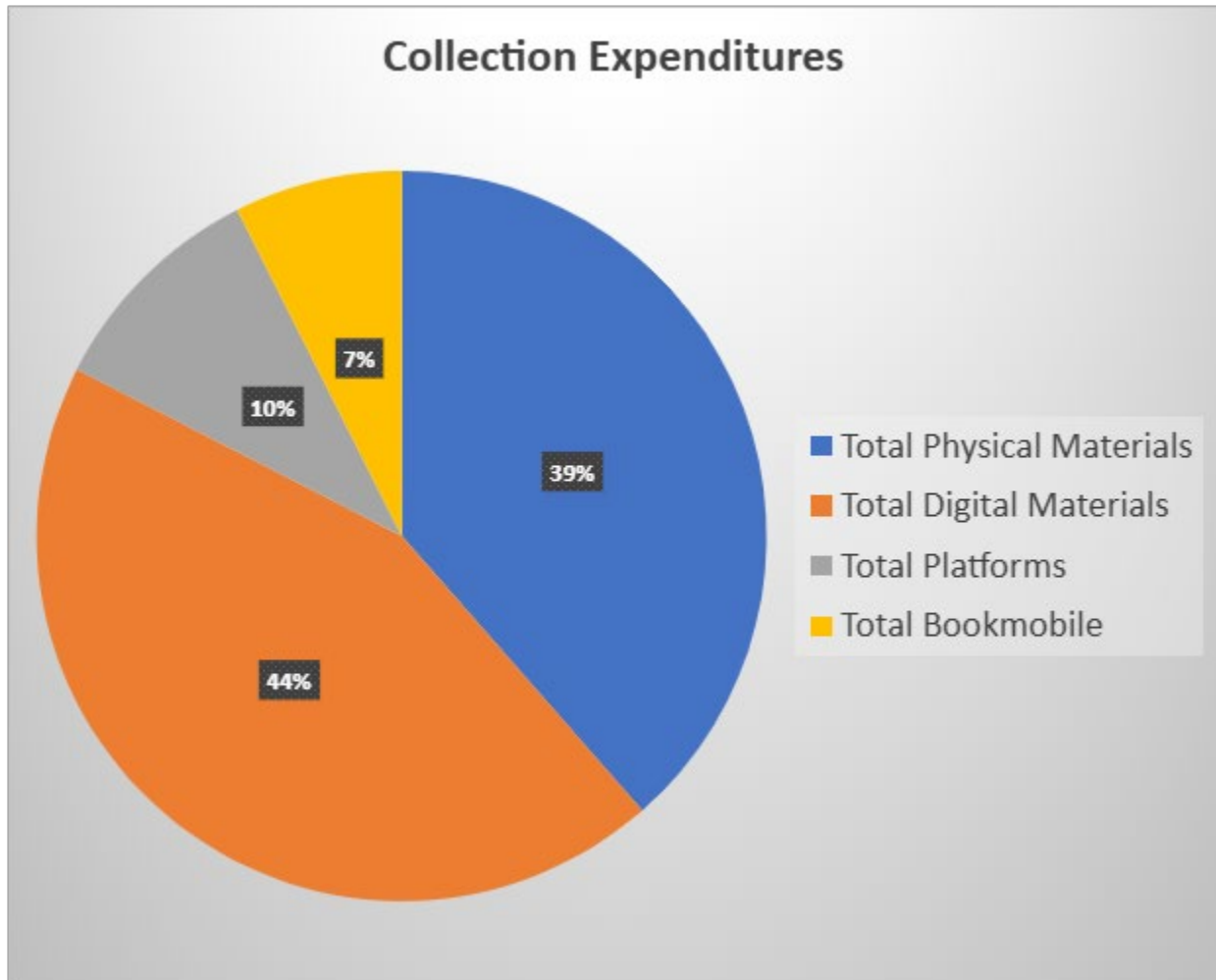
MONTHLY STATISTICS

Total Budget	FY 2025-26	% Spent	FY 2024-25	% Spent
Library	\$265,000	92%	\$342,328	88%
Bookmobile	\$9,000	217%	\$90,000	56%
Total Budget	\$274,000	96%	\$432,328	81%

^ Budget updated, as approved by Board on March 23, 2026

Collection Expenditures	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	FY 2025-26	FY 2024-25	% changed
Print Materials	\$4,275.31	\$14,243.00	\$79,157.19	\$108,156.00	-27%
Serial Subscription	\$0.00	\$158.00	\$2,964.74	\$3,567.00	-17%
Audio Materials	\$113.25	\$728.00	\$8,468.14	\$19,007.00	-55%
Video Materials	\$116.10	\$1,017.00	\$4,823.81	\$7,290.00	-34%
LOTs	\$0.00	\$0.00	\$5,650.89	\$4,748.00	19%
Total Physical Materials	\$4,504.66	\$16,146.00	\$101,064.77	\$142,769.00	-29%
Digital eBooks	\$1,804.52	\$2,173.00	\$27,330.26	\$31,650.00	-14%
Digital eAudiobooks	\$5,743.70	\$7,466.00	\$75,063.39	\$71,824.00	5%
Digital Videos	\$465.98	\$1,794.00	\$6,638.68	\$16,245.00	-59%
Digital Magazines	\$22.91	\$95.00	\$5,256.03	\$5,986.00	-12%
Digital Music	\$42.72	\$151.00	\$1,075.42	\$7,351.00	-85%
Total Digital Materials	\$8,079.83	\$11,679.00	\$115,363.78	\$133,058.00	-13%
Online Learning Platforms	\$0.00	\$0.00	\$26,298.16	\$25,766.00	2%
Total Platforms	\$0.00	\$0.00	\$26,298.16	\$25,766.00	2%
Bookmobile Print Materials	\$0.00	\$8,772.00	\$5,257.41	\$50,072.00	-90%
Bookmobile Audio Materials	\$0.00	\$0.00	\$4,896.91	\$0.00	0%
Bookmobile Digital	\$0.00	\$0.00	\$0.00	\$0.00	0%
Bookmobile LOTs	\$0.00	\$0.00	\$9,347.83	\$0.00	0%

Total Bookmobile	\$0.00	\$8,772.00	\$19,502.15	\$50,072.00	-61%
Total Collection Expenditures	\$12,584.49	\$36,597.00	\$262,228.86	\$351,663.00	-25%



Titles Added	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	FY 2025-26	FY 2024-25	% changed
Print Materials	291	553	3,909	4,560	-14%
Serial Subscription	-	-	2	4	-50%
Audio Materials	2	8	117	249	-53%
Video Materials	2	4	122	134	-9%
LOTs	1	2	47	8	475%
Total Physical Materials	296	567	4,197	4,955	-15%
Digital eBooks	668	1,259	10,557	12,620	-16%

Digital eAudiobooks	1,964	2,757	25,081	25,649	-2%
Digital Videos	244	1,553	3,076	8,094	-62%
Digital Magazines	9	33	6,427	5,874	9%
Digital Music	28	101	704	910	-23%
Total Digital Materials	2,913	5,703	45,845	53,147	-14%
Online Learning Platforms	0	0	7	6	17%
Total Platforms	0	0	7	6	17%
Bookmobile Print Materials	4	441	419	1,933	-78%
Bookmobile Audio Materials	3	0	70	0	_*
Bookmobile Digital	0	0	0	0	_*
Bookmobile LOTs	0	0	42	0	_*
Total Bookmobile	7	441	531	1,933	-73%
Total Titles Added	3,216	6,711	50,580	60,041	-16%

All Materials Held	May	April	Month to Month
	2026	2026	% changed
Total Library Physical	75,698	74,812	1%
Total Digital	2,318,766	2,283,377	2%
Total Bookmobile Physical	3,040	3,018	1%
Total All Materials	2,397,504	2,361,207	2%

Library Children's Physical Materials Held	May	April	Month to Month
	2026	2026	% changed
Children's Fiction	24,309	24,006	1%
Children's Nonfiction	11,670	11,672	0%
Children's Spanish	3,017	2,944	2%
Children's Audiobook	1,206	1,210	0%
Children's DVD/Video	1,361	1,362	0%
Children's LOTs	68	68	0%
TOTAL Library Children's Physical Material	41,631	41,262	1%

Library Adult/Teen Physical Materials Held	May	April	Month to Month
	2026	2026	% changed
Adult Fiction	14,504	14,225	2%
Adult Nonfiction	11,565	11,334	2%
Adult Foreign Language	1,146	1,148	0%
Adult Audiobook	759	810	-6%
Adult DVD/Video	2,735	2,735	0%
Adult LOTs	189	173	9%
Vinyl Records	199	199	0%
Video Games	403	402	0%
Teen Fiction	2,310	2,267	2%
Teen Nonfiction	257	257	0%
TOTAL Library Adult/Teen Physical Material	34,067	33,550	2%

Digital Material Held	May	April	Month to Month
	2026	2026	% changed
eBooks	1,215,485	1,200,193	1%
Digital Audiobooks	425,406	412,532	3%
Digital Videos	100,066	99,085	1%
Digital Magazines	6,800	6,764	1%
Digital Music	571,003	564,797	1%
Online Learning Platforms	6	6	0%
TOTAL Library Digital Material	2,318,766	2,283,377	2%

Library of Things Held	May	May	FY-T-D
	2026	2025	% changed
Children's LOTs Items	69	70	-1%
Adult LOTs Items	123	91	35%
Total LOTs Items	192	161	19%

Library of Things Updates	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	FY 2025-26	FY 2023-24	% changed
New LOTs Items Added	1		47		
LOTs Items Replaced	3		27		
LOTs Items Removed	0		19		

Bookmobile Children's Physical Materials Held	May	April	Month to Month
	2026	2026	% changed
Children's Fiction	1,787	1,787	0%
Children's Nonfiction	682	682	0%
Children's Spanish	297	297	0%
Children's Audiobook	70	70	0%
Children's DVD/Video	0	0	-*
Children's LOTs	42	20	110%
TOTAL All Children's Physical Material	2,878	2,856	1%

Bookmobile Adult/Teen Physical Materials Held	May	April	Month to Month
	2026	2026	% changed
Adult Fiction	44	44	0%
Adult Nonfiction	0	0	-*
Adult Spanish	0	0	-*
Teen Fiction	77	77	0%
Teen Nonfiction	41	41	0%
TOTAL All Adult/Teen Physical Material	162	162	0%

* Mathematically unable to divide by zero.



PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Carlo Maskarino, Business Manager

SUBJECT: Service Revenue Activities Report for May 2026

DATE: June 22, 2026

Net Revenue Summary for May 2026

			YTD	YTD
	May-26	May-25	2025-2026	2024-2025
Passport	14,980	20,535	152,586	190,525
Passport Photos	5,800	7,860	63,233	78,480
Fines & Fees	2,176	1,917	21,099	16,838
Meeting Room	105	500	5,300	2,850
TOTAL	\$ 23,061	\$ 30,812	\$ 242,218	\$ 288,693



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TO: Library Board of Trustees

FROM: Carlo Maskarino, Business Manager

SUBJECT: **Library Impact Fee Report – May 2026**

DATE: June 22, 2026

Total Monthly Fees Collected			YTD	YTD
	May-26	May-25	2025-2026	2024-2025
	\$3,108.84	\$1,045.00	\$96,090.43	\$191,827.83

[illegible]

2025/2026 YTD Total	\$96,090.43
Beginning Balance (7/01/2025)	\$ 1,093,686.11
Ending Balance (05/31/2026)	\$121,786.48



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Carlo Maskarino, Business Manager

SUBJECT: Personnel Report for May 2026

DATE: June 22, 2026

			YTD	YTD
	May-26	May-25	2025-2026	2024-2025
Separation	0	1	3	2
Retirement	0	0	0	0
Appointments	3	0	7	4
Open Positions	0	1	0	3
Workers' Compensation Leave	0	0	0	0
TOTAL	3	0	10	9

SEPARATION:

None

RETIREMENT:

None

APPOINTMENTS:

On-Call Library Clerk – Audrey Wachs

On-Call Library Assistant – Sabrina Bobadilla

On-Call Library Assistant – Kate Spector

OPEN POSITIONS:

None

WORKERS COMPENSATION LEAVE:

None



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Carlo Maskarino, Business Manager

SUBJECT: City of Placentia - Shared Maintenance Costs through May 2026

DATE: June 22, 2026

CITY OF PLACENTIA INVOICES

PERIOD COVERED FY 2025-2026	INVOICE DATE	TURF (Merchants)	GROUND (SA Aquatics)	AT&T	FACILITY MAINT	TOTAL
Jul-25	7/28/2025	3,039.62	291.20	26.28	0.00	3,357.10
Aug-25	*	*	*	*	*	*
Sep-25	*	*	*	*	*	*
Oct-25	10/14/2025	3,039.62	873.60	26.10	0.00	3,939.32
Nov-25	*	*	*	*	*	*
Dec-25	*	*	*	*	*	*
Jan-26	*	*	*	*	*	*
Feb-26	2/19/2026	4,370.82	1,164.80	66.26	2,474.11	8,075.99
Mar-26	*	*	*	*	*	*
Apr-26	*	*	*	*	*	*
May-26	*	*	*	*	*	*
Jun-26						
TOTAL		\$10,450.06	\$2,329.60	\$118.64	\$2,474.11	\$15,372.41

* City Billing Not Received

PERIOD COVERED FY 2024-2025	INVOICE DATE	TURF (Merchants)	GROUND (SA Aquatics)	AT&T	FACILITY MAINT	TOTAL
Jul-24	7/22/2024	1,519.81	582.40	0.00	0.00	2,102.21
Aug-24	*	*	*	*	*	*
Sep-24	9/12/2024	1,519.81	582.40	48.86	0.00	2,151.07
Oct-24	10/17/2024	3,039.62	291.20	13.09	0.00	2/24/1909
Nov-24	*	*	*	*	*	*
Dec-24	*	*	*	*	*	*
Jan-25	1/23/2025	3,039.62	837.33	0.00	125.99	4,002.94
Feb-25	*	*	*	*	*	*
Mar-25	3/20/2025	3,039.62	582.40	26.79	0.00	3,648.81
Apr-25	4/17/2025	1,519.81	291.20	13.24	337.83	2,162.08
May-25	5/28/2025	3,039.62	582.40	26.43	97.05	3,745.50
Jun-25	*	*	*	*	*	*
TOTAL		\$16,717.91	\$3,749.33	\$128.41	\$560.87	\$21,156.52



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Administration Report for May 2026

DATE: June 22, 2026

Activities

May 5th

- CLA Conference Planning Committee: Library Director
- Centennial Steering Committee: Assistant Library Director attended the meeting to receive updates on upcoming events. The committee was engaged and actively preparing for the Centennial 5K Run . The community has shown strong enthusiasm for the event. Event is on June 27, 2026. The race begins promptly at 7:30 a.m., with the starting line at Tri-City Park and the finish at Kraemer Memorial Park.

May 7th

- San Jose State University Asian American Native Hawaiian Pacific Islander Symposium: Library Director
- Meeting with Librarian, Tim Balen: Library Director

May 11th

- PLFF Board Meeting: Library Director
- Meeting with Solus: Library Director, Assistant Library Director, IT Consultant

May 12th

- SLS Executive Council Meeting: Library Director

May 13th

- IT Manager Interviews: Library Director

May 15th

- Graduation Reception for MLIS candidate: Library Director, Assistant Library Director, Business Manager

May 19th

- CLA Conference Planning Committee: Library Director

May 21st

- Library Impact Fee Meeting: Business Manager met with the City of Placentia's Director of Development Services to discuss library impact fees and upcoming projects.

May 26th

- Library Board Meeting: Administration Team

May 27th

- All Staff Meeting

May 31st

- George Takei, One Book, One Coast Event @ East Los Angeles Branch Library: Library Director

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Jeanette Contreras, Library Director

FROM: Yesenia Baltierra, Assistant Library Director

SUBJECT: Circulation Activity Report for May 2026

DATE: June 22, 2026

Children's Circulation - Subtotals	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Children's Fiction Physical: PLD	8,193	8,398	106,954	100,149	7%
Children's Fiction Physical: Bookmobile**	124		653		
Children's Fiction Digital	1,007	1,269	12,622	14,200	-11%
Children's Fiction Physical Subtotal	8,317	8,398	107,607	101,533	6%
Children's Fiction Digital Subtotal	1,007	1,269	12,622	14,200	-11%
Children's Fiction TOTAL	9,324	9,667	120,229	115,733	4%
Children's Nonfiction Physical: PLD	2,291	2,193	27,655	28,209	-2%
Children's Nonfiction Physical: Bookmobile**	4		9		
Children's Nonfiction Digital	84	96	1,032	1,299	-21%
Children's Nonfiction Physical Subtotal	2,295	2,193	27,664	28,209	-2%
Children's Nonfiction Digital Subtotal	84	96	1,032	1,299	-21%
Children's Nonfiction TOTAL	2,379	2,289	28,696	29,508	-3%
Children's Magazine Digital^^	29	65	276	348	-21%
Children's Magazine TOTAL	29	65	276	348	-21%
Children's Audiobook Physical: PLD	896	905	11,119	10,354	7%
Children's Audiobook Physical: Bookmobile**	0		1		
Children's Audiobook Digital	695	805	8,149	9,273	-12%
Children's Music Digital	1	8	25	76	-67%
Children's Audio Media Physical Subtotal	896	905	11,120	10,354	7%
Children's Audio Media Digital Subtotal	696	813	8,174	9,349	-13%
Children's Audio Media TOTAL	1,592	1,734	19,294	19,771	-2%
Children's Visual Media Physical: PLD	185	224	3,068	3,386	-9%
Children's Visual Media Physical: Bookmobile**	0		2		
Children's Visual Media Digital	37	69	395	780	-49%
Children's Visual Media Physical Subtotal	185	224	3,070	3,386	-9%
Children's Visual Media Digital Subtotal	37	69	395	780	-49%
Children's Visual Media TOTAL	222	293	3,465	4,166	-17%
Children's Library of Things (LOTs): PLD	28	62	341	396	-14%
Children's Library of Things (LOTs): Bookmobile**	0		0		
Children's Library of Things (LOTs) TOTAL	28	62	341	396	-14%

Children's Circulation - TOTAL	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
TOTAL All Children's Physical Content: PLD	11,593	11,782	149,137	142,494	5%
TOTAL All Children's Physical Content: Bookmobile	128		665		
TOTAL All Children's Physical Content	11,721	11,782	149,802	142,494	5%
TOTAL All Children's Digital Content	1,853	2,312	22,499	25,976	-13%
TOTAL All Children's Content	13,702	14,094	172,966	168,470	3%

Children's Circulation: Non-English Materials	May	May	FY-T-D	FY-T-D	FY-T-D
<i>*These stats are accounted for in the sections above, and are additionally highlighted as special collections</i>	2026	2025	2025-26	2024-25	% change
Children's Non-English Language Materials*	560	663	12,050	8,309	45%

Teen Circulation - Subtotals	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Teen Fiction Physical: PLD	287	220	3,000	3,111	-4%
Teen Fiction Physical: Bookmobile	3		3		
Teen Fiction Digital^^	428	512	4,729	5,477	-14%
Teen Fiction Subtotal	718	732	7,732	8,588	-10%
Teen Nonfiction Physical: PLD**	13	0	212		
Teen Nonfiction Physical: Bookmobile**	0		0		
Teen Nonfiction Digital	21	20	208	234	-11%
Teen Nonfiction Subtotal	34	20	420	234	79%
Teen Audiobook Physical: Bookmobile**	0		0		
Teen Audiobook Digital	545	573	6,221	6,203	0%
Teen Audio Media Subtotal	545	573	6,221	6,203	0%

Teen Circulation - TOTAL	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Teen Physical Content: PLD	300	220	3,212	3,111	3%
Teen Physical Content: Bookmobile	0		0		
TOTAL All Teen Physical Content	300	220	3,212	3,111	3%
Teen Digital Content	994	1,105	11,158	11,937	-7%
TOTAL All Teen Content	1,294	1,325	14,370	15,048	-5%

Adult Circulation - Subtotals	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Adult Fiction Physical: PLD	2,611	2,397	28,629	24,972	15%
Adult Fiction Physical: Bookmobile**	5		9		
Adult Fiction Digital	2,956	3,499	33,551	38,697	-13%

Adult Fiction Subtotal	5,572	5,896	62,189	63,669	-2%
Adult Nonfiction Physical: PLD	1,045	1,427	13,788	15,308	-10%
Adult Nonfiction Physical: Bookmobile**	0		13		
Adult Nonfiction Digital	709	1,087	8,479	10,835	-22%
Adult Non-Fiction Subtotal	1,754	2,514	22,280	26,143	-15%
Adult Magazine Digital	1,029	1,128	11,373	9,669	18%
Adult Magazine Subtotal	1,029	1,128	11,373	9,669	18%
Adult Audiobook Physical: PLD	25	94	619	1,029	-40%
Adult Audiobook Physical: Bookmobile**	0		0		
Adult Audiobook Digital	6,657	7,119	73,886	74,220	0%
Adult Music Physical	43	100	628	1,227	-49%
Adult Music Digital	27	93	597	834	-28%
Adult Audio Media Subtotal	6,752	7,406	75,730	77,310	-2%
Adult Movies and BluRays Physical: PLD	282	457	4,356	5,749	-24%
Adult Movies and BluRays Physical: Bookmobile**	0		0		
Adult Video Games Physical	358	291	4,092	3,931	4%
Adult Visual Media Physical TOTAL	640	748	640	748	-14%
Adult Visual Media Digital	208	688	208	688	-70%
Adult Visual Media Subtotal	848	1,436	848	1,436	-41%
Adult Library of Things (LOTs): PLD	103	105	1,022	1,049	-3%
Adult Library of Things (LOTs): Bookmobile**	0		12		
State Parks Pass: PLD	89	62	844	611	38%
Total Adult Library of Things (LOTs)	192	167	1,878	1,660	13%

Adult Circulation - TOTAL	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Adult Physical Content: PLD	4,556	4,933	53,978	53,876	0%
Adult Physical Content: Bookmobile	5		34		
TOTAL ALL Adult Physical Content	4,561	4,933	54,012	53,876	0%
Adult Digital Content	11,586	13,614	130,627	140,066	-7%
TOTAL All Adult Content	16,147	18,547	184,639	193,942	-5%

Adult Circulation: Non-English Materials	May	May	FY-T-D	FY-T-D	FY-T-D
<i>*These stats are accounted for in the sections above, and are additionally highlighted as special collections</i>	2026	2025	2025-26	2024-25	% change
Adult Non-English Language Materials*	78	138	1,356	1,249	9%

All Circulation - TOTAL	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Total Circulation Physical: PLD^^	16,449	16,935	206,327	199,481	3%
Total Circulation Physical: Bookmobile**	134		702		

Total Circulation Digital^^	14,433	17,031	164,284	177,979	-8%
Total All Circulation^^	31,016	33,966	371,313	377,460	-2%

Online Database Usage	May	May	FY-T-D	FY-T-D	FY-T-D
<i>Funded by Placentia Library District</i>	2026	2025	2025-26	2024-25	% change
ABC Mouse	3,074	455	31,363	17,822	76%
Novelist Plus	57	140	621	1,703	-64%
Novelist Select	1,358	2,172	18,008	25,280	-29%
Scholastic Teachables	64	23	957	939	2%
TOTAL PLD DATABASE USAGE	4,553	3,996	50,949	62,462	-18%

Online Database Usage	May	May	FY-T-D	FY-T-D	FY-T-D
<i>Funded by California State Library</i>	2026	2025	2025-26	2024-25	% change
Britannica	7	15	226	443	-49%
ProQuest	0	26	69	88	-22%
ProQuest Culture Grams	3	3	40	36	11%
Teaching Books for Libraries	585	326	3,692	4,484	-18%
National Geographic Kids (Gale)	0	0	64	102	-37%
Gale in Context: Environmental Studies	0	0	5	11	-55%
Gale Interactive: Science	0	29	64	87	-26%
Alexander Street^	0	0	4	7	-43%
PebbleGo Science K-2	8	3	36	23	57%
TOTAL CSL DATABASE USAGE	603	402	4,200	5,842	-28%
TOTAL ALL DATABASE USAGE	5,156	4,398	55,149	68,304	-19%

**New statistic for FY 25-26

^Mathematically, division by zero is invalid

^^Formula revised to reflect correct data for FY2024-2025

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**TO:** Jeanette Contreras, Library Director**FROM:** Yesenia Baltierra, Assistant Library Director**SUBJECT:** Children's Services Report for May 2026**DATE:** June 22, 2026

Number of Programs by Type	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Storytime	7	14	73	100	-27%
Children's Programs	5	6	69	91	-24%
Hangar	6	3	49	26	88%
Teen Programs	2	2	21	26	-19%
Self-Directed	3	3	46	34	35%
Outreach	6	3	38	32	19%
TOTAL Children/Teen	29	31	296	309	-4%

Program Attendance by Type	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Storytime	344	684	3,752	4,515	-17%
Children's Programs	291	491	6,010	6,026	0%
Hangar	101	49	578	349	66%
Teen Programs	16	8	222	165	35%
Self-Directed	51	44	1,697	1,695	0%
Outreach	26	344	2,641	1,948	36%
TOTAL Children/Teen	829	1,620	14,900	14,698	1%

The Hangar Makerspace	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Hangar Activity Hour Visits	343	321	3,606	2,454	47%

ACHIEVEMENTS

- Daisy Badge planned and conducted Baby Giggles and Wiggles on May 1 and 15.
- Daisy Badge facilitated Morning Meetups on May 1 and 15.
- Daisy Badge planned and conducted Family Storytime on May 9.
- Daisy Badge led the library presentation for 3rd Grade Visits on May 7.
- Daisy Badge and Mayli Apontti were panelists for the Fall Children's Intern Interview on May 12.

- Daisy Badge planned and facilitated the Taiko Drumming Celebration Program with Hanabi Taiko as part of One Book, One Coast on May 23.
- Mayli Apontti facilitated Read to the Dogs on Monday, May 4.
- Mayli Apontti planned and conducted Family Storytime on May 2, 16, and 30.
- Mayli Apontti planned and conducted Baby Giggles and Wiggles on May 8 and 22.
- Mayli Apontti facilitated Morning Meetups on May 8 and 22.
- Mayli Apontti led the library presentation for 3rd Grade Visits on May 28.
- Alex Aguirre planned and conducted PTAC on May 7 and 21.
- Alex Aguirre planned and set up crafts for the Hangar for the month of May.
- Alex Aguirre coordinated tasks for Venture Academy volunteer on April 6, 13, and 20.
- Alex Aguirre led the Bookmobile presentation for 3rd Grade Visits on May 7 and 28
- Alex Aguirre and Sally Federman conducted outreach with the bookmobile at LOT 318 Cypress on May 20.
- Alex Aguirre and Tim Balen planned and facilitated The Superhero in Reel-Time: Comic Drawing Workshop.
- Damean Sanz and Joy Ellis conducted outreach with the bookmobile at Kraemer Park for the LOT 318 Good Life Celebration on May 2.
- Damean Sanz and Yomara Solis conducted outreach with the bookmobile at LOT 318 Cypress, Lot 318 Gomez on May 5,13, and 27.
- Damean Sanz and Sally Fenderman conducted outreach with the bookmobile at the Whitten Center on May 26.

MEETINGS

- May 4, Margaret Hatanaka attended the Children's Services SLS Committee meeting in Irvine, CA. Locations for the next committee meetings, OC Performer's 2027 Showcase budget and assignments, and plans for 2026 Summer Reading programs were discussed.
- May 5, Daisy Badge attended the Lunch at the Library Community of Practice #4 meeting where presentations on programs, partnerships, and lessons learned were given.
- May 6, Margaret Hatanaka attended the City/Library meeting where Police discussed upcoming fundraising efforts, library shared the change in Summer Reading Lunch at the Library performances to Fridays vs. Wednesdays and invitation issued for Police, Fire and Public Works to attend the Library's Build a Backpack event on July 11.
- Alex Aguirre attended the Teen SLS meeting at Fullerton Public Library on Wednesday, May 20 to discuss Spring programming and upcoming summer programming.

PROFESSIONAL DEVELOPMENT

- None

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Jeanette Contreras, Library Director

FROM: Yesenia Baltierra, Assistant Library Director

SUBJECT: Adult Services Report for May 2026

DATE: June 22, 2026

MONTHLY STATISTICS

Number of Programs by Type	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Adult Programs	11	8	44	32	38%
History Room	2	4	8	8	0%
Literacy	36	36	367	373	-2%
General Interest	1	1	4	3	33%
Self-Directed	1	2	21	13	62%
TOTAL Adult	51	51	444	429	3%

Program Attendance by Type	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Adult Programs	128	80	410	358	15%
History Room	141	332	514	634	-19%
Literacy	352	289	3,161	3,205	-1%
General Interest	90	0	655	58	1,029%
Self-Directed	35	77	913	631	45%
TOTAL Adult	746	778	5,653	4,886	16%

History Room Activity	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
History Room Visitors	25	1	62	38	63%
Memory Lab Appointments	18	10	115	102	13%

Volunteer Hours	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
History Room	0	0	0	2,709	-100%
PLFF	251.1	247.75	2,309	1,185	95%
General Library	89.57	83.25	1,286	3,566	-64%
Adult Literacy	316.25	402	4,020	3,885	3%
PTAC	23.53	11	361	8,618	-96%
Teen Volunteers	138.25	215.18	8,874	8,822	-96%
Total Volunteer Hours	680.45	744	7,975.63	19,963.23	-60%
FTE Equivalent	3.93	4.29	46.01	115.17	-60%

Literacy	FY-T-D	FY-T-D	FY-T-D
	2025-26	2024-25	% change
Adult Literacy Students	39	31	26%
Adult ESL Students	48	89	-46%
Adult Literacy Tutors	41	37	11%
Adult ESL Tutors	44	82	-46%

ACHIEVEMENTS

- Ruchika Sharda facilitated Literacy Reads – Beg. Book Club on May 6, 13, 20, 27.
- Sally Federman facilitated Literacy Reads – Int. Book Club on May 5, 12, 19.
- Ruchika Sharda coordinated Read, Write, Speak Club on May 1, 8, 15, 22, 29.
- Laurel Dennis and Jullie Bence facilitated ESL Conversation Class at the Whitten Center Tuesdays and Thursdays on May 5, 7, 12, 14, 19, 26.
- Laurel Dennis and Ruchika Sharda facilitated ESL Conversation Class at PLD Tuesday afternoons and Thursday mornings on May 5, 7, 12, 14, 19, 21, 26, 28.
- Sally Federman facilitated Citizenship class on May 7, 14, 21, 28.
- Sally Federman facilitated a Beginner Book Club at the Whitten Center on May 6, 13, 20.
- Sally Federman, Laurel Dennis, Ruchika Sharda, Jullie Bence and Amanda Lee facilitated the Literacy Recognition Evening on May 8.
- Sally Federman coordinated Painting with Mehrdad on May 28.
- Sally Federman and Jullie Bence facilitated a Learner Discussion at the Whitten Center on 5/21.
- Sally Federman joined Damian on the Bookmobile to the Whitten Center on 5/26.
- Tim Balen coordinated the Science Fiction, Fantasy & Graphic Novel Book Club, held as part of One Book, One Coast, on May 14.
- Tim Balen coordinated Yoga at the Library on May 2, 16 and 30.

- Tim Balen coordinated Meditation at the Library on May 5 and 12.
- Tim Balen coordinated Upcycled Origami Workshop, held as part of One Book, One Coast, on May 28.
- Tim Balen presented at the All-Staff Meeting to provide a staff guide on Beanstack and the Summer Reading Program on May 27.
- Tim Balen coordinated AV/sound/technology setup for the Literacy Recognition event on May 8.
- Tim Balen coordinated the 2026 Reading Program: Your Next Chapter in May.
- Tim Balen coordinated setup of the 2026 Reading Program: Plant a Seed, Read in May.
- Tim Balen coordinated setup and promotion of the American Red Cross Blood Drive, collaborating with City of Placentia and American Red Cross staff in May, to prepare for the blood drive set to be held in the Placentia Library's Community Meeting Room in June.
- Tim Balen coordinated the completion and evaluation of the library's three Spring 2026 interns in May. The interns were an Adult Services Intern, a Marketing Intern and a Technical Services Intern.
- Tim Balen coordinated setup and updates for adult volunteers, in collaboration with the Placentia Library Friends Foundation, in May.
- Natalie McCard held Adult Book Club on May 12.
- Natalie McCard coordinated 3rd grade civic center tours for Sierra Vista and Ruby Drive Elementary Schools on May 7 and 28.
- Natalie McCard hosted Get Hooked! Crochet and Knitting Circle on May 23 in the Community Meeting Room.
- Natalie McCard held Adult Craft Night in the OLE on May 28.
- Natalie McCard assisted Tim Balen in hosting Yoga and Meditation at the Library on May 9, 19, and 23.

MEETINGS

- On May 11, Natalie McCard met with members of the Placentia Historical Committee to discuss the upcoming July 2026 historical lecture focused on notable women in Placentia's history.
- On May 4, Tim Balen interviewed a prospective Fall 2026 Marketing Intern applicant.
- On May 12, Tim Balen and Daisy Badge and Mayli Apontti interviewed a prospective Fall 2026 Children's Services intern applicant.
- On May 18, Tim Balen and Natalie McCard interviewed a prospective Fall 2026 History Room intern applicant.
- On May 18, Tim Balen met with a Spring 2026 Technical Services Intern to provide an overview of the Placentia Library District's stats, reports, program and collection budgets and allocations, and grants.

- On May 28, Tim Balen met with a Spring 2026 Technical Services intern to provide an end-of-internship wrap-up meeting and evaluation.
- On May 12, Michelle Meades attended the Adult Services/Local History SLS meeting in Newport Beach. We discussed upcoming programs.

PROFESSIONAL DEVELOPMENT

- On May 6, 2026, Natalie McCard attended a webinar hosted by California Libraries Learn titled “Get Smart About Emotional Intelligence”, led by career nurse Lauren Greco. The webinar was put on with the intention of helping library staff members more effectively use emotional intelligence skills to provide better customer service. Greco presented the 4 domains of “EI” (emotional intelligence), which are: self-awareness, self-management, social awareness, and social management. Each of the domains can be learned and developed through practice and can lead to higher emotional intelligence. Greco advocated for library staff to actively listen to patrons and coworkers, embrace their flaws or difficulties as a means of developing more self-awareness, and to seek out novel experiences, all of which can assist in advancing emotional intelligence. She cited psychological studies which state individuals with higher emotional intelligence are more independent, move forward in their careers rather than stagnating, and can create positive, healthy work environments.
- On May 20, 2026, Natalie McCard attended a webinar hosted by California Libraries Learn titled “Cataloging for Non-Catalogers” which intends to make cataloging terminology more understandable to non-cataloging library staff members. The webinar was a refresher on the basics of cataloging and MARC (Machine Readable Cataloging) record formatting and management in an ILS. This webinar was a helpful refresher on the format of MARC records, how they function within an integrated library system, and what each line of a MARC record conveys in terms of metadata.

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Jeanette Contreras, Library Director

FROM: Yesenia Baltierra, Assistant Library Director

SUBJECT: Technology and Website Report for May 2026

DATE: June 22, 2026

MONTHLY STATISTICS

Computer and Wi-Fi Usage	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Children Computer Usage	248	222	2,969	3,543	-16%
Children AWE Learning Usage	387	456	6,533	4,461	46%
Teen Computer Usage	29	45	478	889	-46%
Adult Computer Usage	895	906	10,806	10,012	8%
Total Computer Usage	1,559	1,629	20,786	18,905	10%
Wi-Fi Usage	1,998	1789	20,303	17,651	15%
Guest Passes	110	75	898	826	9%

Website Traffic	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Website visits	16,769	18,669	271,382	209,941	29%
Page Hits	28,150	37,609	385,724	346,744	11%
Users	12,642	13,342	218,200	153,353	42%
Placentia Library Online Catalog Usage	5,904	2,910	54,237	31,672	71%

App Usage	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
App Downloads	71	70	884	715	24%
App Launches	2,728	1,539	25,840	15,934	62%
Searches	2,110	3,940	29,500	100,393	-71%
Requests Placed	476	241	4,543	2,287	99%
Renewals Done	775	407	8,316	4,778	74%
App Catalog Usage	2,586	4,588	34,043	104,515	-67%

Technology Updates

- Self-Registration / Online Applications (PM): Continued monitoring and project management in preparation for public rollout; completed launch-stage follow-ups and requirements tracking to support a stable expansion.
- BLUEcloud Circulation (BC) Readiness: Advanced configuration and testing to expand BC as a resilient backup workflow for front desk operations; drafted a staff-facing BC SOP and enabled access for additional staff groups (including bookmobile and literacy) to support continuity.
- Business Continuity / Front Desk Resilience: Drafted a comprehensive front desk technology SOP (business continuity/disaster recovery) to standardize response during Citrix/Horizon disruptions and reduce service interruptions.
- Citrix/Horizon Outage Response: Supported a significant Citrix disruption with workarounds and ongoing recovery coordination to restore stability and reduce repeat impact.
- Bookmobile Operations Support: Ongoing bookmobile support for self-check and printing workflows; addressed Horizon borrower-type/technical setting conflicts and coordinated vendor follow-ups as issues continue to evolve.
- Infrastructure & Security Operations: Completed routine endpoint/server security patching and maintenance; continued reliability improvements through device maintenance and targeted operational cleanup.
- Automation & Data Controls: Implemented automated borrower-type updates by age (J → YA → Adult) to improve data accuracy and reduce manual corrections; continued work on reporting automation to improve board report accuracy and reduce rework.
- Planning & Fiscal Readiness: Continued E-Rate project management and FY26–27 budget preparation; initiated patron purge project management planning to support long-term data hygiene and system performance.

Summary

Over the past several weeks, Technology has focused on maintaining stable daily operations while advancing multiple high-impact initiatives that improve service continuity and operational efficiency. A major priority was strengthening the library's resiliency during Citrix/Horizon disruptions by expanding BLUEcloud Circulation readiness and drafting a comprehensive front desk business continuity SOP. This work is designed to reduce service interruptions, standardize staff response, and improve reliability during system instability.

At the same time, the department continued active project management for Self-Registration/Online Applications in preparation for broader public rollout, while supporting ongoing bookmobile operational needs where system settings and workflow requirements continue to change. Security patching and routine infrastructure maintenance remained steady, and internal controls were strengthened through automation work (including automated borrower-type updates by age) and continued reporting automation efforts. In parallel, the team progressed planning work for E-Rate and FY26–27 budget preparation and began structured planning for patron account purge activities to support long-term data accuracy and system hygiene.

Upcoming Items / Next Steps

- Self-Registration Public Rollout: Continue readiness work and monitoring as the project moves into broader public-facing use.
- BLUEcloud Expansion & Training: Continue staff training and controlled expansion of BC usage (including permissions/overrides planning) to support reliable backup circulation operations.
- Bookmobile Stabilization: Align operational direction and reduce rework by clarifying borrower-type and workflow requirements; continue vendor coordination to resolve recurring issues.
- Board Report Data Quality Improvement: Continue custom reporting automation and validation steps to improve accuracy, reduce manual handling, and prevent formula drift.
- FY26–27 Planning: Complete budget preparation and align technology priorities with fiscal year goals; continue E-Rate planning activities.
- Patron Purge Project Planning: Confirm policy direction, scope, and communication approach; develop an implementation plan that reduces risk and improves data quality.

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Jeanette Contreras, Library Director

FROM: Yesenia Baltierra, Assistant Library Director

SUBJECT: Customer Service Report for May 2026

DATE: June 22, 2026

Attendance	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Number of Days Open	30	30	317	295	7%
Number of Hours Open	265	272	2,892	2,687	8%
Attendance	20,840	20,570	227,634	213,346	7%

Card Holders	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Child Card Holders	17,261	16,468	186,152	160,700	5%
Teen Card Holders	4,915	4,790	53,545	47,465	3%
Adult Card Holders	56,743	52,071	550,739	503,233	9%
Total Card Holders	78,919	73,329	790,436	711,398	8%
New Patron Registration	310	499	5,270	4,585	15%
New Virtual Library Cards	24	168	2,074	1,400	48%

Information Desk Activity	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Reference Questions -- in person	2,149	2,158	26,308	21,900	20%
Reference Questions -- telephone	579	493	5,989	5,801	3%
Reference Questions -- email/chat	10	1	59	66	-11%
Total Reference Questions	2,738	2,652	32,356	27,767	17%
Study Room Usage	234	202	2,601	2,377	9%
PODs	197	134	2,044	895	128%
OLE Space*	1,620		7,615		

*New Data FY25/26

Passport Activity	May	May	FY-T-D	FY-T-D	FY-T-D
	2026	2025	2025-26	2024-25	% change
Passports Processed	412	583	4,369	5,461	-20%
Photos Processed	272	393	3,079	3,932	-22%

ACTIVITIES

- Angie and Iesu processed 523 new books.
- Yomara mailed 60 billing notices.
- Meeting room was used by 4 outside renters: Greentree HOA, Broadmoor HOA, Corte Vista HOA and Shannon Grimsely.
- Meeting Room was used 39 times for library related activities/programs.
- Meeting Room was used by 2 library partners: Kiwanis and Placentia Library Friends Foundation.
- Staff filled 464 requests from the pull list.
- Staff pulled 158 expired holds from the request shelf.

MEETINGS

- None

PROFESSIONAL DEVELOPMENT

- None

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Review of Draft Municipal Service Review Prepared by the Orange County Local Agency Formation Commission.

DATE: June 22, 2026

BACKGROUND

The Orange County Local Agency Formation Commission (OC LAFCO) recently completed the North Orange County Municipal Service Review (MSR), a comprehensive evaluation of local agencies and service providers within the region. Municipal Service Reviews are conducted pursuant to California Government Code Section 56430 and are intended to assess the adequacy, efficiency, governance, and financial capacity of public agencies in providing services to their communities.

The Placentia Library District was included in the review as an independent special district providing public library services to the residents of Placentia. The MSR was distributed for a 30-day public review starting on June 3, 2026, and ending on July 6, 2026, with a public hearing scheduled for July 8, 2026 during the Commission's regular meeting. The Commission's regular meeting on Wednesday, July 8, 2026, has been canceled. Therefore, the public hearing for the North MSR Region was rescheduled to August 12, 2026, during the Commission's regular meeting.

Board members are encouraged to review the portions of the report specifically related to the Placentia Library District, including pages 103-104, 110, 123-124, 127, and 129.

Financial Condition and Service Sustainability

The Municipal Service Review identifies the Placentia Library District as financially stable and well-positioned to continue meeting the service needs of the community. Of particular note, the District received a "High" rating for Revenue and Reserve Indicators.

This rating reflects the District's strong financial position, including healthy reserve levels, consistent revenue generation, prudent fiscal management, and the ability to maintain operational stability during economic fluctuations. The report notes that the District maintains adequate financial resources to support ongoing operations, capital needs, and future service demands.

LAFCO's consultant, RSG further concluded that the District possesses sufficient financial ability to meet current service obligations and anticipated future community needs, indicating that the District's financial structure and long-term planning practices provide a solid foundation for continued service delivery.

Governance and Accountability

The Municipal Service Review also highlighted the District's commitment to transparency, accountability, and good governance practices. RSG determined that the Placentia Library District has demonstrated strong governance compliance and accountability practices, noting that Board agendas, meeting materials, and meeting minutes are publicly accessible and readily available to the community. These practices support transparency, public participation, and informed decision-making. The report further states that

no governance instability or operational concerns were identified during the review process. This finding reflects the District's adherence to statutory requirements, established policies, and sound administrative practices that support effective organizational management.

Service Delivery

The Municipal Service Review found that the District continues to effectively provide library services to the community and maintains the organizational and financial capacity necessary to sustain those services. The report did not identify any significant deficiencies, service gaps, or operational concerns requiring corrective action. The findings reinforce the District's ongoing efforts to responsibly manage public resources while maintaining high-quality library services, educational programming, technology access, literacy initiatives, and community engagement opportunities for residents.

The North Orange County Municipal Service Review provides an independent assessment of the Placentia Library District's operations, governance, and financial condition. The report's findings affirm that the District is financially stable, maintains strong reserves, demonstrates sound governance practices, and possesses the capacity to continue meeting the library service needs of the community both now and into the foreseeable future.

Attachment A is the draft Municipal Service Review (MSR) – Orange County LAFCO

RECOMMENDATION

Receive and review the draft Municipal Service Review (MSR) prepared by the Orange County Local Agency Formation Commission (LAFCO) and provide comments or directions to staff, as appropriate.



Local Agency Formation Commission of Orange County

2677 North Main Street, Suite 1050
Santa Ana, CA 92705

Municipal Service Review and Sphere of Influence Update

North Region

Public Review Draft

June 3, 2026

Prepared for the
Local Agency Formation Commission of Orange County
By RSG, Inc.



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LIST OF ABBREVIATIONS USED

ACS	American Community Survey
ADU	Accessory Dwelling Unit
ALS	Advanced Life Support
CAGR	Compound Annual Growth Rate
CCTV	Closed-Circuit Television
CFPD	Consolidated Fire Protection District
CIP	Capital Improvement Program
CKH	Cortese-Knox-Hertzberg Reorganization Act of 2000
CPUC	California Public Utilities Commission
DOF	Department of Finance
DUC	Disadvantaged Unincorporated Communities
EAS	Emergency Ambulance Service Inc.
FOG	Fats-Oils-Grease
FTE	Full-Time Equivalents
FY	Fiscal Year
GASB	Government Accounting Standards Board
GIS	Geographic Information Systems
GRC	General Rate Case
GSWC	Golden State Water Company
HCD	California Department of Housing and Community Development
JPA	Joint Powers Authority
LAFCO	Local Agency Formation Commission
MGD	Million Gallons per Day
MHI	Median Household Income
MPAH	Major Pavement Arterial Highways
MSR	Municipal Service Review
MWDOC	Municipal Water District of Orange County
OC	Orange County
OCFA	Orange County Fire Authority
OCPL	Orange County Public Libraries
OCWD	Orange County Water District
OCTA	Orange County Transportation Authority

OPEB	Other Post-Employment Benefits
PARC	Park Arts and Recreation Commission
PCI	Pavement Condition Index
PMP	Pavement Management Plan
PRMP	Parks and Recreation Master Plan
RHNA	Regional Housing Needs Allocation
RMRA	Road Maintenance and Rehabilitation Account
RSG	RSG, Inc
SBITA	Subscription-Based Information Technology Arrangements
SCA	Sweeping Corporation of America Inc.
SCE	Southern California Edison
SMP	Sewer Management Plan
SOI	Sphere of Influence
UAL	Unfunded Actuarial Liability
UWMP	Urban Water Management Plan
YLWD	Yorba Linda Water District

I. EXECUTIVE SUMMARY

INTRODUCTION

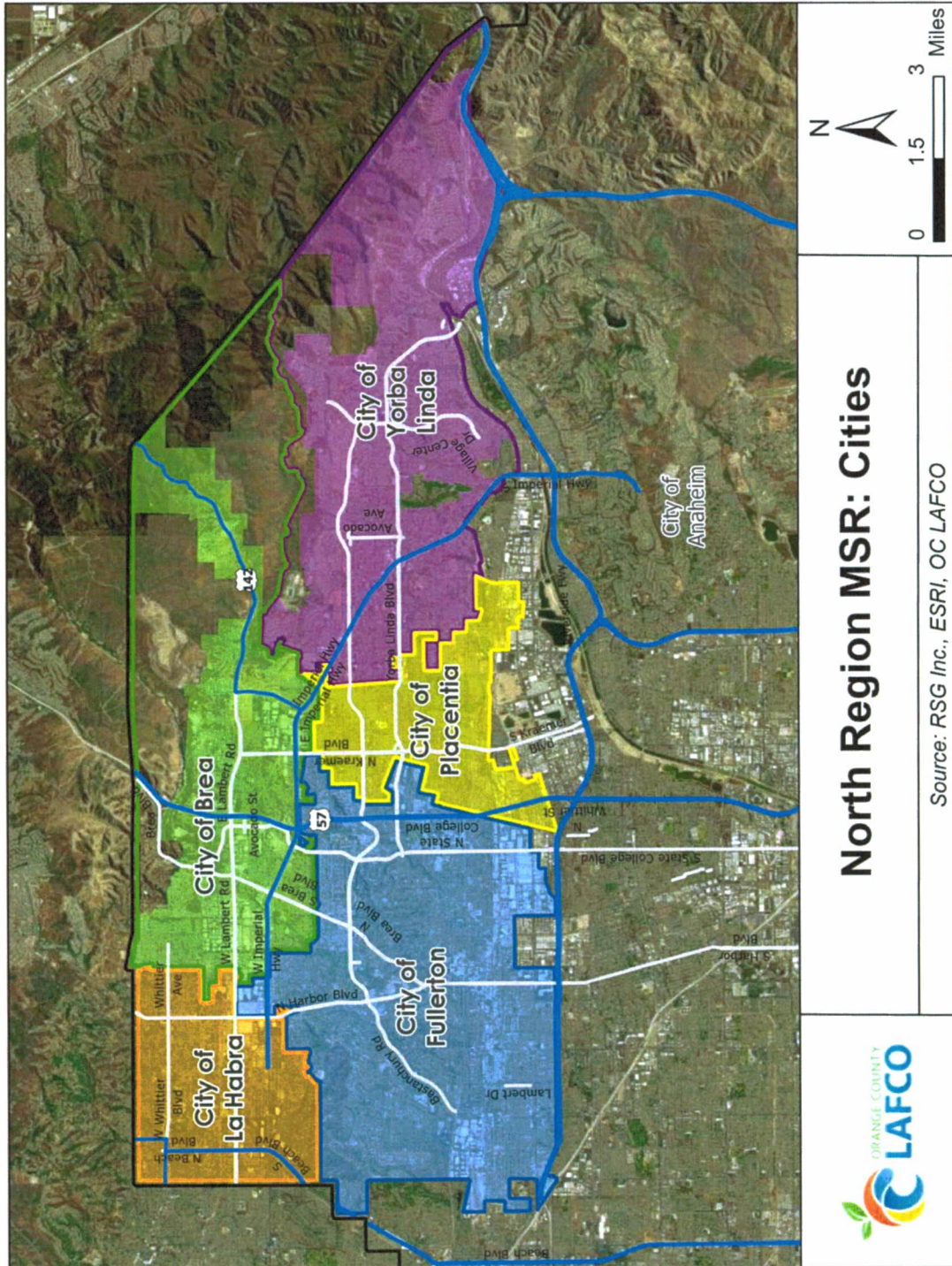
The Local Agency Formation Commission of Orange County (“OC LAFCO”) initiated this Municipal Service Review (“MSR”) and Sphere of Influence (“SOI”) update in 2025 for five (5) cities and two (2) special districts in the OC LAFCO-designated “North Region” of the County. OC LAFCO retained consultant RSG, Inc. (“RSG”) to prepare the MSR, which included conducting surveys and interviews with each of the agencies in the region, and collecting demographic, fiscal, and other data to support the MSR findings and determinations under State law. OC LAFCO also retained Berkson Associates (“Berkson”) to perform an analysis of available financial data and prepare a set of Fiscal Indicators to be published on the OC LAFCO website.

NORTH REGION CITIES AND SPECIAL DISTRICTS REVIEWED

The OC LAFCO North Region consists of seven (7) agencies (the “North Region Agencies”) located in the north and northeastern part of Orange County, which is generally north of State Route 91. The seven (7) agencies are listed in Table 1 and the cities of the North Region are depicted in a map on the following page.

Table 1: North Region Agencies

Cities	Special Districts
Brea	Placentia Library District
Fullerton	Yorba Linda Water District
La Habra	
Placentia	
Yorba Linda	



MSR DETERMINATIONS SUMMARY

As further detailed in the body of this report, RSG makes the following MSR determinations for the North Region Agencies based on our data collection, surveys, and interviews:

1. Population, Growth, and Housing

The population and number of housing units for agencies in the North Region are expected to grow slowly over the next five years. Agencies are planning for incremental population through their general plans, housing elements, and other planning documents. The cited limited growth is largely attributed to the existing buildout and the geography of the region.

2. Disadvantaged Unincorporated Communities

While there is a total of 8 OC LAFCO-designated disadvantaged unincorporated communities (“DUCs”) in Orange County, none are located within or contiguous to the boundaries or the Sphere of Influences (“SOIs”) of the agencies in the North Region.

3. Capacity of Facilities and Adequacy of Services

The agencies within the North Region are providing adequate law enforcement, fire, water, wastewater, public works, parks and recreation, library, animal control, road maintenance, and code enforcement services to their residents and customers. Agencies serving the region have the resources to maintain current levels of service and to meet expected demands in the future. One exception, however, is the significant capital costs for road maintenance which may pose a challenge in meeting the necessary improvements if careful planning is not maintained.

In addition, the agencies in the North Region—apart from the Placentia Library District¹—also have aging water and wastewater infrastructure requiring improvements

¹ The Placentia Library District does not maintain street, water, or wastewater infrastructure and, therefore, is not subject to these infrastructure-related considerations.

and/or replacements in the coming years. This is particularly the case for the cities of Fullerton and La Habra, who maintain the oldest water and wastewater infrastructure among the regional agencies. However, based on RSG's review, all of the agencies maintain and regularly update their Pavement Management Plans, CIPs, and associated budgets to support necessary improvements to streets, water, and wastewater infrastructure.

4. Financial Ability to Provide Services

The financial capacity of the North Region Agencies is adequate for maintaining current service levels, although there are certain fiscal challenges facing the region in the future. Specifically, agencies are experiencing increasing costs for public safety, and significant capital improvement costs for roads, water, and wastewater infrastructure. In addition, the cities of Fullerton and Placentia expressed concerns regarding their ability to recruit and retain staff due to competitive salary disadvantages compared to neighboring agencies. The City of La Habra also expressed concerns regarding the increasing costs to contract fire protection services with the Los Angeles County Consolidated Fire Protection District ("CFPD").

OC LAFCO's fiscal indicators and RSG's analysis indicate that the agencies in the North Region are reporting high or moderate revenue growth, with varied expenditure growth and reserve balances. Additionally, all agencies maintain healthy fund balances and reported net surpluses in most of the recent years reviewed.

According to agency surveys and interviews, the City of Fullerton mentioned that in May 2025, the City Council directed staff to pursue two "Dedicated" 0.5% add-on sales tax measures for the November 2026 ballot—one for Streets and Infrastructure and one for Public Safety. If both pass, each is projected to raise about \$15 million annually (approximately \$30 million total) to support infrastructure and public safety and reduce pressure on the General Fund deficit. The City of La Habra has adopted Measure V in November 2024, a one-cent sales tax, to help address a budget shortfall and support public safety services. The measure is expected to generate approximately \$15.6

million per year in ongoing revenue. The City of Placentia is considering increasing the Transient Occupancy Tax (TOT) from 10% to potentially 14% to support revenue generation; however, no formal decision has been made yet on the new rate. The City of Yorba Linda is updating its fee study to reflect the FY25-26 budget, and they anticipated to complete the draft by April or May 2026. Further, all of the cities have adopted reserve policies, which they are able to meet on an ongoing basis. The Placentia Library District did not identify any new comparable special tax measures, revenue initiatives, or fee study updates during the survey and interview process. Placentia Library District's existing revenues consist of property taxes, passport services, and impact fees.

5. Opportunities for Shared Facilities

The agencies in the North Region did not express a need or desire for further shared facilities, nor did RSG identify additional opportunities for additional shared facilities during this review.

6. Accountability for Community Service Needs

Agencies in the North Region implement policies and procedures that ensure transparency and accountability to the public, including public notice of City Council and District Board meetings, actions, and regular elections. All agencies have websites and social media channels that provide information about their meetings, including ways to access the meetings virtually.

All cities in the North Region are general law cities, apart from the City of Placentia, which is a charter city. The cities of Placentia and Fullerton hold district elections whereas the cities of Brea, La Habra, and Yorba Linda hold at-large elections. Each city has a five-member City Council and appoints a mayor annually from among its members. Council members serve staggered, four-year terms, and all of the cities operate under the Council-Manager form of government. Most North Region cities do impose a two consecutive four-year term limits for council members, apart from the

City of Yorba Linda who imposes a maximum of three four-year term limits, and the City of La Habra who has not adopted a term limit.

The Placentia Library District is governed by a five-member Board of Trustees who are appointed by the County Board of Supervisors and serve four-year terms. The Yorba Linda Water District is governed by a five-member Board of Directors elected at-large and serve four-year terms.

7. Any Other Matter Related to Effective of Efficient Service Delivery, as Required by Commission Policy

No other matters were identified during the conducting of the North Region MSR.

SOI DETERMINATIONS SUMMARY AND RECOMMENDATIONS

RSG makes the following SOI determinations for the North Region agencies based on our data collection, surveys, and interviews:

1. Present and Planned Land Uses

Cities, special districts, and unincorporated areas within the North Region are largely built out with little remaining open space for development. The cities anticipate modest population growth and are planning for any increases in housing stock through their respective planning documents, including General Plans and Housing Elements.

Pursuant to Government Code Section 65302(c), general plans must include a housing element explaining how the jurisdiction will meet its allocation of the regional housing need. The cities are also required by State law to submit annual progress reports on their respective general plan and housing element by April 1 for the prior year. As of the date of this report, all of the cities have received certification of their 6th Round Housing Element from the California Department of Housing and Community Development ("HCD") and have submitted annual progress reports for 2024. Annual progress reports for 2025 were due April 1, 2026, and each city in North Region confirmed they submitted the report by/before this deadline.



2. Present and Probable Need for Facilities and Services

North Region agencies are currently providing adequate services and facilities to their residents and customers. Based on the information reviewed for this MSR, the agencies appear capable of continuing to provide these services at current levels in the near term.

While no immediate deficiencies in service delivery were identified, several agencies operate infrastructure that is aging and will require rehabilitation or replacement over time. Portions of the water and wastewater systems within the region are approaching the end of their useful life and will require ongoing capital investment to maintain service reliability. Similarly, roadway networks and related public infrastructure will require continued maintenance and periodic improvements.

The agencies have identified many of these infrastructure improvement needs through their respective Pavement Management Plans, Urban Water Management Plans, Master Plans and CIPs. Planned projects primarily involve rehabilitation, replacement, or modernization of existing facilities rather than expansion of service capacity. Agencies are generally planning and budgeting for these improvements to maintain service levels and address long-term infrastructure needs.

3. Present Capacity and Adequacy of Public Facilities and Services

The present capacity of the public facilities operated by the cities and special districts in the North Region are adequate to provide public services to their residents and customers.

The five cities and Yorba Linda Water District require significant capital improvements to their street, water, and wastewater infrastructure to meet projected demands. The cities are responsible for street, water, and wastewater infrastructure, while the Yorba Linda Water District is responsible for water and wastewater infrastructure only. Despite these challenges, all agencies in the North Region are budgeting and planning

accordingly to adhere to their scheduled improvements as documented in their respective planning files.

4. Social or Economic Communities of Interest

The North Region includes a limited number of unincorporated areas, predominately within the SOIs for the cities of Brea and Yorba Linda. These unincorporated areas receive municipal services primarily from Orange County, including but not limited to, fire protection, parks and recreation, planning, and community development.

5. Present and Probable Need for Public Facilities and Services by any DUCs within the Existing SOIs

There are no DUCs located within or contiguous to the SOIs for the agencies in the North Region.

SPHERE OF INFLUENCE UPDATES

During the course of this MSR, none of the agencies in the North Region expressed an interest in annexation, detachment, or other changes to their existing boundaries or spheres of influence. However, the City of Yorba Linda confirmed that while they have held prior discussions regarding annexation of the Fairlynn Island (please refer to the map on page 18 for more details), no formal action has been initiated to date. RSG recommends—in coordination with LAFCO—the City of Yorba Linda consider the merits of a future annexation of the Fairlynn Island area, subject to evaluation of service efficiency, infrastructure integration, and long-term planning considerations.

Separately, RSG identified an area within the Yorba Linda Water District's jurisdictional boundary meriting consideration for a future detachment and concurrent SOI amendment.

The area is situated south along Buena Vista Avenue with principal access via N Carew Drive in Placentia. The area comprises 11 parcels spanning approximately 2.5 acres in total. Based on information provided by OC LAFCO, this area was previously within the City of Yorba Linda's boundary and SOI. However, in the 1970s, the area was detached

from the City of Yorba Linda and annexed into the City of Placentia. Although the action appears to have anticipated that a concurrent detachment from the Yorba Linda Water District would also occur, LAFCO confirmed that a formal detachment never occurred. Subsequently, current records indicate the area remains within the District's boundary and SOI, despite the fact that the District neither provides nor plans to provide services; instead, the City of Placentia provides services to this area.

To address this inconsistency, RSG recommends the Yorba Linda Water District pursue a formal detachment through the submittal of a change of organization application with LAFCO. This detachment action would align the District's boundary and SOI with actual service provision and improve clarity for long-term service planning.

Existing and Proposed SOI Designations

Three cities and one district in the North Region have an SOI that is coterminous with their jurisdictional boundaries. The other two cities and one district in the region, have an SOI that expands beyond their jurisdictional boundary. Based on our review of the agencies' boundaries and existing spheres of influence, coupled with the feedback received from agencies during the interview, RSG proposes LAFCO proceed to reaffirm the SOIs for all of the agencies in the North Region, as detailed in Table 2 below.

Table 2: North Region Agencies SOIs

Agency	Existing SOI	Proposed SOI Update
City of Brea	Non-coterminous	Reaffirm SOI
City of Fullerton	Coterminous	Reaffirm SOI
City of La Habra	Coterminous	Reaffirm SOI
City of Placentia	Coterminous	Reaffirm SOI
City of Yorba Linda	Non-coterminous	Reaffirm SOI
Placentia Library District	Coterminous	Reaffirm SOI
Yorba Linda Water District	Non-coterminous	Reaffirm SOI

OTHER BOUNDARY DISCUSSIONS

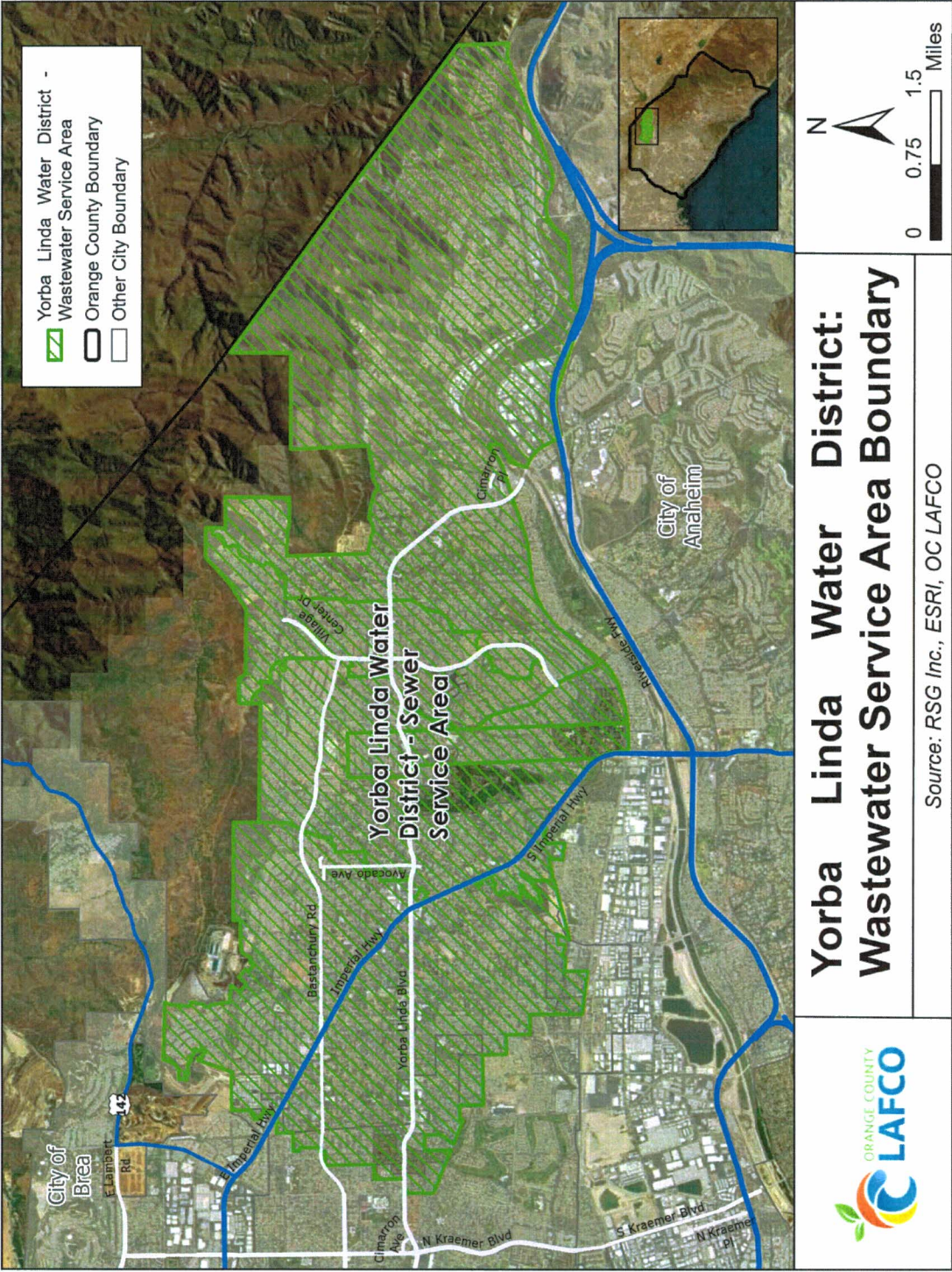
The City of Yorba Linda and the Yorba Linda Water District entered into an agreement in 1977 wherein the District agreed to provide water services to the City and areas annexed

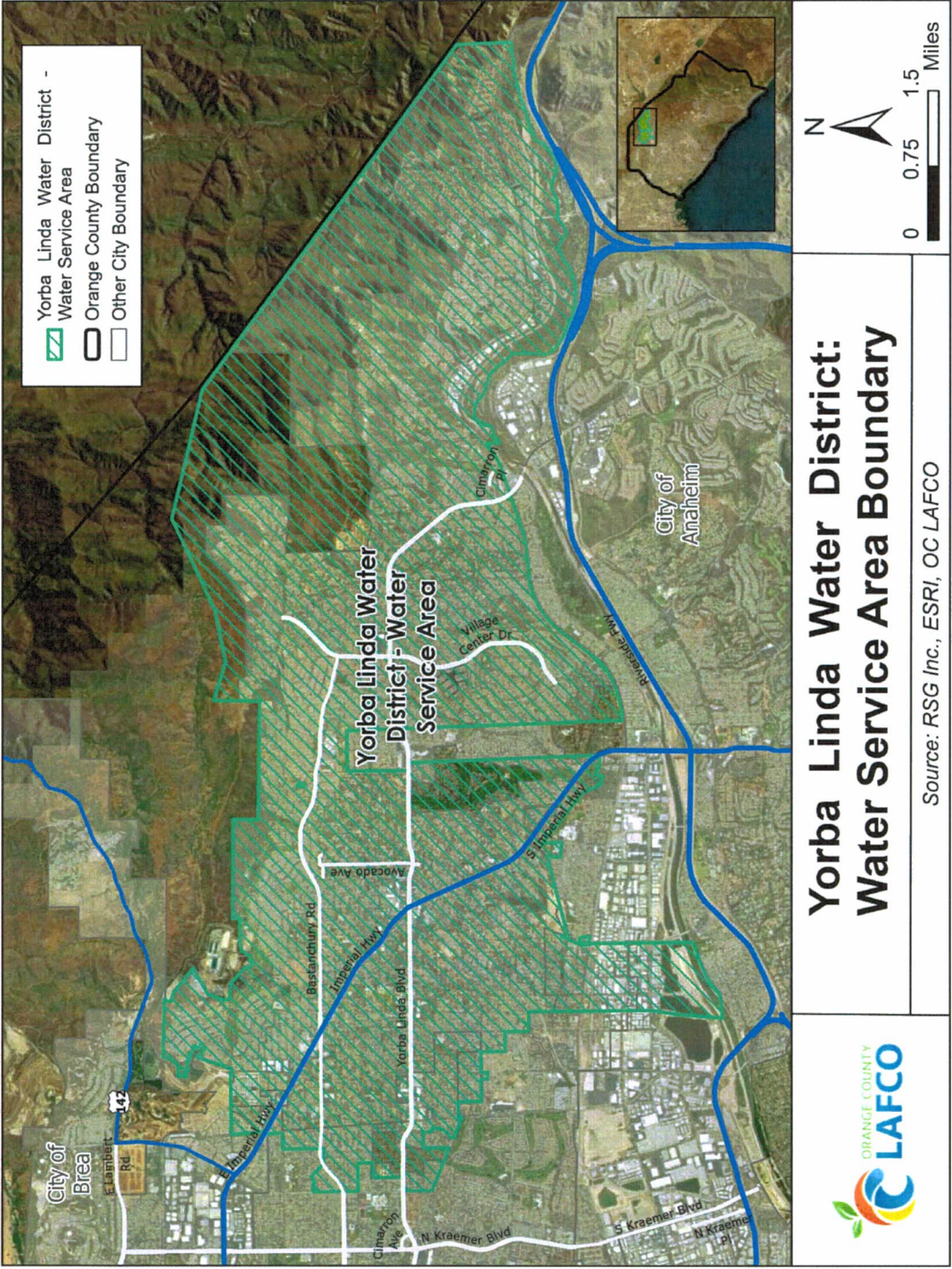
into the City thereafter. This agreement was limited to water services, with wastewater services remaining confined to areas within the District's boundary at that time.

In April 2011, the City and District executed a subsequent agreement expanding the District's role to include wastewater service to all areas within the City of Yorba Linda, including future annexations. This effectively extended the Yorba Linda Water District's wastewater service area to encompass most of the City, with limited exceptions.

One such exception is the narrow Locke Ranch area, situated west of Village Center Drive and bifurcated by Yorba Linda Boulevard. Although historically within the City of Yorba Linda, this area was annexed into the Yorba Linda Water District in December 2011 for wastewater services only. Water service to the Locke Ranch area continues to be exclusively provided by the Golden State Water Company pursuant to an existing agreement with the property owner.

As a result, Yorba Linda Water District maintains two distinct services areas—water and wastewater—which do not fully align. These service areas are illustrated in the maps shown below.





II. BACKGROUND

LEGAL REQUIREMENTS AND PURPOSE

In 1963 the California Legislature created for each County a Local Agency Formation Commission (“LAFCO”) to oversee the logical formation and determination of local agency boundaries that encourage orderly growth and development essential to the social, fiscal, and economic well-being of the State. LAFCOs’ authority to conduct this legislative charge is codified in the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (“CKH”). For nearly 60 years, CKH has been amended to give more direction to LAFCOs and, in some cases, expand the authorities of the Commissions. One of the most important revisions to CKH by the Legislature occurred in 2000, which added a requirement that LAFCOs review and update the “spheres of influence” for all cities and special districts every five years and, in conjunction with this responsibility, prepare comprehensive studies that are known as “municipal service reviews.”

AUTHORITY AND POWERS OF LAFCO

Codified within CKH are the procedures and processes for LAFCOs to conduct their purposes as established by the Legislature. LAFCOs’ purposes are guided and achieved through their regulatory and

planning powers and acknowledge that the local conditions of the 58 California counties shall be considered in part to the Commissions’ authorities.

CKH ACT (G.C. SECTION 56301) – PURPOSES OF LAFCOs

“Among the purposes of a commission are discouraging urban sprawl, preserving open-space and prime agricultural lands, encouraging the efficient provision of government services, and encouraging the orderly formation and development of local agencies based upon local conditions and circumstances.”

LAFCO RESPONSIBILITIES

LAFCOs’ regulatory authorities include the reviewing, approving, amending, or denying of proposals to change the jurisdictional boundaries of cities and special districts. Specifically, these types of boundary changes commonly referred to as “changes of organization,” include:

- City Incorporation
- City Disincorporation
- District Formation
- District Dissolution
- City and District Annexations and Detachments
- City and District Consolidations
- Merger of a City and District
- Establishment of a Subsidiary District
- Activation of new or different functions or classes of services, or divestiture of power to provide services for special districts.

PLANNING AUTHORITIES

LAFCOs' planning authorities are conducted through the establishment and updating of agencies' SOIs, which is a tool used to define a city or special district's future jurisdictional boundary and service areas. Through the reform of CKH in 2000, LAFCO's planning responsibility includes the preparation of comprehensive studies ("MSRs") that analyze service or services within the county, region, subregion, or other designated geographic area. The determinations that LAFCOs must review, analyze, and adopt for SOIs and MSRs are discussed below.

SPHERE OF INFLUENCE UPDATES

In 1972, LAFCOs throughout the State were tasked with determining and overseeing the SOIs for local government agencies. An SOI is a planning boundary that may be outside of an agency's jurisdictional boundary (such as the city limits or a special district's service area) that designates the agency's probable future boundary and service area. The purpose of an SOI is to ensure the provision of efficient services while discouraging urban sprawl and the premature conversion of agricultural and open space lands, and by preventing overlapping jurisdictions and duplication of services. On a regional level, LAFCOs coordinate the orderly development of a community through reconciling differences between different agency plans. This is intended to ensure the most efficient

urban service arrangements are created for the benefit of area residents and property owners. Factors considered in an SOI update include current and future land use, capacity needs, and any relevant areas of interest such as geographical terrain, location, and any other aspects that would influence the level of service.

Per Government Code Section 56425, a LAFCO shall consider and prepare a written statement of its SOI determinations on the following five (5) factors:

- 1. The present and planned land use in the area, including agricultural and open-space lands.*
- 2. The present and probable need for public facilities and services in the area.*
- 3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide.*
- 4. The existence of any social or economic communities of interest in the area if the commission determines that they are relevant to the agency.*
- 5. If a city or special district provides public facilities or services related to sewer, municipal and industrial water, or structural fire protection the present and probable need for those facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.*

SOIs may be modified as determined by LAFCO using the procedures for making sphere amendments as outlined by CKH. Pursuant to Government Code Section 56430, a LAFCO must first conduct an MSR prior to updating or amending an SOI.

MUNICIPAL SERVICE REVIEWS

Section 56425(g) of CKH requires that LAFCOs evaluate an SOI every five years, or when necessary. The vehicle for doing this is known as a Municipal Service Review.

Pursuant to Government Code Section 56430, MSRs make determinations on seven (7) required topics as follows:

- 1. Growth and population projections for the affected area.*
- 2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence(s).*
- 3. Present and planned capacity of public facilities, adequacy of public services, and infrastructure needs or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.*
- 4. Financial ability of agencies to provide services.*
- 5. Status of, and opportunities for, shared facilities.*
- 6. Accountability for community service needs, including government structure and operational efficiencies.*
- 7. Any other matter related to effective or efficient service delivery, as required by Commission Policy.*

The focus of an MSR is to ensure that public services are being conducted efficiently and the residents of any given area or community are receiving the highest level of service possible, while also discouraging urban sprawl and the premature conversion of agricultural lands. If an MSR identifies that existing public services are not being provided efficiently, effectively, or in a manner that meets community needs, LAFCO may recommend actions to improve service delivery and local governance. These recommendations can include adjustments to agency spheres of influence, consolidation, or dissolution of districts, or other organizational or governance changes within LAFCO's authority. Through these tools, the MSR process serves as a proactive mechanism to enhance service efficiency, promote accountability, and ensure that residents receive the highest feasible level of service.

PRIOR MUNICIPAL SERVICE REVIEWS

Three cycles of MSRs were completed by OC LAFCO prior to this one. The first was produced in 2005, the second in 2008, and the third in 2013. Each MSR cycle has provided OC LAFCO with new and important information regarding the delivery of services to OC residents.

In furthering OC LAFCO's goals, the MSR process has produced key resources over successive cycles to enhance service coordination, promote accountability, and strengthen transparency. Initiatives such as the Fiscal Trends Analysis and the Shared

Services programs have provided local agencies with centralized access to OC LAFCO data and resources. Additionally, OC LAFCO partners with local experts including the California State University of Fullerton's Center for Demographic Research, to monitor demographic and socioeconomic trends – particularly those informing the identification and analysis of Disadvantaged Unincorporated Communities ("DUCs").

DISADVANTAGED UNINCORPORATED COMMUNITIES (DUCS)

As part of this MSR, RSG was asked to consider the location, characteristics, and adequacy of services and public facilities related to DUCs in any of the SOIs within the North Region. DUCs are defined as inhabited territory located within an unincorporated area of a county in which the annual median household income is less than 80 percent of the statewide median household income. State law considers an area with 12 or more registered voters to be an inhabited area. CKH requires identification and analysis of service issues within DUCs as part of MSR/SOI updates. State law (SB 244) also places restrictions on annexations to cities if the proposed annexation is adjacent to a DUC. More background on DUCs and SB 244 is provided in this MSR Section "Location and Characteristics of Any DUCS".

OC LAFCO previously designated a total of 8 DUCs in the County. None of the cities or agencies in the North Region have DUCs located within or adjacent to their boundaries. Using data from the 2015 American Community Survey ("ACS") published by the US Census Bureau, these areas were designated as DUCs because their Median Household Income ("MHI") was below 80% of the statewide MHI, which amounts to a limit no higher than \$79,297.60. Further discussion on the status of these DUCs as it applies to this MSR can be found in Section VI of this report.

UNINCORPORATED AREAS

There are two unincorporated islands (territory completely or substantially surrounded by cities) that should eventually be transitioned to an adjacent city over time and when feasible. CKH, in various sections of the statute, requires LAFCO to address these areas during MSR/SOI updates and annexation proceedings. For over 20 years, OC LAFCO has

worked collaboratively with the County and multiple cities on the transitioning of unincorporated areas to the jurisdiction of adjacent cities. Today, that effort continues and includes addressing the feasibility of annexation and infrastructure deficiencies and other challenges.

The North Region has two unincorporated areas located within the SOI of the City of Yorba Linda as detailed below and depicted in the map that follows:

1. Country Club Island: The Country Club Island (Island 1 in map below) is an unincorporated area within the City of Yorba Linda's SOI located south of Yorba Linda Boulevard and north of S. Imperial Highway toward the western portion of the City's boundary and SOI. The area encompasses 299 parcels and is approximately 218.4 acres in size. Land uses within the area are predominantly residential. The following providers service the island:

- Water: Yorba Linda Water District and Golden State Water Company
- Wastewater: Yorba Linda Water District
- Solid Waste: Republic Services
- Fire Protection: Orange County Fire Authority
- Law Enforcement: Orange County Sheriff
- Animal Control: County of Orange
- Planning: County of Orange

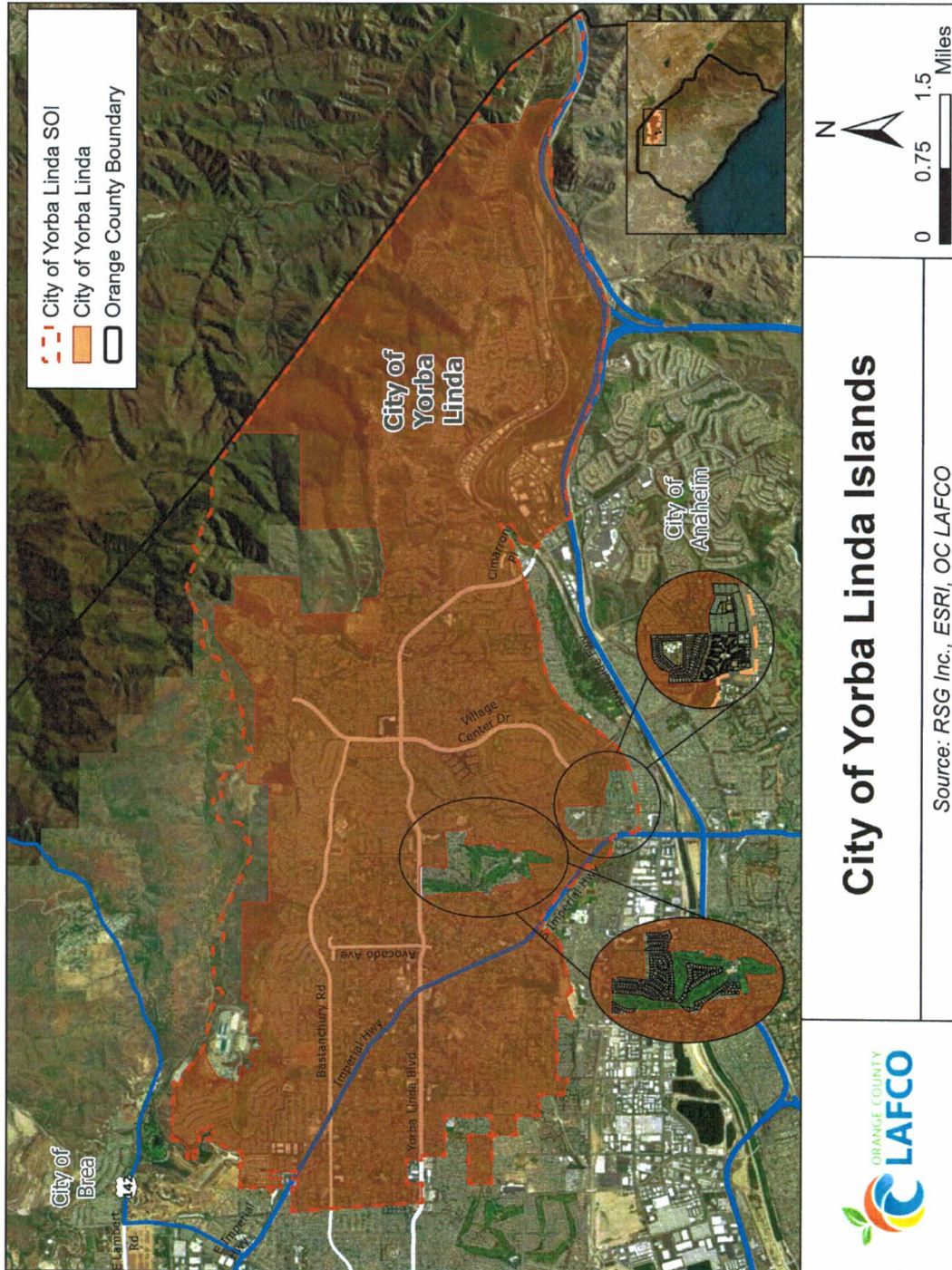
2. Fairlynn Island: The Fairlynn island (Island 2 in map below) is an unincorporated area within the City of Yorba Linda's SOI located north along S. imperial Highway, bordering the City of Anaheim and situated at the southern end of the City's boundary and SOI. The area encompasses 427 parcels and is approximately 146.6 acres in size. Land uses within the area are a combination of residential and mixed-use. The following providers service the island:

- Water: Yorba Linda Water District and Golden State Water Company
- Wastewater: Yorba Linda Water District
- Solid Waste: Republic Services

- Fire Protection: Orange County Fire Authority
- Law Enforcement: Orange County Sheriff
- Animal Control: County of Orange
- Planning: County of Orange

During agency interviews, the City of Yorba Linda confirmed that residents within Country Club Island (Island 1 in map below) have indicated they wish to receive services provided by the City but do not want to be annexed. The City of Yorba Linda further confirmed they are not aware of any existing concerns with the services being provided to the area through the respective service providers. However, residents sometimes contact the City regarding services and are redirected to the County. Based on the interview, it appears the City has not indicated an interest in pursuing annexation at this time

With respect to Fairlynn Island (Island 2 in map below), the City of Yorba Linda expressed interest in the annexation of the area. The City noted that recent discussions on this topic have been made and are being considered, with specific reference to a future housing development proposal. However, while interest has been expressed, the City has not formally pursued annexation at this time.



City of Yorba Linda Islands

Source: RSG Inc., ESRI, OC LAFCO



ORANGE COUNTY LOCAL AGENCY FORMATION COMMISSION

OC LAFCO is responsible for overseeing the boundaries, establishing, and updating SOIs, and preparing MSRs for the County's 34 cities and 34 independent and dependent special districts. Since its creation, the

MISSION:

OCLAFCO serves Orange County cities, special districts, and the county to ensure effective and efficient delivery of municipal services.

Commission has formed nine cities, approved multiple changes of organization and reorganization involving cities and special districts, and encouraged orderly development through the establishment of agency SOIs and preparation of numerous studies. OC LAFCO has also provided proactive leadership on efficient government through its Unincorporated Islands Program and an innovative presence through its Shared Services and Fiscal Indicators Web-based programs. In addition to State law, the Commission's authority is guided through adopted policies and procedures that assist in the implementation of the provisions of CKH and consideration of the local conditions and circumstances of Orange County.

COMMISSION COMPOSITION

OC LAFCO is comprised of eleven (11) members, with seven serving as regular members and four serving as alternate members. The members include: three (3) County Supervisors, three (3) City Council members, three (3) independent Special District members, and two (2) at-large representatives of the general public. All members serve four-year terms and there are no term limits. In accordance with the statute, while serving on the Commission, all Commission members shall exercise their independent judgement on behalf of the interests of residents, property owners, and the public as a whole. Table 3 depicts the current members of the Commission and their respective appointing authority and term.

Table 3: OC LAFCO Commission Roster

Commissioners	Appointing Authority	Current Term
Regular Members		
Wendy Bucknum , <i>Chair</i> City Member	City Selection Committee	2024-2028
James Fisler , <i>Vice Chair</i> Special District Member	Independent Special District Selection Committee	2024-2028
Don Wagner , <i>Immediate Past Chair</i> County Member	Board of Supervisors	2022–2026
Douglas Davert , Special District Member	Independent Special District Selection Committee	2022-2026 ²
Derek J. McGregor , Public Member	Commission	2022–2026
Peggy Huang , City Member	City Selection Committee	2022–2026
Alternate Members		
Kathryn Freshley , Alternate Special District Member	Independent Special District Selection Committee	2022–2026
Lou Penrose , Alternate Public Member	Commission	2025–2029
Carol Moore , Alternate City Member	City Selection Committee	2024–2028
Luis Tapia, Executive Officer Scott C. Smith, General Counsel		

MEETING AND CONTACT INFORMATION

The Commission's regular meetings are held on the second Wednesday of the month at 8:15 a.m. Currently, the meetings are conducted at County Administrative North (CAN) First Floor Multipurpose Room 101, 400 W. Civic Center Drive, Santa Ana, CA 92701. The OC LAFCO administrative offices are centrally located at 2677 North Main Street, Suite 1050, Santa Ana, CA 92701. Commission staff may be reached by telephone at (714) 640-5100. The agency's agendas, reports, and other resources are available online at www.oclafco.org.

METHODOLOGY AND DATA SOURCES

RSG worked in coordination with OC LAFCO staff throughout the duration of this MSR. To fully understand key factors and current issues involving the cities, RSG conducted an

² Commissioners Douglas Davert and Kathryn Freshley recently won their positions and will be sworn in July 2026 to start their new four-year term.

initial working session with OC LAFCO staff to determine the project scope and process and formalize overall MSR objectives, schedules, agency services to review, fiscal criteria, and roles and responsibilities of OC LAFCO, RSG, and other consultants. Key tasks and activities in the completion of this MSR included a thorough review of available relevant agency data and documents; interviews with agencies; development of agency profiles; MSR and SOI determination analysis; preparation of administrative and public review drafts of the MSR; incorporation of agency, OC LAFCO, and public comments; and consideration by OC LAFCO of adoption of the final MSR.

It is important to acknowledge that the data presented in this report represents the best information available during the data collection phase, which was largely completed between September 2025 and May 2026. This report represents a snapshot in time, and there may be material changes since then that are not reflected in this report.

This MSR generally uses the Federal Decennial Census ("Census") or California's State Department of Finance ("DOF") Population and Housing Estimates for cities and the County. The DOF's Demographic Research Unit publishes population estimates annually and are the official population and housing unit tallies used in most State programs and for jurisdictional appropriation limits. The estimates are restricted to cities and counties and do not encompass all potential taxing entities or districts in the State. The data from DOF only reports on total population, total housing units, housing type, and unit occupancy status.

Some of the demographic data reported in this MSR comes from ESRI's Business Analyst online software. The platform uses Geographic Information Systems ("GIS") to produce a variety of comparison reports for areas both smaller and larger than most official data sources, such as the Census or DOF. DOF does not provide data for unincorporated areas within SOIs. To produce the demographic reports for these areas, RSG extracted demographic data from ESRI's Business Analyst software using GIS shapefiles provided by OC LAFCO. Subjects in this MSR pertaining to growth rates, poverty rates, number of workers in the jurisdiction, and number of businesses all were produced in part by inputting boundary shapefiles into the GIS functions of Business Analyst. Where applicable, this

MSR notes agency disagreements with certain reported demographic numbers or rates. Population and housing unit data for the special districts was derived from ESRI, but not for the cities. Demographic data from ESRI is from 2025.

There are some instances where the data sources RSG used for this report are not aligned, either with each other or with information provided by the North Region Agencies, particularly with regards to population and housing projections. In these instances, RSG made individual adjustments to mitigate the difference among the external sources, or presented figures provided by the agency in-lieu of data from ESRI or DOF.

Summary fiscal health data was researched and provided to RSG by another consultant, Berkson Associates, as part of a separate and independent engagement with OC LAFCO to populate a set of “Fiscal Indicators” that will appear on OC LAFCO’s website. The Fiscal Indicators provide the latest six years of revenue, expenditures, net position, and reserves data reported in the agencies’ financial audits and budgets. Berkson also provided a summary of the trends for each line item. OC LAFCO’s partnership with Berkson to develop the Fiscal Indicators website aided RSG in the review of the North Region agencies’ finances. As a result, this MSR did not undertake any further detailed review of each agency’s finances, but RSG consulted with Berkson to present and briefly summarize their findings.

III. AGENCY PROFILES

As part of this MSR, OC LAFCO and RSG examined a range of municipal services provided by each agency in the North Region. This section provides summaries of the governing structure, population and service area, types of services, and the service providers of each agency. The profile tables of each North Region city cover the key services provided in the city, while the special district profiles provide details only on the services they are legally authorized to provide. A demographic summary and a map of each agency are shown following the profile table.

Summary financial trends of each agency from FY 2018-19 to FY 2023-24 are also depicted in this section. All financial tables were produced using the Fiscal Indicators data described in the prior section. Trends shown are exclusive of transfers in and out. Transfers of Net Revenue to capital funds and other uses are not shown; transfers to designated operating reserves may not be required if agency reserve targets are being met.

City of Brea Incorporated February 23, 1917 General Law City	
Agency Information	
Address	1 Civic Center Circle, Brea, CA 92821
Primary Contact	Kristin Griffith, City Manager
Contact Information	714-990-7710
Website	www.cityofbrea.gov
Governance	5 Council Members, Elected At-Large; Mayor Appointed by Council
Total City Staff	335 full-time and 71 part-time
Service Area Information	
Incorporated Area (Sq. Mi.)	12.24
Population	47,900
Population of Unincorporated SOI	27
Service Summary	
<u>Service or Department</u>	<u>Provider</u>
Law Enforcement	Brea
Fire Protection/Emergency Medical	Brea
Building/Planning	Brea
Code Enforcement	Brea
Animal Control	Brea (contractual agreement with County of Orange Animal Control)
Parks and Recreation	Brea
Library	Brea (contractual agreement with County of Orange)
Museum	Brea and Non-profit Brea Historical Society
Landscape Maintenance	Brea
Lighting	Southern California Edison Company
Streets/Road Maintenance	Brea
Electricity/Gas	Southern California Edison Company, SoCal Gas
Solid Waste	Brea (contractual agreement with Republic Services)
Stormwater Protection	Brea
Water	Brea and Yorba Linda Water District
Wastewater	Brea and Yorba Linda Water District
Wholesale Water (Surface Water)	Municipal Water District of Orange County (MWDOC)
Groundwater	California Domestic Water Company (Cal Domestic)
Sanitation	Orange County Sanitation District
Cemetery	Orange County Cemetery District
Vector Control	Orange County Mosquito & Vector Control District

Demographic Summary

Population & Density	Agency	County
2020 Population	47,308	3,186,196
2025 Population	47,441	3,166,250
2030 Population ¹	48,074	3,173,544
2025-2030 Projected Annual Growth Rate (%)	0.27% >	0.05%
Daytime Population	70,974	3,186,196
Unincorporated SOI Population	47,471	-
Households	17,635	1,099,078
Household Size	2.69 <	2.88
Area (Square Miles)	12.24	798.83
Density (Persons per Square Mile)	3,877 <	3,964
Housing		
Housing Units	18,519	1,158,955
Owner Occupied (%)	59.3% >	55.9%
Renter Occupied (%)	40.7% <	44.1%
Vacant (%)	4.8% =	5.2%
Median Home Value	\$ 933,572 <	\$ 1,012,468
Employment & Poverty		
Businesses	3,789	164,032
Employees	47,463	1,553,450
Median Household Income	\$ 126,779 >	\$ 115,723
Public Transportation Commuters (%)	0.5% <	1.2%
Commute Longer than 60 Minutes (%)	12.0% >	8.3%
Poverty Rate	7.0% <	9.6%

¹2030 Population estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI Business Analyst

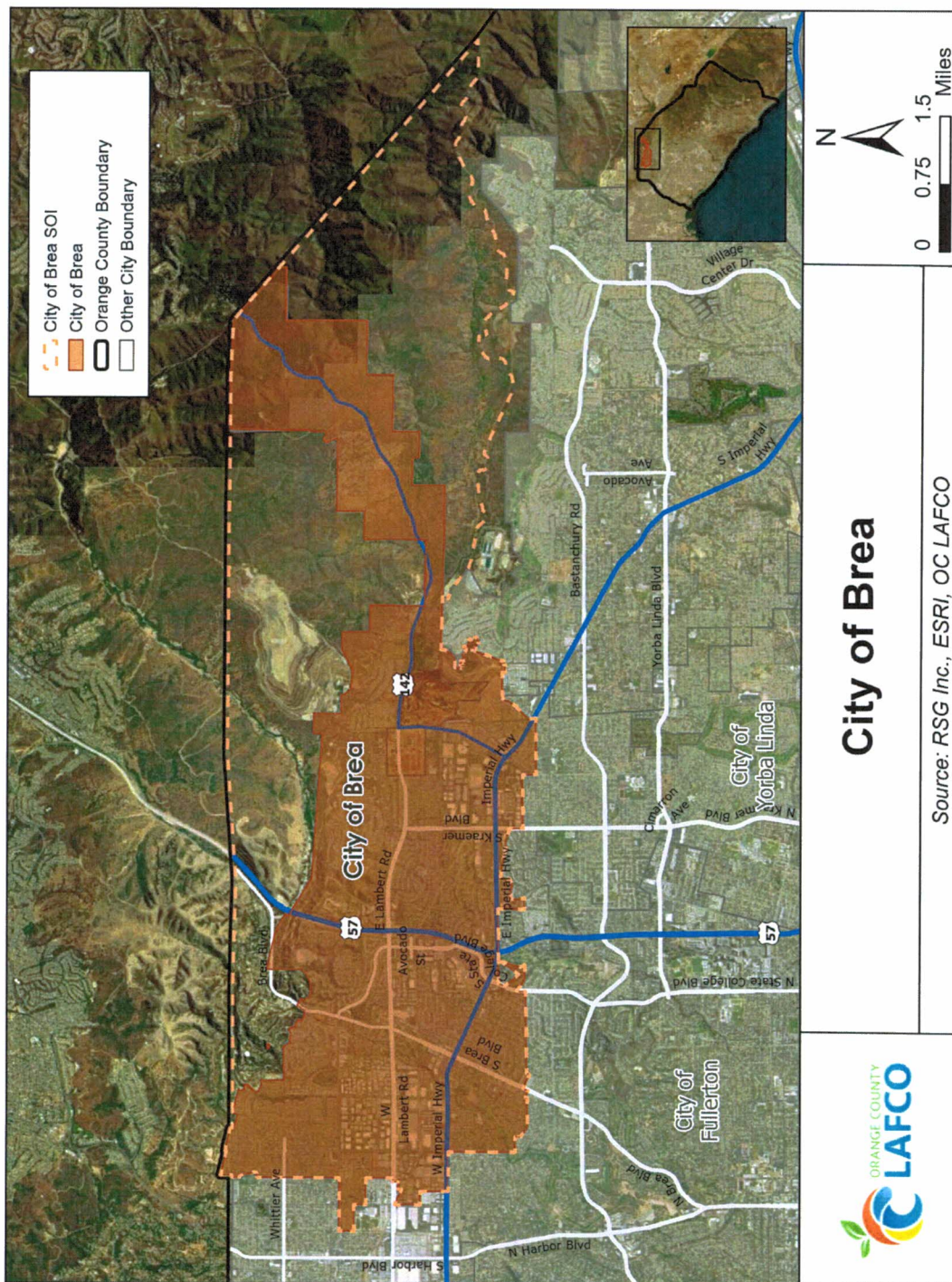
Financial Summary

Brea

Financial Summary ¹	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Revenue	\$ 65,445,918	\$ 64,915,055	\$ 69,340,865	\$ 63,047,821	\$ 80,629,715	\$ 77,381,683
Expenditures	57,009,277	64,734,885	60,850,225	66,272,766	70,676,546	75,567,728
Net	\$ 8,436,641	\$ 180,170	\$ 8,490,640	\$ (3,224,945)	\$ 9,953,169	\$ 1,813,955
Net Operating Income	\$ 21,023,689	\$ 19,891,722	\$ 29,410,655	\$ 25,265,822	\$ 29,344,926	\$ 28,051,499

¹Reserves shown are based on Unassigned General Fund Balance and Committed to Contingency Reserves.

Source: OC LAFCO Fiscal Indicators, Berkson & Associates



City of Fullerton Incorporated February 15, 1904 General Law City	
Agency Information	
Address	303 W. Commonwealth Ave., Fullerton, CA 92832
Primary Contact	Eddie Manfro, Interim City Manager
Contact Information	714-738-6310
Website	www.cityoffullerton.com
Governance	5 Council Members, Elected By-District; Mayor Appointed by City Council
Total City Staff	555 full-time and 138 part-time
Service Area Information	
Incorporated Area (Sq. Mi.)	22.44
Population	141,469
Population of Unincorporated SOI	Not applicable
Service Summary	
<u>Service or Department</u>	<u>Provider</u>
Law Enforcement	Fullerton
Fire Protection/Emergency Medical	Fullerton
Building/Planning	Fullerton
Code Enforcement	Fullerton
Animal Control	Fullerton (contractual agreement with Orange County Animal Control)
Parks and Recreation	Fullerton
Library	Fullerton
Museum	Fullerton
Landscape Maintenance	Fullerton
Lighting	Fullerton
Streets/Road Maintenance	Fullerton
Electricity/Gas	Southern California Edison Company, OC Power Authority, and SoCalGas
Solid Waste	Fullerton (contractual agreement with Republic Services)
Stormwater Protection	Fullerton
Water	Fullerton
Wastewater	Fullerton
Groundwater	Orange County Water District
Sanitation	Orange County Sanitation District
Wholesale Water	Metropolitan Water District of Southern California
Cemetery	Orange County Cemetery District
Vector Control	Orange County Mosquito & Vector Control District

Demographic Summary

Population & Density	Agency	County
2020 Population	143,617	3,186,196
2025 Population	141,075	3,166,250
2030 Population ¹	141,061	3,173,544
2025-2030 Projected Annual Growth Rate (%)	0.00% <	0.05%
Daytime Population	130,718	3,186,196
Population of Unincorporated SOI	-	
Households	48,785	1,099,078
Household Size	2.89 >	2.88
Area (Square Miles)	22.44	798.83
Density (Persons per Square Mile)	6,287 >	3,964
Housing		
Housing Units	50,772	1,158,955
Owner Occupied (%)	47.9% <	55.9%
Renter Occupied (%)	47.7% >	44.1%
Vacant (%)	3.9% =	5.2%
Median Home Value	\$ 934,456 <	\$ 1,012,468
Employment & Poverty		
Businesses	6,205	164,032
Employees	54,669	1,553,450
Median Household Income	\$ 105,337 <	\$ 115,723
Public Transportation Commuters (%)	2.2% >	1.2%
Commute Longer than 60 Minutes (%)	13.0% >	8.3%
Poverty Rate	11.4% >	9.6%

¹ 2030 Population estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI Business Analyst

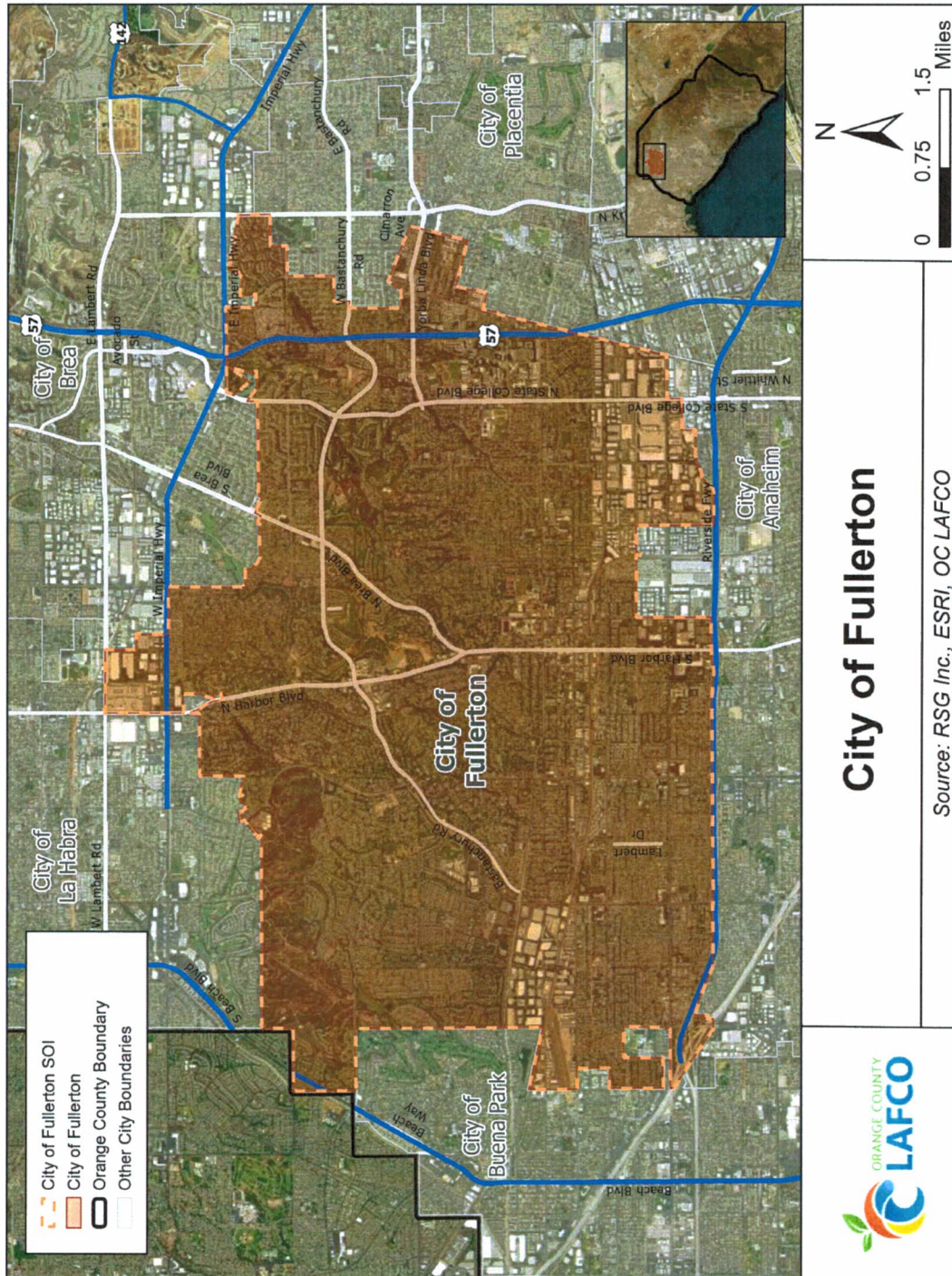
Financial Summary

Fullerton

Financial Summary ¹	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Revenue	\$ 100,526,519	\$ 97,005,904	\$ 101,242,281	\$ 112,101,517	\$ 120,567,713	\$ 123,608,312
Expenditures	94,513,448	99,928,975	97,970,495	104,207,701	114,287,670	123,978,000
Net	\$ 6,013,071	\$ (2,923,071)	\$ 3,271,786	\$ 7,893,816	\$ 6,280,043	\$ (369,688)
Net Operating Income	\$ 21,088,209	\$ 14,175,773	\$ 16,140,010	\$ 22,603,587	\$ 30,119,606	\$ 33,083,994

¹ Reserves shown are based on Unassigned General Fund Balance and Committed to Contingency Reserves.

Source: OC LAFCO Fiscal Indicators, Berkson & Associates



City of La Habra Incorporated January 20, 1925 General Law City	
Agency Information	
Address	110 East La Habra Blvd. La Habra, CA 90631
Primary Contact	Jim Sadro, City Manager
Contact Information	562-383-4010
Website	www.lahabraca.gov
Governance	5 Council Members, Elected At-Large, Mayor Appointed by City Council
Total City Staff	274 full-time and 158 part-time
Service Area Information	
Incorporated Area (Sq. Mi.)	7.57
Population	61,202
Population of Unincorporated SOI	Not applicable
Service Summary	
<u>Service or Department</u>	<u>Provider</u>
Law Enforcement	La Habra
Fire Protection/Emergency Medical	La Habra (contractual agreement with Los Angeles County Fire Authority)
Building/Planning	La Habra
Code Enforcement	La Habra
Animal Control	La Habra
Parks and Recreation	La Habra
Library	La Habra (contractual agreement with Orange County)
Museum	La Habra
Landscape Maintenance	La Habra
Lighting	La Habra
Streets/Road Maintenance	La Habra
Electricity/Gas	Southern California Edison Company and SoCalGas
Solid Waste	La Habra (contractual agreement with CR&R Environmental Services)
Stormwater Protection	La Habra
Water	La Habra
Wastewater	La Habra
Groundwater	Orange County Water District
Sanitation	Orange County Sanitation District
Wholesale Water	Municipal Water District of Orange County
Cemetery	Orange County Cemetery District
Vector Control	Orange County Mosquito & Vector Control District

Demographic Summary

Population & Density	Agency	County
2020 Population	61,042	3,186,196
2025 Population	59,685	3,166,250
2030 Population ¹	59,265	3,173,544
2025-2030 Projected Annual Growth Rate (%)	-0.14% <	0.05%
Daytime Population	49,219	3,186,196
Population of Unincorporated SOI	-	
Households	19,702	1,099,078
Household Size	3.03 >	2.88
Area (Square Miles)	7.57	798.83
Density (Persons per Square Mile)	7,887 >	3,964
Housing		
Housing Units	20,237	1,158,955
Owner Occupied (%)	56.5% >	55.9%
Renter Occupied (%)	43.4% <	44.1%
Vacant (%)	2.6% =	5.2%
Median Home Value	\$ 883,983 <	\$ 1,012,468
Employment & Poverty		
Businesses	2,089	164,032
Employees	18,043	1,553,450
Median Household Income	\$ 100,692 <	\$ 115,723
Public Transportation Commuters (%)	1.5% >	1.2%
Commute Longer than 60 Minutes (%)	12.3% >	8.3%
Poverty Rate	9.4% <	9.6%

¹2030 Population estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI
Business Analyst

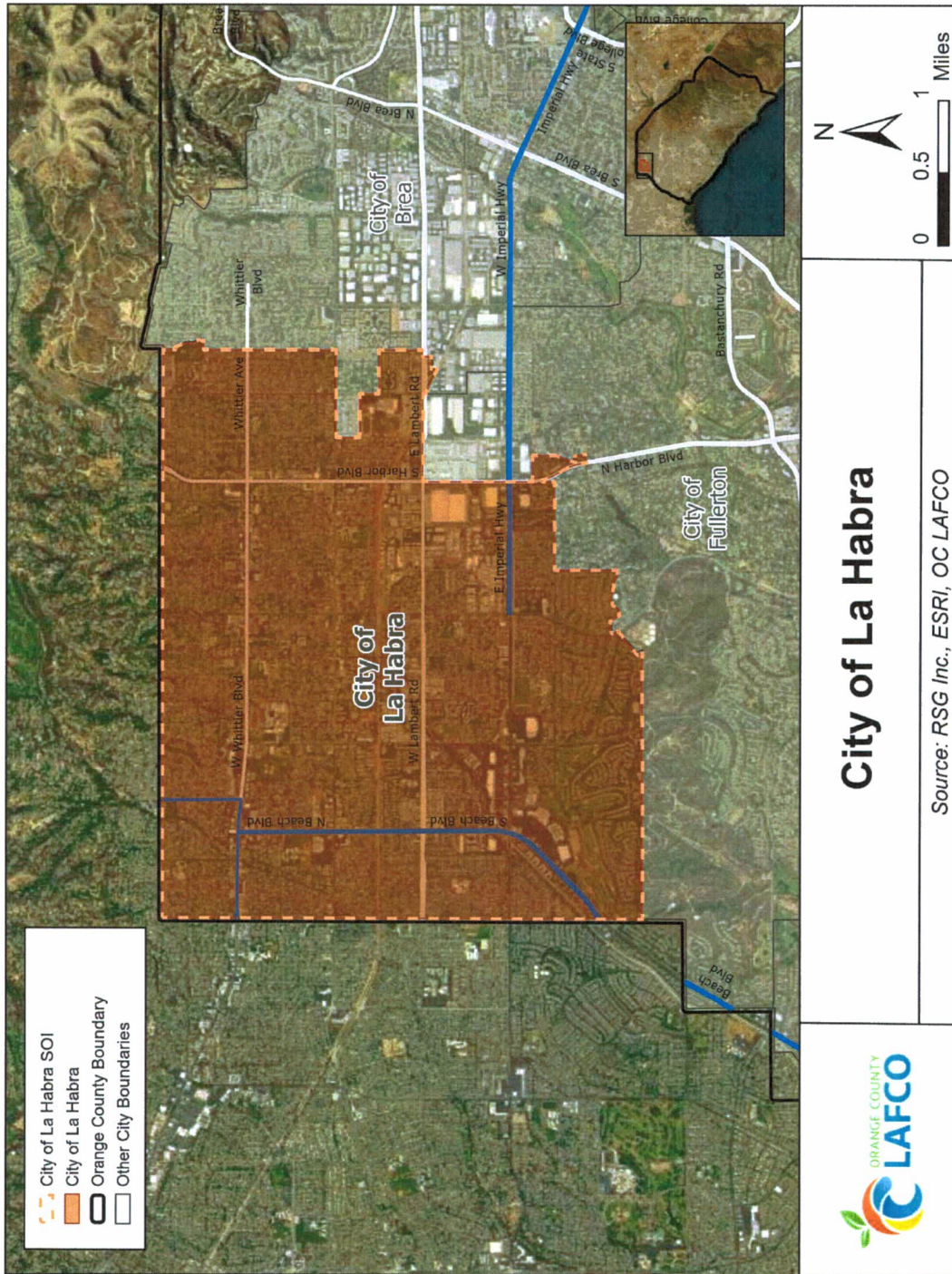
Financial Summary

La Habra

Financial Summary ¹	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Revenue	\$ 48,583,838	\$ 48,030,895	\$ 51,808,141	\$ 55,718,868	\$ 60,264,098	\$ 62,986,537
Expenditures	44,413,031	44,679,932	45,610,034	116,701,731	42,883,279	50,800,859
Net	\$ 4,170,807	\$ 3,350,963	\$ 6,198,107	\$ (60,982,863)	\$ 17,380,819	\$ 12,185,678
Net Operating Income	\$ 7,717,970	\$ 8,602,672	\$ 8,325,715	\$ 10,233,206	\$ 11,359,983	\$ 13,588,010

¹Reserves shown are based on Unassigned General Fund Balance and Committed to Contingency Reserves.

Source: OC LAFCO Fiscal Indicators, Berkson & Associates



City of Placentia Incorporated December 2, 1926 Charter City	
Agency Information	
Address	401 E Chapman Ave., Placentia, CA 92870
Primary Contact	Jennifer Lampman, City Administrator
Contact Information	714-993-8231
Website	www.placentia.org
Governance	5 Council Members, Elected By-District; Administrator Appointed by Council
Total City Staff	197 full-time and 130 part-time (Including seasonal employees in the summer)
Service Area Information	
Incorporated Area (Sq. Mi.)	6.61
Population	53,982
Population of Unincorporated SOI	Not applicable
Service Summary	
<u>Service or Department</u>	<u>Provider</u>
Law Enforcement	Placentia
Fire Protection/Emergency Medical	Placentia
Building/Planning	Placentia
Code Enforcement	Placentia
Animal Control	Placentia (contractual agreement with Orange County Animal Control)
Parks and Recreation	Placentia
Library	Placentia Library District
Museum	Non-profit Placentia Founders Society
Landscape Maintenance	Placentia (contractual agreement with Sweeping Corporation of America (SCA) Inc)
Lighting	Southern California Edison Company
Streets/Road Maintenance	Placentia (contractual agreement with Sweeping Corporation of America (SCA) Inc)
Electricity/Gas	Southern California Edison Company, and SoCalGas
Solid Waste	Placentia (contractual agreement with Republic Services)
Stormwater Protection	Placentia
Water	Yorba Linda Water District and Golden State Water Company
Wastewater	Placentia and Yorba Linda Water District
Wholesale Water	Metropolitan Water District of Southern California
Groundwater	Orange County Water District
Sanitation	Orange County Sanitation District
Cemetery	Orange County Cemetery District
Vector Control	Orange County Mosquito & Vector Control District

Demographic Summary

Population & Density	Agency	County
2020 Population	51,824	3,186,196
2025 Population	51,513	3,166,250
2030 Population ¹	51,339	3,173,544
2025-2030 Projected Annual Growth Rate (%)	-0.07% <	0.05%
Daytime Population	45,339	3,186,196
Population of Unincorporated SOI	-	
Households	17,210	1,099,078
Household Size	2.99 >	2.88
Area (Square Miles)	6.61	798.83
Density (Persons per Square Mile)	7,794 >	3,964
Housing		
Housing Units	17,696	1,158,955
Owner Occupied (%)	62.1% >	55.9%
Renter Occupied (%)	37.9% <	44.1%
Vacant (%)	2.8% =	5.2%
Median Home Value	\$ 937,694 <	\$ 1,012,468
Employment & Poverty		
Businesses	1,997	164,032
Employees	18,860	1,553,450
Median Household Income	\$ 113,320 <	\$ 115,723
Public Transportation Commuters (%)	1.6% >	1.2%
Commute Longer than 60 Minutes (%)	9.5% >	8.3%
Poverty Rate	8.9% <	9.6%

¹2030 Population estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI
Business Analyst

Financial Summary

Placentia

Financial Summary ¹	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Revenue	\$ 35,443,479	\$ 40,855,177	\$ 43,397,710	\$ 47,713,443	\$ 51,919,973	\$ 54,352,690
Expenditures ²	33,300,522	37,203,534	33,557,006	37,055,495	43,233,237	47,019,011
Net	\$ 2,142,957	\$ 3,651,643	\$ 9,840,704	\$ 10,657,948	\$ 8,686,736	\$ 7,333,679
Net Operating Income	\$ 543,287	\$ 3,866,292	\$ 9,893,885	\$ 7,204,966	\$ 19,918,635	\$ 14,795,659

¹Reserves shown are based on Unassigned General Fund Balance and Committed to Contingency Reserves.

²Expenditures exclude capital outlays

Source: OC LAFCO Fiscal Indicators, Berkson & Associates



City of Yorba Linda Incorporated November 2, 1967 General Law City	
Agency Information	
Address	4845 Casa Loma Ave., Yorba Linda, CA 92886
Primary Contact	Peter Grant, City Manager
Contact Information	714-961-7110
Website	www.yorbalindaca.gov
Governance	5 City Council Members, Elected At-Large; Mayor Appointed by Council
Total City Staff	116 full-time and 168 part-time
Service Area Information	
Incorporated Area (Sq. Mi.)	19.95
Population	66,267
Population of Unincorporated SOI	2,818
Service Summary	
<i>Service or Department</i>	<i>Provider</i>
Law Enforcement	Yorba Linda (contractual agreement with Orange County Sheriff's Department)
Fire Protection/Emergency Medical	Yorba Linda (contractual agreement with Orange County Fire Authority)
Building/Planning	Yorba Linda
Code Enforcement	Yorba Linda
Animal Control	Yorba Linda (contractual agreement with Orange County Animal Care)
Parks and Recreation	Yorba Linda
Library	Yorba Linda
Museum	Yorba Linda & Yorba Linda Historical Society
Landscape Maintenance	Yorba Linda
Lighting	Yorba Linda
Streets/Road Maintenance	Yorba Linda
Electricity/Gas	SCE, SoCalGas
Solid Waste	Yorba Linda (contractual agreement with Republic Service)
Stormwater Protection	Yorba Linda
Water	Yorba Linda Water District
Wastewater	Yorba Linda Water District
Wholesale Water	Municipal Water District of Orange County
Groundwater	Orange County Water District
Sanitation	Orange County Sanitation District
Cemetery	Orange County Cemetery District
Vector Control	Orange County Mosquito & Vector Control District

Demographic Summary

Population & Density	Agency	County
2020 Population	67,844	3,186,196
2025 Population	66,329	3,166,250
2030 Population ¹	65,691	3,173,544
2025-2030 Projected Annual Growth Rate (%)	-0.19% <	0.05%
Daytime Population	54,427	3,186,196
Population of Unincorporated SOI	2,818	
Households	22,948	1,099,078
Household Size	2.89 >	2.88
Area (Square Miles)	19.95	798.83
Density (Persons per Square Mile)	3,325 <	3,964
Housing		
Housing Units	23,567	1,158,955
Owner Occupied (%)	82.3% >	55.9%
Renter Occupied (%)	17.7% <	44.1%
Vacant (%)	2.6% =	5.2%
Median Home Value	\$ 1,292,073 >	\$ 1,012,468
Employment & Poverty		
Businesses	2,480	164,032
Employees	17,166	1,553,450
Median Household Income	\$ 158,775 >	\$ 115,723
Public Transportation Commuters (%)	0.4% <	1.2%
Commute Longer than 60 Minutes (%)	12.6% >	8.3%
Poverty Rate	6.5% <	9.6%

¹2030 Population estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI
Business Analyst

Financial Summary

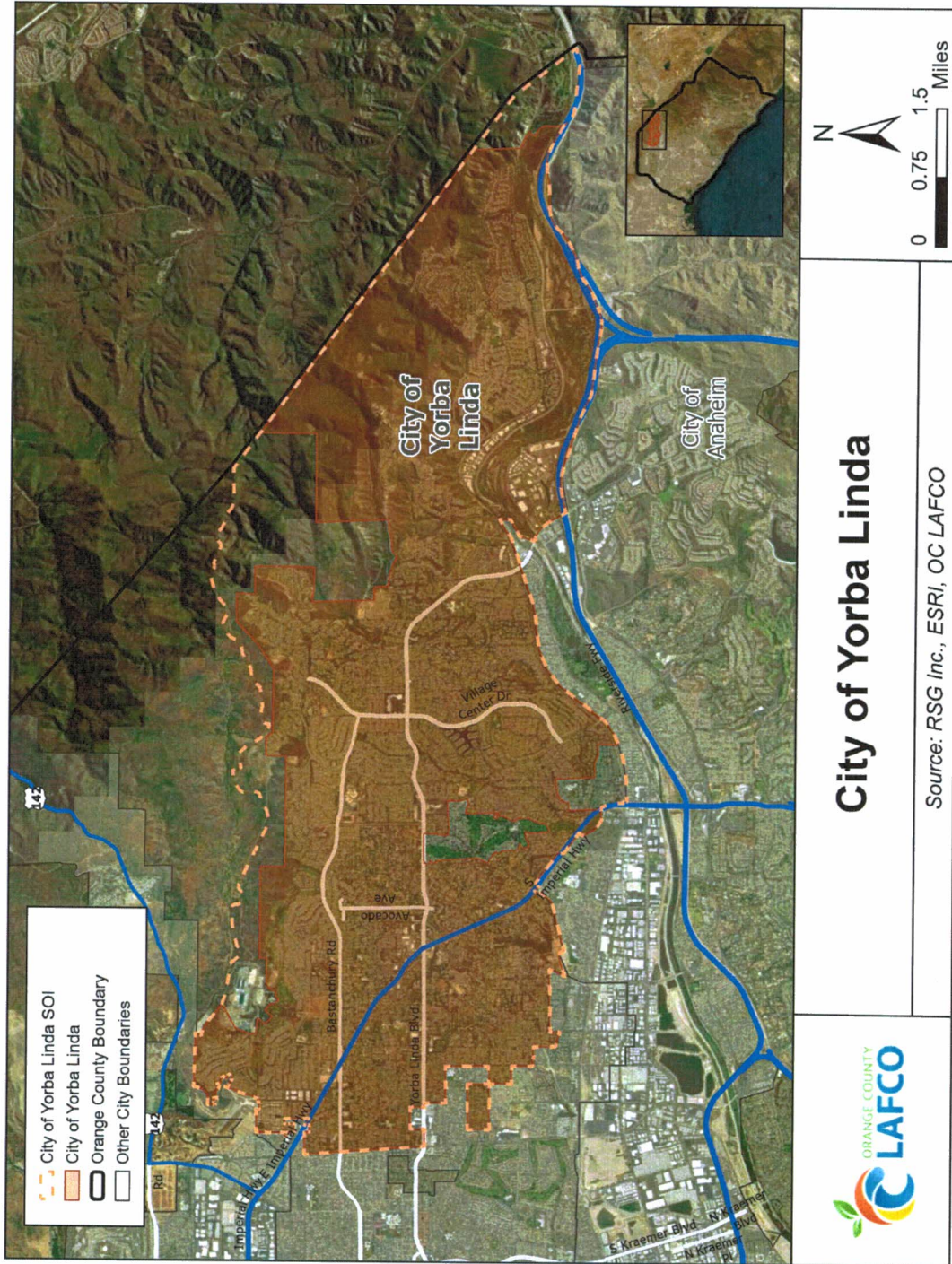
Yorba Linda

Financial Summary ¹	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Revenue ²	\$ 38,335,027	\$ 38,812,618	\$ 38,908,420	\$ 41,630,089	\$ 46,781,958	\$ 48,846,117
Expenditures	33,566,515	37,375,162	37,214,496	36,732,750	42,925,668	43,482,608
Net	\$ 4,768,512	\$ 1,437,456	\$ 1,693,924	\$ 4,897,339	\$ 3,856,290	\$ 5,363,509
Net Operating Income	\$ 23,474,863	\$ 22,279,197	\$ 23,558,844	\$ 29,785,867	\$ 26,548,359	\$ 25,395,988

¹Reserves shown include fund balances committed to operating reserves and are based on Unassigned General Fund

²Revenues indicator excluded debt service exclude capital outlays.

Source: OC LAFCO Fiscal Indicators, Berkson & Associates



Placentia Library District Established September 2, 1919 Independent Special District	
District Information	
Address	411 E. Chapman Ave., Placentia, CA 92870
Primary Contact	Jeanette Contreras, Library Director
Contact Information	714-528-1906
Website	www.placentialibrarydistrict.ca.gov
Governance	5-Member Board of Trustees, Appointed By Orange County Board of Supervisors
Total Agency Staff	19 full-time and 5 part-time; 10 on call
Service Area Information	
Jurisdictional Boundary (Sq. Mi.)	6.77
Communities Served	City of Placentia, City of Anaheim ³
Population in Boundary	52,422
Facilities Information	
Library (count)	1
Hours of Operation	Monday – Thursday: 9am-8pm Friday – Saturday: 9am-5pm Sunday: 1pm-5pm
Services	Passports, Curbside Pickups, Computers & Printing, Meeting Room Rental, Tutoring, and Hangar Makerspace (crafts)
Shared Facilities w/ City of Placentia	Placentia Civic Center

³ Placentia Library District serves a total of 6 parcels that are within the City of Anaheim.

Demographic Summary

Population & Density	Agency	County
2020 Population	52,738	3,186,196
2025 Population	52,422	3,166,250
2030 Population ¹	52,230	3,173,544
2025-2030 Projected Annual Growth Rate (%)	-0.07% <	0.05%
Daytime Population	45,835	3,186,196
Unincorporated SOI Population	52,422	-
Households	17,505	1,099,078
Household Size	2.99 >	2.88
Area (Square Miles)	6.77	798.83
Density (Persons per Square Mile)	7,739 >	3,964
Housing		
Housing Units	17,994	1,158,955
Owner Occupied (%)	62.4% >	55.9%
Renter Occupied (%)	37.6% <	44.1%
Vacant (%)	2.7% =	5.2%
Median Home Value	\$ 937,838 <	\$ 1,012,468
Employment & Poverty		
Businesses	2,007	164,032
Employees	18,935	1,553,450
Median Household Income	\$ 113,474 <	\$ 115,723
Public Transportation Commuters (%)	1.5% >	1.2%
Commute Longer than 60 Minutes (%)	9.6% >	8.3%
Poverty Rate	8.9% <	9.6%

¹ 2030 Population estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI Business Analyst

Financial Summary

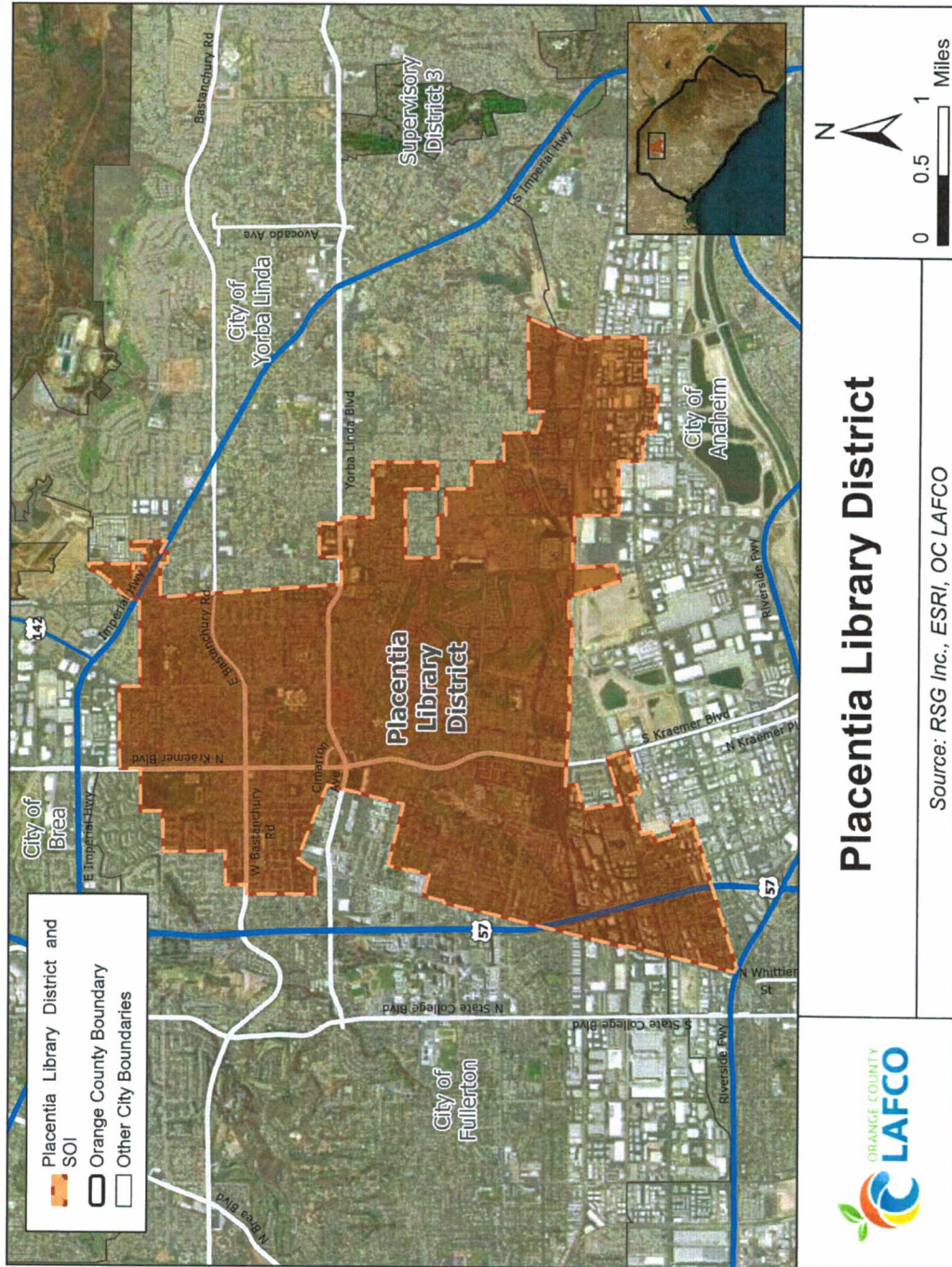
Placentia Library District

Financial Summary ¹	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Revenue	\$ 3,125,442	\$ 3,487,714	\$ 3,571,980	\$ 3,661,184	\$ 4,311,327	\$ 4,202,342
Expenditures ²	3,029,677	2,733,837	2,613,401	2,997,855	3,764,617	3,592,007
Net	\$ 95,765	\$ 753,877	\$ 958,579	\$ 663,329	\$ 546,710	\$ 610,335
Net Operating Income	\$ 2,569,379	\$ 1,819,677	\$ 2,492,536	\$ 2,802,128	\$ 2,599,470	\$ 2,982,325

¹ Reserves shown are based on Unassigned General Fund Balance and Committed to Contingency Reserves.

² Expenditures exclude capital outlays due to the impacts on %'s.

Source: OC LAFCO Fiscal Indicators, Berkson & Associates



Yorba Linda Water District Established January 2, 1959⁴ Independent Special District	
District Information	
Address	1717 E. Miraloma Ave., Placentia, CA 92870
Primary Contact	Mark Toy, General Manager
Contact Information	714-701-3020
Website	www.ylwd.com
Governance	5-Member Board of Directors, Elected At-Large; General Manager Appointed by Board
Total Agency Staff	81 full-time, and 2 part-time
Service Area Information	
Jurisdictional Boundary Area (Sq. Mi.)	22.62
Communities Served	City of Yorba Linda, portions of the City of Placentia and City of Brea, and unincorporated Orange County
Population in Boundary	78,048
Water Infrastructure Totals	
Wells	10
Water Connections	25,385
Miles of Water Infrastructure	352
Estimated Age of Water Infrastructure	25 years old
Wastewater Infrastructure Totals	
Wastewater Connections	24,700
Miles of Wastewater Infrastructure	270
Manholes	6,297
Estimated Age of Wastewater Infrastructure	40 years old

⁴ Yorba Linda Water District formation dates to December 6, 1909, with the establishment of the Yorba Linda Water Company which later transitioned into the Yorba Linda Water District in 1959.

Demographic Summary

Population & Density	Agency	County
2020 Population	79,917	3,186,196
2025 Population	78,048	3,166,250
2030 Population ¹	77,282	3,173,544
2025-2030 Projected Annual Growth Rate (%)	-0.20% <	0.05%
Daytime Population	68,569	3,186,196
Unincorporated SOI Population	78,074	-
Households	27,053	1,099,078
Household Size	2.89 >	2.88
Area (Square Miles)	22.62	798.83
Density (Persons per Square Mile)	3,451 <	3,964
Housing		
Housing Units	27,815	1,158,955
Owner Occupied (%)	81.2% >	55.9%
Renter Occupied (%)	18.8% <	44.1%
Vacant (%)	2.7% =	5.2%
Median Home Value	\$ 1,248,883 >	\$ 1,012,468
Employment & Poverty		
Businesses	3,376	164,032
Employees	25,313	1,553,450
Median Household Income	\$ 154,744 >	\$ 115,723
Public Transportation Commuters (%)	0.4% <	1.2%
Commute Longer than 60 Minutes (%)	11.7% >	8.3%
Poverty Rate	6.6% <	9.6%

¹ 2030 Population estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI Business Analyst

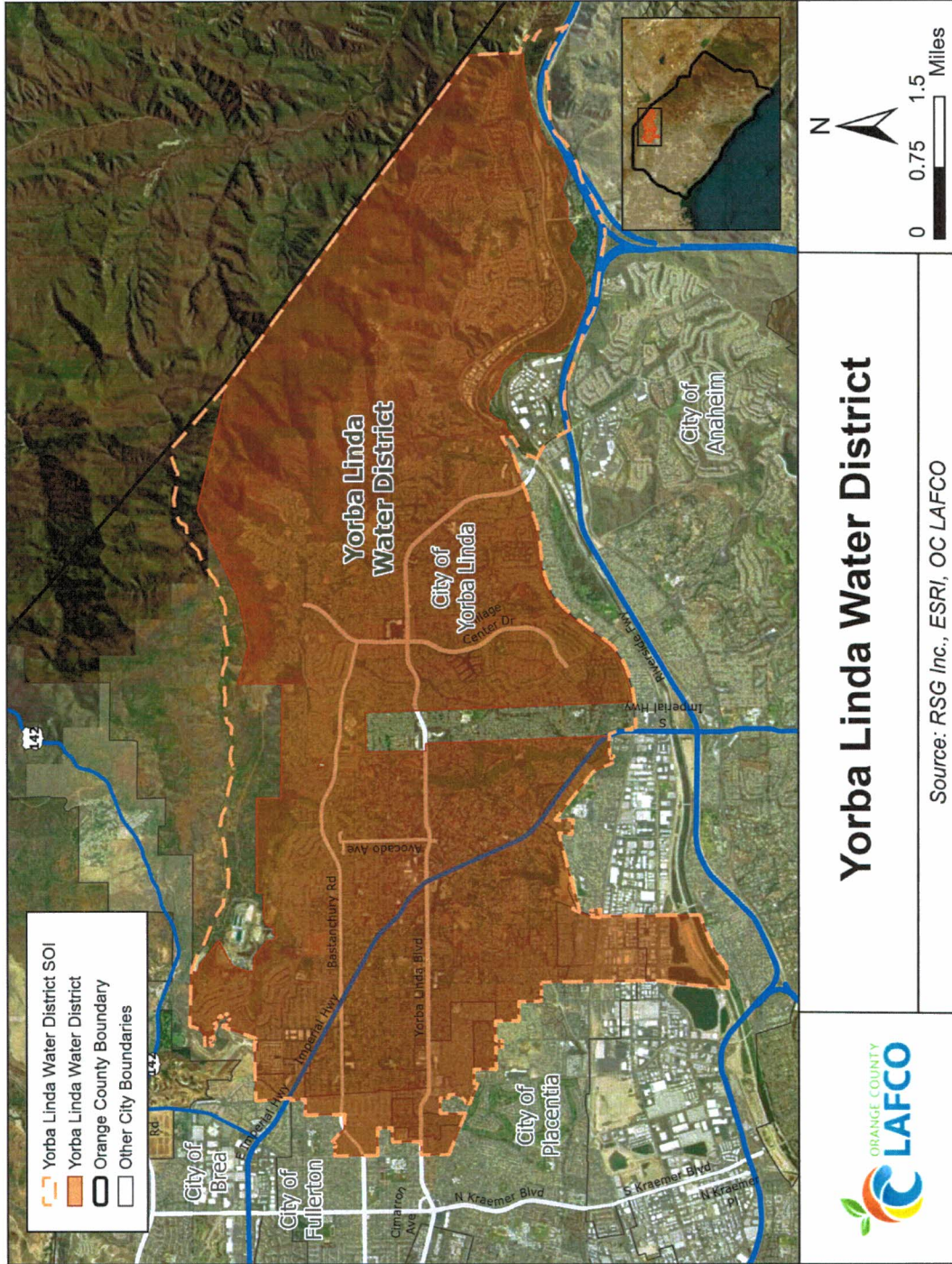
Financial Summary

Yorba Linda Water District

Financial Summary ¹	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Revenue	\$ 37,070,948	\$ 39,580,033	\$ 42,819,325	\$ 45,522,454	\$ 46,183,506	\$ 55,013,930
Expenditures	37,682,295	41,766,101	45,057,377	47,123,477	45,618,583	52,650,707
Net	\$ (611,347)	\$ (2,186,068)	\$ (2,238,052)	\$ (1,601,023)	\$ 564,923	\$ 2,363,223
Net Operating Income	\$ 11,075,303	\$ 13,840,027	\$ 15,335,639	\$ 15,275,541	\$ 22,168,454	\$ 33,591,567

¹ Reserves shown are based on Unassigned General Fund Balance and Committed to Contingency Reserves.

Source: OC LAFCO Fiscal Indicators, Berkson & Associates



IV. GROWTH AND POPULATION PROJECTIONS

Pursuant to Government Code Section 56430, MSRs make determinations on seven (7) required topics, including:

- 1. Growth and population projections for the affected area.*

The North Region covers an incorporated population of approximately 366,043 covering the five cities under review, and a total population including unincorporated areas of approximately 496,513. The two special districts covered in this MSR in the North Region provide services to approximately 130,470 people.

ESRI projects that the incorporated cities in the North Region are expected to experience a slight increase in population by 2030, with cities growing by 0.3 percent annually. The special districts in the North Region are expected to experience a slight decline in population, by 0.1 percent annually, over the next five years. ESRI projects that housing unit growth, like population growth, will be positive across the North Region.

Development of new housing units has slowly picked up in recent years. Estimates from ESRI show that the North Region cities developed approximately 9,235 new units, an increase of 0.5 percent, between 2020 and 2025. ESRI projects that the cities will increase their housing supply by 0.3 percent annually over the next five years.

Table 4 shows both population and housing trends for the North Region.

Table 4: Regional Population and Housing Trends

North Region

Population	Cities	Special Districts	County
2020 Population	371,635	132,655	3,186,196
2025 Population	366,043	130,470	3,166,250
2030 Population ¹	372,319	129,512	3,173,544
2020-2025 Annual Growth Rate (%)	-0.3%	-0.3%	-0.1%
2025-2030 Projected Annual Growth Rate (%)	0.3%	-0.1%	0.0%
Housing			
2010 Units	121,556	42,992	1,048,240
2020 Units	129,306	45,435	1,129,138
2025 Units	130,791	45,809	1,158,955
2030 Units ¹	132,937	46,386	1,184,171
2025 Household Size	2.8	2.8	2.7
2010-2025 Unit Annual Growth Rate (%)	0.5%	0.4%	0.7%
2025-2030 Projected Unit Annual Growth Rate (%)	0.3%	0.3%	0.4%

¹ 2030 estimates are only projections.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI Business Analyst

RSG has not included individual population projections for each of the agencies. The COVID-19 pandemic created unique migration patterns in the United States, with many urban areas rapidly gaining population in 2020, then losing said gains by 2023. RSG's projections show that the cities of the North Region will grow in the future, but data provided by DOF and ESRI are not aligned on how much. Additionally, both DOF and ESRI diverge from some agencies' self-reported housing development pipelines which can include units under construction, but also projects approved that may or may not be built in the near future. For these reasons RSG has opted to display a summary of the region's historical and projected growth, capturing what is occurring regionally rather than by a side-by-side comparison of each of the agencies.⁵

According to OC LAFCO's SOI maps, two of the five cities reviewed as a part of this MSR have unincorporated areas within their SOI which together total approximately 13.9 square miles. These unincorporated areas of the County do not include any DUCs and are located within the SOI of the cities of Brea and Yorba Linda.

⁵ See each agency profile for historical and projected population numbers.

According to ESRI, the unincorporated area within the SOI of Brea experienced a slight population increase between 2020 and 2025 whereas the unincorporated area within the SOI of the City of Yorba Linda experienced a decline. Similarly, future growth in the unincorporated SOI areas of these cities is expected to remain stagnant or slightly decline, with Brea experiencing no growth and Yorba Linda experiencing a slight decline. ESRI projects that the SOI of Brea and Yorba Linda will not have any housing growth over the next five years. Table 5 shows detailed demographic information for each of the cities that have inhabited, unincorporated area within their SOIs.

Table 5: Demographic Information for Unincorporated Area Within SOI

North Region		<i>Unincorporated Only</i>	
Population		Brea SOI	Yorba Linda SOI
	2010 Population	27	2,908
	2025 Population	30	2,818
	2030 Population ¹	30	2,755
	2010-2030 Population Annual Growth Rate (%)	2.22%	-1.05%
Housing			
	2025 Housing Units	7	1,057
	Owner (%)	0%	0%
	Renter (%)	0%	0%
	Vacant (%)	100%	100%
	2030 Housing Units ¹	7	1,057
	2025-2030 Housing Unit Annual Growth Rate (%)	0.00%	0.00%
Economy			
	2025 Businesses	-17	52
	2025 Employees	-210	110

¹ 2030 estimate is a projection only.

Source: US Census Bureau, DOF Population and Housing Estimates (Cities), ESRI Business Analyst

V. PRESENT AND PLANNED LAND USES

Per Government Code Section 56425, a LAFCO shall consider and prepare a written statement of its SOI determinations on five (5) factors, including:

- 2. The present and planned land use in the area, including agricultural and open space lands.*

The cities within the North Region are substantially built out, with limited remaining land available for new development outside of areas designated for open space. Across the region, land use patterns are dominated by residential development, which represents the vast majority of parcels in each city, particularly in communities such as Fullerton, La Habra, Placentia, and Yorba Linda where residential uses exceed approximately 80% of total parcels. Brea reflects a slightly more balanced distribution, though residential use still comprises the largest share.

Commercial and industrial uses are present in all cities but represent a relatively small proportion of total land use, generally accounting for only a small percentage of parcels. Mixed-use and office/professional designations are also limited, indicating that most cities maintain traditional land use patterns with clearly defined residential and non-residential areas rather than extensive mixed-use development.

Open space and public uses constitute a modest share of land across the region, supporting recreational, institutional, and environmental functions. Agricultural uses are minimal to nonexistent in the North Region, reflecting the highly urbanized nature of these communities.

Given the largely built-out conditions, future growth within the North Region is expected to occur primarily through infill development, redevelopment, and intensification of existing uses. Opportunities for expansion through annexation or conversion of undeveloped land are limited, and any changes in land use are likely to occur incrementally through rezoning or redevelopment of underutilized parcels. Details of each city's land use are provided in Table 6 below and further described in the following section.⁶

⁶ Percentages displayed in Table 6 are rounded to the first decimal which may make the percentages appear above 100 percent.

Table 6: North Region Cities Land Use

City of Brea⁷		
Land Use Type	Parcel Count	%
Commercial	199	1.72%
Industrial	364	3.15%
Mixed-Use	291	2.52%
Office / Professional	0	0.00%
Agriculture	763	6.61%
Public	1,335	11.56%
Residential	7,694	66.63%
Specific Plan	902	7.81%
Total	11,548	100.0%
City of Fullerton		
Land Use Type	Parcel Count	%
Commercial	721	2.41%
Industrial	491	1.64%
Mixed-Use	152	0.51%
Office / Professional	196	0.66%
Agriculture	2,875	9.62%
Public	323	1.08%
Residential	24,232	81.07%
Specific Plan	901	3.01%
Total	29,891	100.0%
City of La Habra		
Land Use Type	Parcel Count	%
Commercial	469	3.67%
Industrial	214	1.68%
Mixed-Use	7	0.05%
Office / Professional	22	0.17%
Agriculture	72	0.56%
Public	135	1.06%
Residential	11,853	92.80%
Specific Plan	0	0.00%
Total	12,772	100.0%
City of Placentia		
Land Use Type	Parcel Count	%
Commercial	134	1.04%
Industrial	223	1.73%
Mixed-Use	0	0.00%
Office / Professional	42	0.32%
Agriculture	27	0.21%
Public	30	0.23%
Residential	9,756	75.48%

⁷ Land use parcel counts were calculated using each cities current General Plan shapefile.

Specific Plan	2,714	21.00%
Total	12,926	100.0%
City of Yorba Linda		
Land Use Type	Parcel Count	%
Commercial	270	1.32%
Industrial	102	0.50%
Mixed-Use	0	0.00%
Office / Professional	0	0.00%
Agriculture	59	0.29%
Public	518	2.53%
Residential	19,505	95.36%
Specific Plan	0	0.00%
Total	20,454	100.0%

Pursuant to Government Code Section 65302(c), general plans must include a housing element explaining how the City and/or County will meet its part of the regional housing need. The County is part of the Southern California Association of Governments planning agency, which established jurisdictional housing goals for the 6th Round planning cycle (2021 through 2029); these goals are known as the Regional Housing Needs Allocation (“RHNA”) and are shown in Table 7. Each city is required to prepare and seek HCD approval of their local housing element.

Table 7: RHNA Requirements for North Region Cities

City	RHNA Requirement (2021-2029)
Brea	2,365
Fullerton	13,209
La Habra	804
Placentia	4,398
Yorba Linda	2,415

Government Code Sections 65400 and 65700 require all jurisdictions to submit annual progress reports on their respective general plan and housing element by April 1 for the prior year. The cities in the North Region have submitted their annual progress reports for 2024.⁸ Annual progress reports for 2025 are due on April 1, 2026; the cities in the North Region separately confirmed they have submitted their report by this deadline.⁹

⁸ HCD did not have information on 2025 submissions publicly available during the time of this report.

⁹ The City of Brea staff informed RSG of their Annual Progress Report submittal in March 2026.

Following are individual agency notes on development and land use:

The City of Brea's current development pipeline as detailed in its Project Updates as of March 2026, includes several residential and mixed-use projects at various stages of planning and construction. These include the following: Brea Mall Mixed-Use project, which proposes 380 dwelling units; South Brea Townhomes, a 179-unit project currently in plan check and mid-review, with ready-to-issue permits for two of the four buildings and grading anticipated to begin in 2026; Mercury Senior Apartments, an 85-unit project that has been entitled and approved and is currently awaiting the applicant's funding milestones prior to additional permit submittals; and the Canyon Apartments, also referred to as the "Brea Mall" project, a 377-unit development with construction underway, including shoring installation and issued grading permits.

In addition, the long-term Brea 265 project proposes approximately 1,100 dwelling units to be developed over an estimated 25-year period in three phases, with initial building permit submittals anticipated by the end of 2026.

In parallel with these development efforts, the City of Brea is advancing a focused General Plan update and a Core Area Specific Plan. A draft of these planning documents was prepared in early February 2026, with a final community open house conducted on March 12, 2026, to support public review and input. As of the release of this draft, the City has indicated that the General Plan will be taken to their City Council in early June.

- The City of Fullerton reported that it is currently not on track to meet its RHNA of 13,209 units by 2029, with approximately 2,000 units identified to date. Near-term development activity appears to be moderate, with the completion of The Hub mixed use project at 2601 East Chapman Avenue and approximately 400 units anticipated to begin construction this year. This includes a mixed-use project that proposed the construction of 329 apartments known as the "Atlas Fullerton". In addition, other planned projects involve the construction of various single-family residences,

townhomes, and retail store fronts as part of the “Pines at Sunrise Village”.¹⁰ Other projects in the pipeline involve residential, commercial, and mixed-used projects.

During the agency interview, the City of Fullerton noted that broader development activity may be influenced by ongoing financial constraints affecting developers in the current real estate market, which could impact the pace of new housing production. Further, the City confirmed as interest rates have dropped, some projects have commenced as a result of better financing options.

According to the City's Housing Element for the 2021–2029 planning period, which was adopted by the City Council on January 7, 2025, Fullerton has made progress on several recent housing developments. Completed or ongoing projects include a 290-unit mixed-use development at 600 W Commonwealth Avenue, which includes 10 moderate-income units; a 142-unit project on Harbor Boulevard; Habitat for Humanity developments consisting of eight completed units and four units under construction; the Compass Rose project with 46 units, including 12 three-bedroom units; and a 65-unit, 100 percent affordable development at 1600 W Commonwealth Avenue. In addition, the City has several approved or pending projects that collectively account for approximately 2,558 units across a range of affordability levels, including 67 very low-income units, 133 low-income units, 131 moderate-income units, and 2,227 above-moderate-income units. Notable projects include Casa Bella, Pathways of Hope, and Coyote Hills West.

To support additional housing development, Fullerton indicated it has received grant funding via the REAP 2.0 program, and intends to utilize these resources to facilitate the addition of new housing units. With respect to long-range planning, the City reported that its Housing Element has been reviewed and approved by HCD, providing a policy framework to guide future housing development and help address identified housing needs.

¹⁰ The City of Fullerton project information is from the “Project Listing” section on the city's website.

- The City of La Habra's current development pipeline as detailed in its "Active Development Applications" (between November 2023 and November 2025), includes the demolition of the golf course located off La Habra Hills Drive with the proposed construction of 534 dwelling units; development of 32 townhomes located on 151 and 221 W Whittier Boulevard; proposed mixed-use project involving the construction of 19,320 square feet of commercial retail, and 63 multi-unit dwellings. Other development projects are minor in scope.

According to the City of La Habra's General Plan, La Habra incorporates policies to support affordable and equitable housing, including consideration of inclusionary housing requirements and support for special needs populations. In addition, the City's planning framework includes sustainability and resilience considerations, such as compliance with green building standards, promotion of walkability, and addressing environmental and hazard risks.

La Habra's General Plan was last comprehensively updated in 2014. More recently, the City Council adopted the 2021–2029 Housing Element on September 19, 2022, and HCD determined on April 21, 2023, that the Housing Element is in substantial compliance with State law.

- The City of Placentia's current development pipeline as detailed in its "Pending Development Project List" as of February 2025, includes the proposed construction of 140 condominiums/townhomes situated off 440 N. Jefferson Street; development of 68 affordable housing units located off Baker Street which was approved in March 2024; proposed mixed-use project involving the construction of 248 units consisting of commercial and residential uses. Other development projects are minor in scope.

The City of Placentia's General Plan adopted in October 2019, supports redevelopment of underutilized and deteriorating properties, encourages adaptive reuse, and

promotes high-quality, compatible development through design guidelines and buffering of higher density uses from established neighborhoods. Infrastructure and service planning is also a key consideration, with Placentia evaluating the potential impacts of new development on public services, including police, fire and emergency response, parks, and wastewater systems, and considering appropriate timing and phasing of capital improvements.

Placentia's planning framework also incorporates sustainability and resource protection policies, including low-impact development standards, water quality protections, and enhancements to walkability and multimodal transportation options. While the General Plan identifies a theoretical buildout capacity of approximately 24,602 dwelling units, actual development potential may be influenced by the limited availability of vacant land and existing development patterns.

With respect to housing, the City of Placentia noted relatively lower RHNA obligations compared to neighboring jurisdictions and indicated an interest in collaborating with developers to support additional housing production, including affordable units. The City also noted challenges related to project feasibility, including instances where affordable housing projects have faced funding constraints, which may require reconsideration of development partnerships.

- The City of Yorba Linda's development pipeline, as detailed in its "Planning Division Major Projects Lists" as of October 2025, includes various proposed projects including the construction of a Senior Housing Development, comprised of 240 dwelling units situated on the southeast corner of Mariposa and Lakeview; and development of 62 dwelling units located off Yorba Linda Blvd, which City staff are confirming is consistent with the General Plan. Other development projects are minor in scope and primarily involve construction of single-family residences or the conversion of existing structures.

Yorba Linda promotes revitalization of commercial corridors and the downtown area through efforts such as the 2011 Town Center Specific Plan, which emphasizes mixed-use, entertainment, and civic-oriented development. Additional planning efforts, including the Shell Property and Murdock Property area plans, provide guidance for open space preservation and residential development, including proposed projects such as Cielo Vista and Esperanza Hills within the sphere of influence.

Consistent with its General Plan policies, the City of Yorba Linda seeks to ensure compatibility between new and existing development, to preserve natural landscapes and scenic corridors, and to coordinate infrastructure improvements with future growth. The City also supports the annexation of county islands to promote more efficient service delivery and cohesive planning.

With respect to housing, the City of Yorba Linda reported that its Housing Element has been certified and expressed confidence in meeting its RHNA obligations. Yorba Linda noted ongoing residential activity, including two multifamily projects currently in the entitlement process, continued development of accessory dwelling units, and a senior affordable housing project anticipated for City Council consideration. Additional projects include smaller-scale developments, such as the Messiah Lutheran project and a City Ventures project, as well as the ETCO Homes project, which have experienced delays due to financial constraints and may proceed under a new developer.

None of the agencies in the North Region contain notable agriculture, grazing, or farmlands.

VI. LOCATION AND CHARACTERISTICS OF ANY DUCS

Pursuant to Government Code Section 56430, MSRs make determinations on seven (7) required topics, including:

- 2. The location and characteristics of any disadvantaged unincorporated communities within or contiguous to the sphere of influence(s).*

Per Government Code Section 56425, a LAFCO shall consider and prepare a written statement of its SOI determinations on five (5) factors, including:

- 4. The existence of any social or economic communities of interest in the area if the commission determines that they are relevant to the agency.*

The CKH Act defines a Disadvantaged Unincorporated Community (“DUC”) as “inhabited territory, as defined by Gov. Code Section 56046, or as determined by commission policy, which constitutes all or a portion of a “disadvantaged community” as defined by Section 79505.5 of the Water Code.” Inhabited territory is defined as an area within which 12 or more registered voters reside. “Disadvantaged Community” in Water Code Section 79505.5 is defined as “a community with an annual median household income that is less than 80 percent of the statewide annual median household income.”

Senate Bill 244 (Wolk; effective January 1, 2012) imposed several new MSR requirements regarding DUCs. The Legislature found DUCs lack access to basic infrastructure, including but not limited to, streets, sidewalks, storm drainage, clean drinking water, and adequate sewer service. The purpose of the new requirements was to include DUCs in the scope of MSR and SOI updates prepared by each LAFCO to avoid a situation where an agency might exclude a DUC from a future annexation or provision of key services, such as water and sewer. The CKH Act – as defined under Government Code Section 56430 (2)(3) and 56425 (e)(5) - requires an MSR to include determinations regarding the present and probable need for public facilities or services related to water, sewer, and fire in any DUC that is within an existing sphere of influence.

OC LAFCO designated North MSR Region does not contain any Disadvantaged Unincorporated Communities (“DUCs”).¹¹

¹¹ Based on OC LAFCO's recent analysis of the updated data.

VII. CAPACITY OF FACILITIES AND ADEQUACY OF SERVICES

Pursuant to Government Code Section 56430, MSRs make determinations on seven (7) required topics, including:

- 3. Present and planned capacity of public facilities and adequacy of public services, adequacy of public services, infrastructure needs, or deficiencies related to sewers, municipal and industrial water, and structural fire protection in any disadvantaged, unincorporated communities within or contiguous to the sphere of influence.*

Per Government Code Section 56425, a LAFCO shall consider and prepare a written statement of its SOL determinations on the five (5) factors, including:

- 2. The present and probable need for public facilities and services in the area;*
- 3. The present capacity of public facilities and adequacy of public services that the agency provides or is authorized to provide; and*
- 5. The present and probable need for those public facilities and services of any disadvantaged unincorporated communities within the existing sphere of influence.*

Overall, agencies in the North Region are providing adequate services to their residents and customers. Some constraints, as it relates to deferred maintenance and backlogs, exist for most of the agencies, most notably for road maintenance services. Additionally, many of the agencies require substantial infrastructure improvements to their water and wastewater systems that come with significant capital costs. This section of the report discusses the major public services provided by the agencies in the North Region and their capacity to deliver those services with the existing staff and public facilities.

LAW ENFORCEMENT

The Orange County Sheriff's Department provides law enforcement services to one city in the Region, the City of Yorba Linda. The remaining four cities in the North Region – Brea, La Habra, Fullerton, and Placentia – operate their own police departments. These departments provide a full range of general law enforcement services including traffic enforcement, patrols, investigations, records, and community outreach/education. Each city also maintains a SWAT team who respond to critical incidents such as hostage situations, barricaded suspects, high-risk warrants, and threats to public safety. The one exception is the City of Yorba Linda whose SWAT team is provided by the County.

Due to the variability and limited comparability of calls-for-service data across agencies, RSG did not collect or analyze agency calls-for-service data as part of this MSR. This approach is consistent with the prior MSRs for the West, Southwest, and Central Regions that RSG has completed for OC LAFCO. Obtaining consistent and reliable data for each agency can be challenging due to different reporting practices, data availability, and classification methods. Instead, RSG relied on information that was readily available and comparable across agencies, including agency websites, publicly available program descriptions, and interviews from city representatives.

Following are specific individual agency findings:

- The City of Fullerton Police Department established three call response areas (Zone 1, Zone 2, and Zone 3), with each zone being assigned a patrol lieutenant designated as the Area Commander for each respective zone. This Area Commander model provides a single point of contact for residents that fall within each Zone an opportunity to voice their concerns, which may include crime, traffic, and quality of life issues (i.e., homelessness, graffiti, apartment complex condition, etc.).
- The City of La Habra provides various online resources to inform the public on items such as emergency preparedness, including AlertOC, which reports important emergency events to the public. La Habra also provides an online police report system where residents can report various crimes from the convenience of their own homes.
- The City of Brea Police Department facilitates a Community Watch program wherein volunteers from both residential and business communities come together to patrol areas they represent, distribute crime prevention materials, and participate in regular meetings where issues are addressed.
- The City of Placentia offers a mobile app “iPlacentia” wherein residents can submit service requests to the City for various issues including graffiti, outages, potholes, etc. This app does not allow residents to report crimes. The city offers a mobile app called “Nixle” for residents to receive important news or updates on emergency events.

- The City of Yorba Linda contracts with the Orange County Sheriff's Department ("OCSD") for law enforcement services, which include dedicated patrol coverage, special investigations, traffic and collision enforcement, parking enforcement, and crime prevention services. Through this partnership, the City also receives community safety education resources via OCSD's Stay Safe OC program, which provides information on home and vehicle security, personal safety, and identity theft prevention. OCSD additionally provides a public crime mapping tool that allows residents to review recently-reported incidents within the City.¹²

Based on interviews with city representatives, no concerns were reported regarding the quality or adequacy of law enforcement services in the North Region. Therefore, with the information RSG was able to ascertain from available sources coupled with the agency testimonials from interviews, it is determined that the agencies in the North Region currently have the capacity to continue to provide law enforcement services to existing residents at the present level of service.

FIRE PROTECTION, EMERGENCY MEDICAL, AND AMBULANCE TRANSPORT

The Orange County Fire Authority ("OCFA") provides fire protection and emergency medical services to one city in the North Region, the City of Yorba Linda. The remaining cities provide fire protection and emergency medical services through their respective fire departments, with the exception of the City of La Habra, which relies on the Los Angeles County Consolidated Fire Protection District ("CFPD"), emergency medical services, and ambulance transport.

The City of Yorba Linda, through its contract with OCFA, also receives ambulance transport service through a private provider, Emergency Ambulance Services, Inc. ("EAS"), which has a long-standing contractual relationship with OCFA. The City of Placentia directly contracts with EAS for ambulance transport, whereas the City of Fullerton contracts with another private provider, Falck Mobile Health Corp. ("Falck"). However,

¹² Additional information can be found at OCSD's website <https://www.ocsheriff.gov/commands-divisions-0>.

Fullerton is in the process of bringing ambulance transport services in-house through their Fire Department, replacing their existing contract with Falck. According to a city staff report from April 2025, the City of Fullerton anticipates this being implemented as early as Spring of 2026. The City of Brea also recently transitioned to bring ambulance transport services in-house via their fire department as of January 2025. Please refer to Table 8 below for additional details.

Table 8: Fire Protection and Emergency Medical Service

City of Brea	
Service Area	City of Brea
Fire Station Count	4
Number of Dedicated Staff	80
Total Incidents (2024)	4,896
Average Emergency Medical Response Time	6 minutes and 07 seconds
City of Fullerton	
Service Area	City of Fullerton
Fire Station Count	6
Number of Dedicated Staff	7 Chief Officers, 72 firefighters, 4 fire prevention staff, 3 professional staff, 1 emergency manager, 1 EMS Coordinator, and 40 CERT-qualified volunteers
Total Incidents (2025)	16,891 ¹³
Average Emergency Medical Response Time	7 minutes
City of La Habra	
Service Area	City of La Habra
Fire Station Count	4
Number of Dedicated Staff	4,700 ¹⁴
Total Incidents (2024)	4,099
Average Emergency Medical Response Time	Less than 5 minutes
City of Placentia	
Service Area	City of Placentia
Fire Station Count	2
Number of Dedicated Staff	30
Total Incidents (2024)	1,513
Average Emergency Medical Response Time	4 min and 54 seconds

¹³ The City of Fullerton Fire Department confirmed the incident totals align with annual trends and reflect their widespread socioeconomic and elderly population within their service area.

¹⁴ The City of La Habra does not maintain its own Fire Department. Therefore, the figures here represent the number of fire personnel dedicated to LA County Fire Department based on their 2017-2021 Strategic Plan.

City of Yorba Linda	
Service Area	City of Yorba Linda
Fire Station Count	3
Number of Dedicated Staff	16
Total Incidents (2024)	4,962
Average Emergency Medical Response Time	8 minutes and 38 seconds

Following are additional specific individual agency findings¹⁵:

- The City of Brea provides fire protection and emergency medical service through its Fire Department and four fire stations. As of January 2025, Brea developed an in-house ambulance program thereby replacing their contract model with the private company, EAS. Brea's Fire Department provides 24-hour emergency response to a variety of critical events such as fires, explosions, hazardous materials incidents, medical emergencies, traffic/collision accidents, and other public assistance requests. Based on the City of Brea's website and information provided by the Fire Department, Brea's fire station¹⁶ and call volumes¹⁷ as of 2024 are as follows:
 - Station 1 is located at 555 N Berry St and had a total call volume of 1,908 incidents.
 - Station 2 is located at 200 N Brea Blvd. and had a total call volume of 4,960 incidents.
 - Station 3 is located at 2600 E Santa Fe Rd. and had a total call volume of 3,240 incidents.
 - Station 4 is located at 198 Olinda Pl. and had a total call volume of 245 incidents.

The City of Brea further confirmed the Fire Department's 2024 average dispatch arrival time for emergency medical incidents of 6 minutes and 07 seconds.¹⁸

¹⁵ RSG relied on a combination of information readily available online, as provided by each agency, and by fire service Annual Reports, mostly from 2020. More recent Annual Reports are referenced where available.

¹⁶ All of Brea Fire Department Stations operate 24/7.

¹⁷ Figures represent the total number of responses coming from each of the Fire Stations and do not reflect total unit responses as some calls may be canceled.

¹⁸ Information is based on figures provided by the City of Brea Fire Department.

The City of Brea did not express any concerns or issues with its fire protection, emergency medical or ambulance transport services. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Fullerton provides fire protection and emergency medical service through its Fire Department and six fire stations. Fullerton's Fire Department provides 24-hour emergency response to a variety of critical events such as fires, explosions, hazardous materials incidents, medical emergencies, traffic/collision accidents, and other public assistance requests. Based on the City of Fullerton's website and their Fire Department's Annual Report for 2020, Fullerton's fire station and unit response¹⁹ information is as follows:

- Station 1 is located at 312 E. Commonwealth Ave and had a total of 4,289 incidents.
- Station 2 is located at 1732 W. Valencia Drive and had a total of 3,497 incidents.
- Station 3 is located at 700 S. Acacia Ave and had a total of 1,918 incidents.
- Station 4 is located at 3251 N. Harbor Blvd. and had a total 2,298 incidents.
- Station 5 is located at 2555 E. Yorba Linda Blvd. and had a total of 2,323 incidents.
- Station 6 is located at 198 Olinda Pl. and had a total of 1,759 incidents.

The City of Fullerton's Fire Department Annual Report for 2020 further confirmed the City of Fullerton provided an average dispatch arrival time for emergency medical incidents of 5 minutes and 43 seconds with 91.0% of response time falling under 8 minutes. Fullerton's structure fire response times averaged 5 minutes and 34 seconds.

The City of Fullerton expressed concerns regarding certain aspects of fire and EMS service delivery. City staff noted that they secured a grant to fund the hiring of an additional crew and relocated personnel from Station 1 to Station 2 to improve

¹⁹ Unit response represents any time a unit responds within or outside of their jurisdiction; this can result in multiple units responding to the same incident.

deployment coverage. However, the ladder truck assigned to serve the area is currently stored at Station 6, which is about 3 miles away from the Station 2, which may affect response times for structure fires and specialized incidents.²⁰ However, city staff confirmed that the ladder truck will be relocated to Station 1 thereby reducing the distance about 0.5 miles from Station 2.

Despite the cited concerns above, RSG did not identify any notable concerns tied to the efficiency or adequacy of providing fire protection, EMS, and ambulance transport services for residents within the City of Fullerton.

- The City of La Habra has contracted the Los Angeles County Consolidated Fire Protection District (“CFPD”) for fire protection and emergency medical services since 1996. The agreement was most recently amended in July 2024 with a prescribed contract cost of approximately \$14.4 million for FY 24-25.

The City has four fire stations: Station 191, 192, 193 and 194. Additional details are as follows:

- Station 191 is located at 820 W. La Habra Blvd.
- Station 192 is located at 520 S. Harbor Blvd.
- Station 193 is located at 1000 West Risner Way but has been permanently closed since 2023. As part of an amendment to the service contract in September 2023, the Fire District and the City agreed to close Station 193 and revise staffing levels at other stations to maintain an acceptable level of emergency coverage while addressing contract cost considerations.²¹ The City of La Habra confirmed this station now serves as an ambulance hub for Falck Ambulance.
- Station 194 is located 13540 Beach Blvd.

²⁰ RSG was not provided the location for where the Ladder 2 Truck is stationed to confirm the distance from Station 2.

²¹ Based on information the Contract Amendment by LA County Fire Department September 12, 2023.

La Habra reported that it is currently negotiating with CFPD²² regarding anticipated increases in contract costs for fire protection services. La Habra staff indicated that the full fiscal impact of the prospective increase in contract costs had not been fully anticipated in prior budget planning. In November 2025, voters approved Measure V, which provides additional revenue to support municipal services; however, La Habra expressed concerns regarding its long-term ability to absorb higher fire service contract costs.

As part of previous cost-management efforts, the City of La Habra closed one fire station and converted the facility to an ambulance station to maintain emergency medical service coverage, while adjusting the remaining fire service operations.

While RSG was unable to obtain total fire incident data from the City of La Habra, the City provided response data specific to ambulance services. Notably, total ambulance response in 2024 and 2025 totaled 4,605 and 4,608, respectively, reflecting little change in demand. Meanwhile, ambulance transport increased modestly from 3,596 to 3,736 between 2024 and 2025.²³

Despite the cited concerns above, RSG did not identify any notable concerns tied to the efficiency or adequacy of providing fire protection, EMS, and ambulance transport services for residents within the City of La Habra.

- The City of Placentia provides fire protection and emergency medical service through its Fire Department and two fire stations. Placentia's Fire Department provides 24-hour emergency response for a variety of critical events such as fires, explosions, hazardous materials incidents, medical emergencies, traffic/collision accidents, and other public assistance requests. Between July 1, 2023, and June 30, 2025, the City reports having responded to 2,927 total incidents (calls for service).²⁴

²² Services are delivered through the Los Angeles County Fire Department.

²³ The City of La Habra attempted to get fire incident data from CFPD but was unable to obtain the data during the time of this report.

²⁴ The City of Placentia was unable to provide total incidents per station.

The City has two fire stations:

- Station 1 is located at 110 South Bradford Ave.
- Station 2 is located at 1530 North Valencia Ave.

The 2023-25 Biennial Report for Placentia Fire & Life Safety confirms the City responded to a total of 360 structural fire calls, 520 traffic collisions, 1,310 alarm/service calls, among others.²⁵ The Public Safety Communications Center Annual Report for 2024 documents a total of 1,513 calls for service that were fire department specific. This report further details that the Placentia Fire Department has one Engine, one Truck, two paramedic units, and one Battalion Chief. The City further confirmed that through their contract with EAS, they are provided two advanced life support (“ALS”) units staffed with four paramedics that operate within city limits at all times.

The City of Placentia did not express any concerns or issues with adequacy of fire protection and emergency medical services. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Yorba Linda receives fire protection and emergency medical service through its contract with the Orange County Fire Authority (“OCFA”). OCFA provides 24-hour emergency response to a variety of critical events such as fires, explosions, hazardous materials incidents, medical emergencies, traffic/collision accidents, and other public assistance requests. Based on information provided by Yorba Linda, OCFA's fire station information is as follows:
 - Station 10 is located at 18422 Lemon Drive and had a total of 3,074 incidents.
 - Station 32 is located at 20990 Yorba Linda Blvd., and had a total of 2,268 incidents.
 - Station 53 is located at 25415 La Palma Avenue and had a total of 603 incidents.

²⁵ Placentia responded to other call types per the Biennial report.

The City of Yorba Linda did not express any concerns with their existing contract for service with OCFA or cite any issues with the adequacy of fire protection and emergency medical services. RSG separately did not identify any notable concerns during the timing of this report.

Based on the assessment and findings above, RSG determines the agencies in the North Region currently have the capacity and adequacy of facilities to continue to provide fire protection, EMS, and ambulance transport services to existing residents at the present level of service.

WATER SERVICES

Water services in the North Region are provided by one water district (Yorba Linda Water District), and four of the five cities (Brea, Fullerton, La Habra, Placentia) provide retail water services to their residents. The City of Yorba Linda receives water services from Yorba Linda Water District. Yorba Linda Water District also provides services to portions of the cities of Brea, Placentia, and Anaheim, and to unincorporated areas in the County. Water infrastructure, including water mains and pumps, ranges in age from about 37 to 70 years old between each agency, with the City of La Habra having the oldest documented infrastructure at an average of 70 years, and the City of Yorba Linda with the youngest infrastructure at an average of 37 years.²⁶ The remaining agencies fall within the range of 40–50 years.

It is important to note that most water infrastructure has a useful lifespan that ranges between 50 to 100 years, depending on the materials, installation conditions, and maintenance practices. Portions of the agencies' systems installed prior to 1975 may be approaching or exceeding their expected service life and may require increased maintenance and phased replacement. Notably, the cities of Placentia and Fullerton have

²⁶ Information provided in the City of Placentia's General Plan suggests presence of water infrastructure dating back to 1910. However, during the time of the report, the City was unable to confirm average age of existing water infrastructure.

exceeded their useful lifespan and improvements may be merited. Table 9 presents an infrastructure inventory of the water providers in the North Region.

Table 9: Retail Water Service and Infrastructure

City of Brea	
Service Area	City of Brea
Average Age of Infrastructure ²⁷	45 Years
Number of Wells	1
Number of Water Connections	13,821
Miles of Infrastructure	228
Water Provider	City of Brea and Yorba Linda Water District
Water Supply Source(s)	Imported Groundwater (California Domestic Water Company) and imported water (the Municipal Water District of Orange County)
City of Fullerton	
Service Area	City of Fullerton
Average Age of Infrastructure	50 Years
Number of Wells	8
Number of Water Connections	32,144
Miles of Infrastructure	424
Water Provider	City of Fullerton
Water Supply Source(s)	Groundwater (Orange County Water District) and imported water (the Municipal Water District of Orange County)
City of La Habra	
Service Area	City of La Habra
Average Age of Infrastructure	70 Years
Number of Wells	3
Number of Water Connections	14,522
Miles of Infrastructure	165
Water Provider	City of La Habra
Water Supply Source(s)	Imported Groundwater (California Domestic Water Company) and imported water (the Municipal Water District of Orange County)
City of Placentia	
Service Area	City of Placentia
Average Age of Infrastructure	Not available ²⁸
Number of Wells	16
Number of Water Connections	2,578
Miles of Infrastructure	32
Water Provider	Golden State Water Company and Yorba Linda Water District

²⁷ Average water infrastructure age was based on information provided by agency staff and was not independently verified as part of this analysis.

²⁸ The City of Placentia informed RSG that external water providers operate majority of their water system – Golden State Water Company and/or Yorba Linda Water District. Therefore, Placentia was unable to confirm average age of water infrastructure at time of this report.

Water Supply Source(s)	Groundwater and imported water (Golden State Water Company) ²⁹ and Yorba Linda Water District
Yorba Linda Water District³⁰	
Service Area	City of Yorba Linda, and parts of the Cities of Placentia, Anaheim, Brea, and portions of unincorporated Orange County
Average Age of Infrastructure	37-40 Years
Number of Wells	10
Number of Water Connections	25,385
Miles of Infrastructure	352
Water Provider	Yorba Linda Water District
Water Supply Source(s)	Groundwater via Orange County Groundwater Basin (managed by Orange County Water District) and imported water (the Municipal Water District of Orange County)

The Municipal Water District of Orange County (“MWDOC”) provides wholesale water services to all cities in the North Region except for the City of Fullerton. MWDOC was formed in 1951 to import wholesale water from the Metropolitan Water District of Southern California, discussed above. MWDOC has a countywide service area that includes fourteen cities, thirteen special districts, and one private water agency, and it is governed by a seven-member board. In addition to wholesale water services, MWDOC also provides other water resources and programs within the North Region that include planning efforts in water supply development, water use efficiency, and water education and emergency preparedness.

Agencies in the North Region receive groundwater from various sources. For instance, several of the cities in North Region receive groundwater from private water companies; the cities of Brea and La Habra receive groundwater from the California Domestic Water Company, and the City of Placentia receives groundwater from the Golden State Water Company. The Golden State Water Company provides a blend of groundwater pumped from the Orange County Groundwater Basin and imported water from the Colorado River Aqueduct and State Water Project (imported and distributed by Metropolitan Water District

²⁹ Golden State Water Company receives groundwater from the Orange County Groundwater Basin and imports water from the Colorado River Aqueduct and State Water Project via Metropolitan Water District of Southern California.

³⁰ The Yorba Linda Water District is the service provider for the City of Yorba Linda.

of Southern California). Meanwhile, the California Domestic Water Company receives its water from the Main San Gabriel Basin via several groundwater wells.

The Orange County Water District (“OCWD”) manages additional sources of groundwater in the North Region and provides Yorba Linda Water District with a portion of its water supply. As noted in Table 9 above, Yorba Linda Water District provides water to the City of Yorba Linda and certain portions of the City of Placentia and Brea. Established in 1933, OCWD serves as the regional agency responsible for protecting Orange County’s Santa Ana River water rights and managing the groundwater basin underlying north and central portions of the county. The District is governed by a 10-member board comprised of representatives from 13 cities, five special districts (including Yorba Linda Water District), and one private water agency. OCWD’s policy direction focuses on promoting long-term groundwater reliability, water quality protection, and cost-effective, environmentally responsible basin management.

Following are specific individual agency findings³¹:

- The City of Brea operates a largely built-out potable water system serving approximately 45,600 residents through about 228 miles of distribution mains, seven reservoirs with 69.5 million gallons of storage, and five booster pump stations, with multiple interconnections providing system redundancy, according to the City’s Urban Water Management Plan 2021 (“UWMP”).

Brea’s water supply is primarily imported groundwater from the Main San Gabriel Basin via the California Domestic Water Company, supplemented by Metropolitan Water District of Southern California supplies through MWDOC and a limited amount of local La Habra Basin groundwater used for irrigation only.

Recent water demands have remained stable at roughly 9,100–10,000 acre-feet per year, with residential uses comprising just over half of total consumption, and long-term projections indicate modest growth of 2.1% between 2025 and 2045 with the

³¹ RSG relied on information from each agencies’ Water Master Plans and/or Urban Water Management Plans to inform this analysis.

projected potable water use for 2045 at 9,745 acre-feet. The City's reliability analysis concludes that available supplies are sufficient to meet projected demands under normal, single-dry, and multi-dry-year conditions through the planning horizon.

Analysis from the City of Brea's 2021 Water Master Plan indicates that water supply, storage, and pressure are generally sufficient to meet peak demand. However, some areas of the system that rely on the Berry Street Booster Pump Station may experience capacity limitations. Pipeline condition analysis found that approximately 162,000 linear feet of cast iron mains installed prior to 1970 have exceeded their expected service life and should be prioritized for replacement. To address system needs, the Water Master Plan identifies approximately \$18.8 million in capital projects to correct existing deficiencies, \$2.7 million in projects to improve system reliability, and \$103.8 million in projects associated with build-out and future development, indicating that continued capital investment will be necessary to maintain long-term reliability and capacity.

The City of Brea reported no current concerns regarding water supply reliability or service delivery, noting stable supply conditions, strong conservation measures, and sufficient flexibility to meet demand. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Fullerton operates a large, potable water system serving approximately 144,000 customers over about 22.3 square miles through roughly 424 miles of pipeline, 15 reservoirs with 67.5 million gallons of storage, 14 booster pump stations, eight active groundwater wells, and seven imported water connections, based on the City's 2025 Water Master Plan Update.

Fullerton's water supply is derived primarily from groundwater from the Orange County Groundwater Basin, managed by OCWD (approximately 73 percent of total supply) and supplemented by imported water from the Metropolitan Water District of Southern California (approximately 27 percent). Recent average annual water production has

been about 25,552 acre-feet per year³², with long-term demand projections based on the City's 2020 Urban Water Management Plan ("UWMP") indicating stable to modest growth through 2045, reflecting conservation trends and planned development.

System modeling and reliability analyses indicate that existing and planned facilities are generally sufficient to meet projected average and maximum day demands, and fire flow requirements, subject to implementation of recommended improvements. The Master Plan identifies no single quantified deferred maintenance backlog but documents widespread age-, condition-, and risk-based deficiencies across pipelines, pump stations, reservoirs, and wells. It recommends a comprehensive capital improvement program totaling approximately \$151 million over 20 years covering short-term, near-term, and long-term CIP. The Master Plan separately estimates costs for a dedicated pipeline repair and replacement program of about \$20.4 million annually to address high- and very high-risk assets and maintain long-term system reliability and capacity.³³

In addition, the City's 2020 UMWP projects potable water demand to increase modestly to approximately 27,850 acre-feet by 2045 and concludes that available groundwater and imported water supplies are sufficient to meet demands under normal, single-dry, and multiple-dry-year conditions, reflecting a diversified and drought-resilient supply portfolio.

The City of Fullerton noted that portions of its water infrastructure have been in service for several decades and are beginning to require more frequent maintenance and repair. As a result, there is an increasing need for ongoing investment to address system aging and support long-term reliability. The City indicated that while capital improvements are being planned and implemented, available funding may require prioritization and phased delivery of projects over time. Continued attention to

³² This figure is specific to the City of Fullerton's 10-year average water demands between 2011/12 and 2021/22.

³³ The City of Fullerton's Water Master Plan (2021) identified approximately \$982 million in pipeline repairs/improvements needed over the next 60-years.

infrastructure reinvestment will be important to help maintain service reliability, support regulatory compliance, and sustain current levels of service.

- The City of La Habra operates a potable water system serving approximately 63,100 residents within a 7.3-square-mile service area through about 165 miles of water mains, three reservoirs with 16.8 million gallons of storage, three groundwater wells, five booster pump stations, and 49 pressure-regulating stations across 19 pressure zones, according to the City's 2020 Urban Water Management Plan.

The City's water supply portfolio consists of a combination of imported groundwater from the Main San Gabriel Basin provided by the California Domestic Water Company, local groundwater from the La Habra Basin, and a limited amount of imported surface water from Metropolitan Water District of Southern California provided by MWDOC. In FY 2019-20, supplies were derived primarily from imported groundwater (68 percent) and local groundwater (31 percent), with imported surface water accounting for approximately 1 percent.

Water demands have remained relatively stable at an average of approximately 8,900 acre-feet per year with demands in FY 2019-20 resulted in approximately 8,591 acre-feet. Future demands are projected to increase only marginally to approximately 8,865 acre-feet by 2045, reflecting a largely built-out service area and modest population growth. The City's reliability assessment concludes that available local and imported supplies are sufficient to meet projected demands under normal, single-dry, and multiple-dry-year conditions through the planning horizon.

While the UWMP does not quantify a systemwide deferred maintenance backlog or total capital funding need, it documents ongoing reliance on capital planning through the City's Water Master Plan and regional coordination to address infrastructure needs, supply reliability, and regulatory compliance.³⁴

³⁴ RSG was unable to obtain a copy of the City of La Habra's Water Master Plan.

During the agency interview, the City of La Habra did not express any concerns about their water services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Placentia does not own, maintain, or operate a municipal potable water system. Instead, Placentia receives potable water services through an existing agreement with the Golden State Water Company. Placentia also receives water services for certain areas within the City from the Yorba Linda Water District.

To RSG's knowledge, the Golden State Water Company ("GSWC") is responsible for the preparation of the Urban Water Management Plan which would cover services in Placentia.³⁵ According to the Proposed 2019, 2020, 2021, and 2025-27 Infrastructure Investment and Water Rates provided by Placentia, GSWC is a California Public Utilities Commission ("CPUC")-regulated investor-owned utility serving approximately 16,200 customer in the Placentia service area. GSWC provides services to portions of the unincorporated communities of Cowan Heights and Lemon Heights, and portions of the cities of Orange, Santa Ana, and Yorba Linda.

GSWC's infrastructure planning and capital improvements are governed through the CPUC General Rate Case ("GRC") process, which establishes system investment and rate recovery on a three-year cycle. In its recent filings, GSWC identified over \$22 million in proposed infrastructure investments for the Placentia service area for 2025–2027, including reservoir replacements, groundwater well improvements, booster station upgrades, pipeline replacement, treatment equipment, and systemwide technology improvements.

In addition, limited areas within the City receive water service from Yorba Linda Water District, which prepares its own Urban Water Management Plan and Water Master Plan. The City provided the Municipal Water District of Orange County ("MWDOC") UWMP; however, MWDOC functions as a regional wholesale planning entity and is not the direct retail supplier to Placentia customers. Accordingly, infrastructure age, system

³⁵ RSG was unable to obtain a copy of the UWMP from the Golden State Water Company.

capacity metrics, and average demand data specific to the Placentia service area were not available for review as part of this MSR and are instead addressed through the respective retail provider planning documents.

The City of Placentia did not express any concerns or issues with adequacy of water services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The Yorba Linda Water District provides potable water service to approximately 25,000 connections across a 14,000-acre service area encompassing the City of Yorba Linda and portions of Placentia, Brea, Anaheim, and unincorporated Orange County, according to the District's 2020 Urban Water Management Plan Executive Summary³⁶. The District's system includes 10 groundwater wells, 12 booster pump stations, 14 reservoirs, approximately 352 miles of water mains, and multiple pressure zones and interconnections.

The District's water supply portfolio consists of a combination of local groundwater from the Orange County Groundwater Basin and imported water from Metropolitan Water District of Southern California via the Municipal Water District of Orange County. In FY 2019-20, supplies were approximately 53 percent groundwater and 47 percent imported water. This anomaly time period reflects the fact that YLWD groundwater wells were turned off in 2020 and 2021 due to PFAS contamination, thus requiring the use of 100% imported water during construction of a new water treatment plant. Upon completion of the treatment plant in FY 2021-22, YLWD returned to using 85% groundwater and 15% imported water. YLWD continues to maximize groundwater production at 85% of demand as permitted by the Orange County Water District. Existing annual water demand is approximately 19,867 acre-feet, with future demand projected to increase by about 8 percent by 2045 due to limited infill development and accessory dwelling units.

³⁶ Yorba Linda Water District provided RSG with copies of the Executive Summaries for the District's Water Master Plan and Urban Water Management Plan; full versions of these documents were not available for review at the time of analysis

Hydraulic modeling indicates the District's water system generally provides adequate service to meet current and project demands, including fire flow needs in most areas. However, the analysis from the 2022 Water Master Plan Executive Summary (Plan) identified some localized areas where improvements are needed to strengthen system redundancy, improve fire flow performance, address water age concerns, and support long-term reliability. To address these conditions and improve long-term reliability, the Plan identifies 71 capital projects over a 10-year period, totaling approximately \$144.5 million, and focused on condition-based asset replacement, fire flow improvements, groundwater production optimization, and system redundancy.

The District's UWMP concludes that available groundwater and imported water supplies are sufficient to meet projected demands under normal, single-dry, and multiple-dry-year conditions through 2045, reflecting a diversified and drought-resilient supply portfolio.

During the agency interview, the Yorba Linda Water District did not express any concerns about their water service capacity or facilities. RSG separately did not identify any notable concerns during the timing of this report.

Based on the assessments and findings above, RSG determines the agencies in the North Region currently have the capacity to continue to provide water services to existing residents at the present level of service. Urban Water Management Plans ("UWMPs") prepared for the cities of Brea, Fullerton, and La Habra, and the Yorba Linda Water District suggest that each agency maintains sufficient water supplies to meet projected demands under normal conditions, and that their systems are generally capable of meeting average day, maximum day, and fire flow requirements (some subject to identified recommended improvements).

However, these findings also indicate that much of the region's water infrastructure was constructed between 40 to 70 years ago and is approaching – or has exceeded – the end of its useful lifespan. Each agency has identified substantial capital improvements needed to address the aging infrastructure. Long-term capital plans among the agencies range

from tens of millions to well over \$100 million, as detailed above, and reflect the need for ongoing investment in condition-based replacement, system reliability, and regulatory compliance.

Therefore, continued service capacity appears contingent upon sustained funding and disciplined implementation of adopted capital improvement plans. While RSG finds existing systems currently adequate to meet service needs, failure to maintain investment levels or defer planned replacement may compromise long-term reliability. These risks are specifically pronounced for the cities of Fullerton and Brea, and the Yorba Linda Water District, who have documented significant capital improvements with high costs.

WASTEWATER

Wastewater services (collection and conveyance) in the North Region are provided by four of the five cities (Brea, Fullerton, La Habra, and Placentia) and the Yorba Linda Water District. The City of Yorba Linda receives wastewater collection and conveyance services from the Yorba Linda Water District. Table 10 below provides an inventory of the wastewater infrastructure provided by agencies in the North Region.

Table 10: Wastewater Service and Infrastructure

City of Brea	
Wastewater Service Provider	City of Brea
Average Age of Infrastructure ³⁷	45 Years
Number of Lift Station	3
Number of Manholes	12
Miles of Infrastructure	134
City of Fullerton	
Wastewater Service Provider	City of Fullerton
Average Age of Infrastructure	50 Years
Number of Lift Stations	N/A
Number of Manholes	12
Miles of Infrastructure	330
City of La Habra	
Wastewater Service Provider	City of La Habra
Average Age of Infrastructure	70 Years
Number of Lift Stations	Not applicable

³⁷ Average wastewater infrastructure age was based on information provided by agency staff and was not independently verified as part of this analysis.

Number of Manholes	2,680
Miles of Infrastructure	125
City of Placentia	
Wastewater Service Provider	City of Placentia, Yorba Linda Water District
Average Age of Infrastructure	50+ Years
Number of Lift Stations	N/A
Number of Manholes	2,300
Miles of Infrastructure	84
City of Yorba Linda	
Wastewater Service Provider	Yorba Linda Water District
Average Age of Infrastructure	66 +/- Years
Number of Lift Stations	1
Number of Manholes	5,635
Miles of Infrastructure	237
Yorba Linda Water District	
Wastewater Service Provider	Yorba Linda Water District
Average Age of Infrastructure	40
Number of Lift Stations	1
Number of Manholes	6,297
Miles of Infrastructure	267

All cities and the Yorba Linda Water District are part of the Orange County Sanitation District ("OCSD"), which is responsible for regional wastewater collection, treatment, and disposal services within central and northwest Orange County. OCSD owns and operates regional wastewater infrastructure within or serving portions of all cities in North Region. The District is governed by a 25-member board representative of 20 cities, four special districts, and the County of Orange. Table 11 provides an inventory of the infrastructure that is part of the OC Sanitation District.

Table 11: OC Sanitation District Infrastructure

Orange County Sanitation District	
Service Area	Entire North Region
Miles of Regional Pipelines	386
Miles of Local Pipelines	1.2
Number of Pump Stations	15
Number of Treatment Plants	2

Following are specific individual agency findings:

- The City of Brea owns and operates the local wastewater collection system consisting of approximately 134 miles of gravity sewer pipe, three lift stations, and two inverted

siphons, and conveys wastewater to the Orange County Sanitation District for regional treatment and disposal, according to the City's 2021 Sewer Master Plan.

The system serves an estimated average dry weather flow of approximately 4.9 million gallons per day under existing conditions. Hydraulic modeling conducted for the 2021 Sewer Master Plan indicates that only about 749 linear feet of pipeline (approximately 0.1 percent of the system) is currently capacity deficient, reflecting prior capital improvements and reduced per-capita wastewater generation associated with water conservation. Under near-term and full buildout scenarios, additional localized deficiencies are projected, particularly in areas tributary to the Carbon Canyon and Sphere of Influence sewer sheds. Condition assessment based on CCTV inspection of approximately 81 percent of the system identified that about 4.3 percent of inspected pipelines exhibit severe structural defects (Grade 5) requiring prioritized rehabilitation or replacement.

The 2021 Sewer Master Plan identifies a capital improvement program focused on capacity upgrades, lift station rehabilitation, siphon improvements, and condition-based pipeline replacement to address both existing and future deficiencies and maintain long-term system reliability. These infrastructure investments complement the City's 2016 Sewer System Management Plan, which establishes preventive maintenance, fats-oils-and-grease ("FOG") control, and overflow response procedures to ensure regulatory compliance and minimize sanitary sewer overflows.

The City of Brea did not express any concerns or issues with adequacy of wastewater services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Fullerton owns and operates a gravity-only wastewater collection system serving approximately 32,000 sewer connections across the City's 22-square-mile service area, according to the 2024 City of Fullerton's Sewer Master Plan. The system consists of approximately 330 miles of gravity sewer mains, 35 inverted siphons, and multiple diversion manholes, and conveys all wastewater to the Orange County

Sanitation District for regional treatment and disposal; the City does not operate any lift stations, force mains, or treatment facilities.

Existing average dry weather flow is estimated at approximately 9.2 million gallons per day (“mgd”), with projected increases to about 12.0 mgd by 2030 and 12.4 mgd by 2045 due to planned development and RHNA growth. Hydraulic modeling indicates that the system generally operates within capacity under dry weather conditions; however, two localized pipeline segments were identified as deficient under peak wet-weather conditions based on stress-testing and historical design storm assumptions.

Condition assessment of selected pipeline segments found localized structural deficiencies requiring rehabilitation or replacement, particularly among older vitrified clay pipe segments, which comprise most of the system and of which approximately 65 percent are more than 50 years old.³⁸

To address both capacity and condition concerns, the Sewer Master Plan identifies a capital improvement program focused on targeted trunk sewer replacements, condition-based rehabilitation, and long-term flow monitoring, including approximately \$7.6 million in capacity improvement projects, \$9.0 million in condition improvement projects, and additional monitoring investments to improve wet-weather performance assessment and long-term system reliability.

The City of Fullerton noted that sewer enterprise revenues are flat while operating costs are increasing, reducing available funding for wastewater repairs, replacements, and capital improvements. The City also reported that several collection system deficiencies and condition issues identified in the 2024 Sewer Master Plan Update remain unresolved or in progress, and that some repairs will be addressed when sufficient funding is available. However, Fullerton indicated no known development delays due to sewer limitations and referred to the Sewer Master Plan regarding overall system needs and capacity. The city did not express any concerns or issues with the

³⁸ The 2024 Sewer Master Plan for the City of Fullerton confirms 11 of 17 CIP projects have been completed between 2009 and 2023.

adequacy of wastewater services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of La Habra owns and operates the local wastewater collection system serving the City's service area and conveys all wastewater to the Orange County Sanitation District for regional treatment and disposal, according to the 2019 City of La Habra Sewer Management Plan ("SMP").

The system consists of 125 miles of gravity sewer mains and associated appurtenances and is maintained by the City's Public Works Department, Water/Sewer Division. The SMP indicates that La Habra does not operate wastewater treatment facilities and relies on OCSD for downstream treatment capacity.

System performance and capacity are managed through a program of routine cleaning, inspection, and flow monitoring rather than through systemwide hydraulic modeling. The SMP further indicates that La Habra has established a CIP to address projected hydraulic deficiencies which is included in the 2005 SMP Update.³⁹ The City of La Habra conducts periodic CCTV inspections and maintains a geographic information system ("GIS") inventory to track system condition and prioritize rehabilitation. The SMP identifies the need for continued preventive maintenance, targeted rehabilitation of deteriorated sewer segments, and control of FOG to reduce blockages and sanitary sewer overflows.

The City of La Habra maintains emergency response procedures, vacuum truck resources, and trained staff to respond to overflows and system failures and emphasizes long-term rehabilitation planning and replacement of aging sewer infrastructure as part of its ongoing capital and maintenance programs.

To address both capacity and condition concerns, the SMP Update identifies a capital improvement program focused on targeted capacity-driven trunk sewer replacements, and condition-based pipeline rehabilitation. Projects are prioritized based on field-

³⁹ RSG was unable to obtain a copy of these files as part of this service review.

verified capacity deficiencies, CCTV-informed structural condition ratings, and identified system “hot spots,” and are phased to align with available funding and implementation capacity, with total planned sewer replacement investments estimated at approximately \$21.1 million.

The City of La Habra did not express any concerns or issues with adequacy of wastewater services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Placentia owns and operates majority of the local wastewater collection system serving the City’s service area and conveys all wastewater to the Orange County Sanitation District for regional treatment and disposal, according to the City of Placentia’s 2018 Sewer Master Plan. The Yorba Linda Water District separately provides wastewater collection to roughly 15 percent of the City of Placentia via 10 miles of gravity sewer mains. However, Yorba Linda Water District’s system connects to the City of Placentia collection system at various points prior to outfalls to the Orange County Sanitation District.⁴⁰

The City of Placentia’s collection system consists of approximately 84 miles of gravity sewer mains, eleven inverted siphons, and does not include City-owned treatment facilities, lift stations, or force mains.

Hydraulic modeling conducted for the Sewer Master Plan indicates that the majority of the system operates within acceptable capacity thresholds under dry-weather conditions; however, localized capacity deficiencies were identified under peak wet-weather scenarios in select trunk sewer segments.⁴¹ Condition assessment identified

⁴⁰ Based on the Placentia’s 2018 Sewer Master Plan Orange County Sanitation District owns and operates approximately 2.9 miles of gravity sewer within a 0.11 square mile area completely within the City of Placentia boundary. However, wastewater flows here have no connection to the City’s collection system.

⁴¹ The City of Placentia’s 2018 Sewer Master Plan does not provide a single, clearly labeled systemwide average dry-weather flow figure. Instead, the report provides a table identifying flow projections used for modeling scenarios.

aging vitrified clay pipe and areas susceptible to infiltration and inflow as priorities for rehabilitation.

The Sewer Master Plan identifies a capital improvement program focused on targeted trunk sewer upsizing, condition-based pipeline rehabilitation, and continued flow monitoring to address both existing and projected deficiencies and to maintain long-term system reliability and regulatory compliance.

The City of Placentia did not express any concerns or issues with adequacy of wastewater services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

- Yorba Linda Water District owns and operates a wastewater collection system serving approximately 24,700 service connections and conveys all wastewater to the Orange County Sanitation District for regional treatment and disposal, based on the Yorba Linda Water District's 2022 Wastewater Master Plan Executive Summary.

The system consists of approximately 270 miles of sewer pipeline and 6,240 manholes, divided between a West Area (194 miles) and an East Area (76 miles), and includes one lift station in the East Area; pipe materials are primarily vitrified clay with smaller amounts of PVC, ductile iron, cast iron, and ABS.

Existing average dry weather flow within the District totals approximately 5.99 million gallons per day ("mgd"), with buildout flow estimated at 6.31 mgd. Hydraulic modeling indicates the system has localized capacity constraints, with additional areas expected to approach capacity as development occurs. Several pipeline segments are also nearing capacity and should be monitored.

To address these issues, the 2022 Wastewater Master Plan Executive Summary identifies three priority capital improvement projects (Kellogg Drive, Yorba Linda Town Center, and Buena Vista areas) to correct capacity constraints and provide for planned development, with individual project costs ranging from approximately \$1.6 million to \$2.9 million (2022 dollars). The 2022 Wastewater Master Plan Executive Summary also

documents ongoing CCTV inspection and condition assessment efforts, as well as integration with the District's Asset Management Plan to support long-term rehabilitation and system reliability.

The Yorba Linda Water District did not express any concerns or issues with adequacy of wastewater services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

Based on the assessments and findings above, RSG determines that the agencies in the North Region currently have the capacity to continue providing wastewater collection services to existing residents at present levels of service. Sewer Master Plans and Sewer System Management Plans prepared for the Cities of Brea, Fullerton, La Habra, and Placentia and the Yorba Linda Water District indicate that their collection systems generally operate within acceptable capacity thresholds under dry-weather conditions and that available conveyance to the Orange County Sanitation District is sufficient to meet current and projected demands.

However, these findings also indicate that much of the region's wastewater infrastructure consists of aging gravity pipelines, many of which were constructed more than 40 to 70 years ago and are approaching - or have exceeded - their useful lifespan. All agencies have identified localized hydraulic deficiencies under peak wet-weather conditions, structurally deficient pipeline segments requiring rehabilitation or replacement, and ongoing risks associated with infiltration and inflow. Each agency has established capital improvement programs focused on targeted trunk sewer upgrades, condition-based pipeline rehabilitation, lift station and siphon improvements (where applicable), and continued flow monitoring to address both existing and projected deficiencies and to maintain regulatory compliance.

While existing systems are currently adequate, deferral of planned rehabilitation or reduction in sewer maintenance revenues may compromise long-term system reliability and increase the risk of capacity constraints and sanitary sewer overflows. These risks are particularly pronounced for agencies with large inventories of older vitrified clay pipe

and documented required infrastructure upgrades, including the cities of Fullerton and Brea, and the Yorba Linda Water District.

STORMWATER AND SOLID WASTE

All cities in the North Region provide storm water drainage services in-house through their respective Public Works Departments as detailed on their respective websites. All cities in the North Region have a National Pollutant Discharge Elimination System (“NPDES”) Program to prevent pollution from being discharged into the environment. Stormwater collected for each city in the North Region is disposed of in the nearest body of water available to each agency. For instance, and as explained on their websites, the City of Fullerton and La Habra’s stormwater drainage systems connect to the Coyote Creek Watershed which is a tributary of the San Gabriel River. The San Gabriel River empties into the Pacific Ocean in Seal Beach.

Solid waste collection, disposal, and recycling services within the North Region are generally provided through franchise agreements with private haulers supported by regional landfill and recycling facilities. This arrangement allows the cities to meet state waste diversion requirements while relying on existing regional infrastructure rather than operating independent disposal facilities. All cities in the North Region, except for La Habra, contract with Republic Services formerly known as “MG Disposal”. La Habra currently contracts with CR&R Incorporated.

None of the cities identified service deficiencies or concerns related to stormwater or solid waste service delivery or related facilities. RSG separately did not identify any notable concerns during the timing of this report. Therefore, RSG determines that the cities’ stormwater and solid waste services in the North Region are adequate to meet existing and future community needs at the present level of service.

UTILITIES (ELECTRIC, LIGHTING, AND OTHER UTILITIES)

Lighting services are provided to each city by the Southern California Edison (“SCE”). Based on information available on the cities’ website, most cities in North Region own their

street lighting infrastructure but rely on SCE for the maintenance and operation, apart from the City of Brea who oversees the maintenance of their street lighting. The agencies did not report any issues with lighting services. Electricity and gas services are generally provided to North Region agencies by SCE and Southern California Gas (“SoCal Gas”). The agencies did not report any issues with these utility providers.

None of the cities identified service deficiencies or concerns related to utility (street lighting, gas and electric) service delivery or related facilities. RSG separately did not identify any notable concerns during the timing of this report. Therefore, RSG determines that the cities’ utility services in the North Region are adequate to meet existing and future community needs at the present level of service.

STREET MAINTENANCE

Street and road maintenance services are provided by each city’s Public Works Department. In the City of Placentia, street and road maintenance and repair activities are performed by City Public Works crews, while street sweeping services are provided under contract by the Sweeping Corporation of America (SCA).

The cities fund street and road maintenance in a variety of ways. They use funding from their General Funds and Enterprise Funds, along with money from impact fees and grants. Cities in California receive a share of the statewide gas tax, which can be used for research, planning, construction, improvement, maintenance, and operation of public streets. For many cities, the gas tax is one of the single largest funding sources in their CIP.

Orange County also has a countywide sales tax that can be used for transportation improvements. Measure M2 (otherwise known as “OC Go”) is a voter-approved countywide half-cent transportation sales tax that can be used to expand Metrolink (the southern California regional rail system), improve street conditions, relieve congestion, and reduce pollution, along with other transportation-related goals. The Measure was originally approved by the voters in 1991 for thirty years and was extended in 2011 through 2041. Measure M2 is often a major source of funding for cities’ capital improvement programs.



Table 12 shows the maintained miles of urbanized roads for each of the cities, along with their respective budgeted gas tax expenditures.

Table 12: Maintained Road Miles, Vehicle Miles Traveled, & Gas Taxes per City

North Region			
City	<i>Urbanized Roads</i>		<i>City Budgeted</i>
	Maintained Miles	Daily Vehicle Miles Traveled	FY 25-26 Gas Tax Expenditures¹
Brea	116	461	\$1,356,146
Fullerton	296	1,776	\$4,284,367
La Habra	108	422	\$3,340,937
Placentia	102	395	\$3,032,118
Yorba Linda	207	645	\$5,466,552

¹ Gas Tax expenditures include those included under the Road Maintenance and Rehabilitation Account (SB 1, 2017) funds

Source: Caltrans 2023 Public Road Data Report, City Budgets FY 25-26

Table 13 provides an overview of the roadway infrastructure within the North Region cities using available data on centerline miles and pavement conditions pulled from each cities' most recent Pavement Management Plans. Pavement conditions are summarized using Pavement Condition Index ("PCI") scores, a commonly used measure of roadway condition scale of 0 to 100, where higher scores reflect better pavement conditions. The table below, includes PCI data for local streets, as reported by each city, and arterial and collector roadway PCI information from the Master Plan of Arterial Highways ("MPAH") inspections. These indicators provide a high-level snapshot of roadway conditions and help inform the evaluation of infrastructure maintenance needs.

Table 13: Roadway Infrastructure in North Region

City of Brea	
Centerline Miles	127.3
Arterial and Collector (MPAH) PCI	78.7
Local Streets PCI	82.9

City of Fullerton	
Centerline Miles	297.3
Arterial and Collector (MPAH) PCI	75.6
Local Streets PCI	65.6
City of La Habra	
Centerline Miles	~99
Arterial and Collector (MPAH) PCI	Not available
Local Streets PCI	Not available
City of Placentia	
Centerline Miles	133.9
Arterial and Collector (MPAH) PCI	84.5
Local Streets PCI	77.0
City of Yorba Linda	
Centerline Miles	214.4
Arterial and Collector (MPAH) PCI	73.0
Local Streets PCI	79.0

Following are individual findings about each agency's ability to provide street maintenance services⁴²:

- According to the City of Brea's 2025-2032 Pavement Management Plan ("PMP"), Brea maintains approximately 127.3 centerline miles of streets with both major pavement arterial/collector ("MPAH") and local street systems rated in the "good" range based on weighted Pavement Condition Index ("PCI") values. The MPAH network has a weighted PCI of approximately 78.7, and the local street network has a weighted PCI of approximately 82.9, indicating generally serviceable pavement conditions across the system.

Despite the current favorable condition ratings, the PMP identifies a significant and growing deferred maintenance backlog. Under projected funding levels, deferred pavement maintenance is expected to increase from approximately \$22.4 million to about \$51.8 million by FY 2031–32. Maintaining existing conditions will require approximately \$2.8 million annually for arterial/collector streets and approximately \$3.7 million annually for local streets over the seven-year planning horizon.

⁴² RSG relied on the findings documented in each agencies' respective pavement management plan or similar plans where available.

Funding increases beyond current levels would be required to improve overall network condition and materially reduce the deferred maintenance backlog. Without sustained or enhanced investment, the City risks gradual deterioration of pavement conditions and continued growth in unfunded rehabilitation needs, potentially placing pressure on future capital improvement budgets.

The City of Brea did not express any concerns or issues with adequacy of road maintenance services. RSG separately did not identify any notable concerns during the timing of this report. However, RSG notes that Brea will need to continue following the recommendations outlined in the City's PMP to ensure long-term sustainability of existing road conditions and its ability to fund necessary improvements as planned.

- The City of Fullerton maintains approximately 297.3 centerline miles of streets with an estimated replacement value of about \$706.5 million, according to Fullerton's 2024-2031 PMP. The PMP further indicates that while portions of the roadway network remain in "good" condition, overall system performance reflects growing maintenance and funding challenges. The arterial and collector ("MPAH") network has a weighted average PCI of approximately 75.6, which falls within the "good" range, while the local street network has a weighted average PCI of approximately 65.6, placing it in the "fair" range.⁴³ Nearly half of the local street system qualifies for rehabilitation or reconstruction, signaling widespread structural deterioration rather than surface-level distress.

The PMP identifies a substantial and increasing backlog of deferred maintenance. Under current funding levels, deferred pavement maintenance is projected to grow to approximately \$141 million by FY 2030–31. To maintain current pavement conditions, the PMP estimates annual funding needs of approximately \$2.8 million for arterials and \$6.8 million for local streets. The City's pavement network replacement value exceeds \$700 million, underscoring the scale of the asset at risk if adequate reinvestment does not occur.

⁴³ Fullerton's PMP suggests the City's *overall* network (MPAH and local streets) weighted PCI is 69.3, which has improved since the 2022 PMP report was conducted.

The City of Fullerton did not express any concerns or issues with adequacy of road maintenance services or facilities. RSG separately did not identify any notable concerns during the timing of this report. However, RSG notes that Fullerton will need to continue following the recommendations outlined in the City's PMP to ensure long-term sustainability of existing road conditions and its ability to fund necessary improvements as planned.

- The City of La Habra maintains approximately 115.6 centerline miles of streets with both major pavement arterial/collector ("MPAH") and local street systems rated in the "good" range based on weighted Pavement Condition Index ("PCI") values. The MPAH network has a weighted PCI of approximately 82.6, and the local street network has a weighted PCI of approximately 77.2, indicating generally serviceable pavement conditions across the system.

The PMP confirms the City's current annual funding (FY 2025-26) through FY 2031-32 will continue to generate a positive reduction in the amount of deferred maintenance on the network, going from \$8.4 million in current fiscal year to \$7.2 million by FY 2032. The PMP further confirms La Habra has approximately \$3.5 million of current funding annually to support maintaining existing PCI levels.

The City of La Habra did not express any concerns or issues with adequacy of road maintenance services or facilities. RSG separately did not identify any notable concerns during the timing of this report. Although La Habra did not identify any concerns regarding the adequacy of roadway maintenance services and RSG did not observe any notable deficiencies during the preparation of this report, the City of La Habra does not currently maintain a formal PMP.

- The City of Placentia maintains approximately 133.9 centerline miles of streets with an estimated replacement value of about \$282.1 million, according to the City's 2024-2031 PMP. The PMP also suggests the City's pavement network is generally in good condition, with a citywide weighted PCI of approximately 79.7, reflecting the City's

consistent use of preventive maintenance strategies over the past decade. Arterial and collector streets (“MPAH”) exhibit a weighted PCI of about 84.5, while local residential streets have a weighted PCI of about 77.0. Despite these favorable ratings, a notable portion of both networks will be needed over the next seven years for slurry seal or rehabilitation treatments. This suggests that portions of the system may be beginning to experience structural deterioration rather than purely surface distress.

Under the City’s current and forecasted funding program, the PMP projects that deferred maintenance on both the arterial and local networks can be reduced to \$0 by approximately FY 2026–27, provided that the planned maintenance and rehabilitation program is fully implemented. The PMP outlines a significant multi-year CIP for streets, with recommended average annual funding levels of approximately \$2.1 million per year for arterials and \$2.8 million per year for local streets to maintain current system performance. These funding levels are necessary to sustain PCI values in the “good” range and prevent future growth in backlog. Although the PMP concludes that the proposed budget is sufficient to stabilize pavement conditions, it also implies that reductions in funding would likely result in renewed backlog growth and higher long-term costs, creating a potential affordability challenge if revenues decline or competing capital needs emerge.

The City of Placentia did not express any concerns or issues with adequacy of road maintenance services or facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Yorba Linda maintains approximately 214.4 centerline miles of streets with an estimated replacement value of \$449.1 million, according to its 2024 Pavement Management Plan (“PMP”). The overall weighted PCI for the network is 78, placing the system in the “Good” category. Arterial streets (“MPAH”) have an average PCI of 73.0 (Good), and local streets have an average PCI of 79.0 (Good). While the system is performing well relative to regional and statewide averages, approximately 44.5

percent of the network is in Fair, Poor, or Very Poor condition⁴⁴, indicating that a substantial portion of the system is entering a stage where deterioration accelerates and rehabilitation costs increase.

The PMP identifies deferred maintenance as a significant long-term challenge. Under the City's current funding level (approximately \$5.0 million per year), the network PCI is projected to decline from 78.0 to 76.0 over the next eight years, while deferred maintenance is projected to grow from approximately \$39.4 million to \$56.0 million by FY 2031–32. Even under higher funding scenarios⁴⁵ designed to maintain or slightly improve PCI, deferred maintenance remains substantial, ranging from between \$39.4 million to \$52.0 million, indicating that full elimination of backlog would require funding well above current levels.

Funding for the pavement program relies primarily on the City's CIP allocations and state and regional transportation revenues, including Measure M2 and SB-1 ("RMRA") funds. The PMP notes that Yorba Linda currently qualifies for a 10 percent reduction in local match requirements under OCTA's Measure M2 program due to its high network PCI, but continued eligibility depends on sustained investment and compliance with pavement management reporting requirements.

The City of Yorba Linda did not express any concerns or issues with adequacy of road maintenance services or facilities. RSG separately did not identify any notable concerns during the timing of this report outside of the identified deferred maintenance backlogs and significant capital investment required to raise PCI ratings.

Based on the assessment and findings above, RSG determines the agencies in the North Region have the capacity to continue to provide street maintenance services to existing residents at present levels of service. Pavement Management Plans ("PMPs") prepared by the cities of Brea, Fullerton, Placentia, and Yorba Linda suggest their roadway networks

⁴⁴ RSG combined the cited percentages in PMP for the networks classified as Fair, Poor, and/or Very Poor.

⁴⁵ Yorba Linda's PMP provides various budget scenarios with varying funding levels and maintenance strategies to identify "what if" scenarios.

are generally in “good” condition and that each agency has established planning frameworks for prioritizing and funding maintenance and rehabilitation.

However, the PMPs also identify substantial deferred maintenance and growing rehabilitation for most of the cities in North Region that will require sustained and, in some cases, increased investment to prevent long-term system decline. Continued reliance on preventative maintenance, disciplined implementation of capital improvement plans, and preservation of dedicated revenue sources will be crucial to sustaining current service levels. Any potential reduction in revenues dedicated to street maintenance or deferral of programmed improvements may materially impair the agencies’ ability to fund necessary roadway improvements.

These fiscal and operational risks are most pronounced for the cities of Fullerton and Yorba Linda who are expected to have significant increases in deferred maintenance backlogs under the identified forecasts in their respective PMPs. Additionally, for these two agencies, long-term capital needs appear to exceed their existing budget levels dedicated to roadway maintenance. Therefore, these agencies may face a higher risk of declining pavement conditions and increased future capital obligations.

PARKS, RECREATION, AND OPEN SPACE

Parks and Recreation services in the North Region are primarily provided and maintained by individual city parks and recreation departments. These services include the operation and maintenance of neighborhood and community parks, recreational facilities, trails, and open space areas intended to support community wellness, outdoor recreation, and environmental preservation. In addition to city-operated facilities, limited regional recreational resources and open space areas within or adjacent to the North Region are managed by the County of Orange through OC Parks. Table 14 provides an inventory of public parks and regional parks maintained by agencies serving the North Region. Table 15 provides an inventory list of the miles of trails, and acreage of parklands and open space for each city in the North Region.

Table 14: Public Parks and Regional Parks in the North Region

North Region	
Agency	Public Parks
Brea	19
Fullerton	53
La Habra	24
Placentia	16
Yorba Linda	30

County or Federal	Regional Parks
Brea	Carbon Canyon Regional Park, Ted Craig Regional Park, Tri-City Park
Fullerton	Craig Regional Park, Fullerton Arboretum, Ralph B.Clark Regional Park, Tri-City Regional Park
La Habra	N/A
Placentia	Tri-City Park
Yorba Linda	Yorba Regional Park, Carbon Canyon Regional Park, Featherly Regional Park, Chino Hills State Park

Source: City websites & General Plans

Table 15: Parkland, Open Space, and Trail Resources

City of Brea	
Total Parkland Acreage	3,772
Total Open Space Acreage	412
Total Miles of Trails	6
City of Fullerton	
Total Parkland Acreage	Not applicable
Total Open Space Acreage	996
Total Miles of Trails	28
City of La Habra	
Total Parkland Acreage	126
Total Open Space Acreage	139
Total Miles of Trails	Not applicable
City of Placentia	
Total Parkland Acreage	61
Total Open Space Acreage	224
Total Miles of Trails	Not applicable

City of Yorba Linda	
Total Parkland Acreage	92
Total Open Space Acreage	147
Total Miles of Trails	100

Following are individual findings about each agency's ability to provide park and recreation services⁴⁶:

- In the City of Brea, the Community Services Department oversees park activities. The Parks, Recreation, and Human Services Commission serves in an advisory role, representing public interests and concerns related to park and recreation services. The Commission evaluates community needs and provides recommendations on programs and services to the City Council, acting as a liaison between residents and City officials.

The City of Brea's website lists a total of 12 public parks that encompass various recreational amenities such as soccer fields, picnic areas, basketball and tennis courts, public restrooms, barbeque areas, and more. Parkland acreage ranges in size from the 0.5-acre Woodcrest Park to the 20-acre Brea Sports Park. Brea also has two golf courses: the Birch Hills Golf Course and Brea Creek Municipal Golf Course.

Additionally, two regional parks are situated in the City of Brea, the Carbon Canyon Regional park and the Ted Craig Regional Park, each consisting of approximately 130 acres. The Orange County Department of Parks maintains both regional parks. The City of Brea also provides a hiking trail spanning 1.9 miles known as the Olinda Oil Museum and Trail. According to Brea's 2019 Parks, Recreation and Human Services Facility Needs Assessment, the City of Brea has recreational trails that cover about 6 miles of terrain.

In addition to the various parklands and related amenities, the City of Brea offers a variety of recreation programming that includes dance, sports, arts and crafts, music

⁴⁶ RSG relied on information readily available via agency websites, General Plans, and feedback from interviews where appropriate.

enrichment and more. Recreational programs are offered at the Brea Community Center located at 695 E. Madison Way in Brea.

In addition to the park and recreation services detailed above, the City of Brea provides 412 acres of open space. RSG was unable to identify any park and recreation standards in the City of Brea's General Plan.

The City of Brea did not express any concerns or issues with adequacy of parks and recreation services or related facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Fullerton's Parks and Recreation Department oversees park and recreation activities. The Parks and Recreation Commission serves in an advisory role, representing public interests and concerns related to public recreation services. The Commission evaluates community needs and provides recommendations on programs and services to the City Council, acting as a liaison between residents and City officials.

The City of Fullerton website identifies a total of 53 public parks that encompass various recreational amenities such as soccer fields, picnic areas, basketball and tennis courts, public restrooms, barbeque areas, and more. Parkland acreage ranges in size from 0.6 to 242 acres, with the Plaza Park reflecting the smallest public park and the Brea Dam Recreation Area reflecting the largest. Four regional parks were identified within the City of Fullerton.

According to the City of Fullerton's list of trails on its website, Fullerton maintains approximately 28 miles of recreation trails that are spread throughout the city. Fullerton's trail heads range in size from 0.64 miles to 2.79 miles, with Nora Kuttner Trail reflecting smallest trailhead and Juanita Cooke Greenbelt & Trail the largest.

In addition to the various parklands and related amenities, the City of Fullerton offers a variety of recreation programming that includes youth and senior programs,

recreation rentals, health & fitness classes, and more. Fullerton's Community Center Recreation Division is located at 340 W. Commonwealth Avenue.

In addition to park and recreation services, the City of Fullerton also offers 996 acres of open space. According to Fullerton's 2012 General Plan, the City strives to provide 4 acres of parklands for every 1,000 residents.

The City of Fullerton did not express any concerns or issues with adequacy of parks and recreation services or related facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of La Habra's Community Services Department oversees recreation activities, whereas the Public Works Department oversees park maintenance. The Community Services Commission serves in an advisory role, representing public interests and concerns related to public recreation services. The Commission evaluates community needs and provides recommendations on programs and services to the City Council, acting as a liaison between residents and City officials.

The City of La Habra has a wide range of parks including mini parks, neighborhood parks, community parks, and a golf course. At certain park locations, the City of La Habra also offers natural and paved walking bike paths. According to La Habra's parks inventory list, the City provides a total of 23 public parks that encompass various recreational amenities such as soccer fields, picnic areas, basketball and tennis courts, public restrooms, barbeque areas, and more. Individual parkland acreage ranges in size from 0.2 to 27 acres, with the Corona Park reflecting the smallest public park and the Vista del Valle Park reflecting the largest. No regional parks were identified within the City of La Habra.

In addition to the various parklands and related amenities, the City of La Habra offers a variety of recreation programming that includes youth sports programs, special events, summer day camps, aquatic programs, and more. La Habra's Community Center Recreation Division is located at 101 W. La Habra Blvd.

In addition to park and recreation services, the City of La Habra also offers 139 acres of open space. According to La Habra's 2014 General Plan⁴⁷, the City strives to provide a ratio of parks, recreational facilities, and open space of 2.5 acres for every 1,000 residents.

The City of La Habra did not express any concerns or issues with adequacy of parks and recreation services or related facilities. RSG separately did not identify any notable concerns during the timing of this report.

- In the City of Placentia, park and recreation services are administered by the Community Services Department, which oversees the planning, operation, and maintenance of parks, recreational facilities, and community programs. The Department is responsible for providing recreational programming, special events, facility rentals, and community services that support resident wellness, community engagement, and quality-of-life opportunities throughout the City.

The Park Arts and Recreation Commission ("PARC") separately serves in an advisory role to the City Council and City Administrator, representing public interests and concerns related to park and recreation services. PARC also assists in the development and adoption of park-related plans for Placentia's parks and recreational activities.

The City of Placentia's 2018 General Plan and Park and Facilities Map identify 19 public parks and related complexes offering recreational amenities such as athletic fields, picnic areas, courts, public restrooms, and barbeque areas. According to the City of Placentia's website, these facilities also accommodate meetings, receptions, birthday and graduation parties, and other special events.

Placentia's park system is divided between "Parkettes", "Neighborhood Parks" and "Community Parks" and "Subregional Parks". Park sizes range from approximately 0.4 acres (Jaycee Parkette) to 11 acres (Kraemer Park). Additionally, the City of Placentia's

⁴⁷ La Habra's General Plan was last amended January 2024.

General Plan identifies one regional park, the Tri-City Regional Park which consists of approximately 40 acres. The Orange County Department of Parks is responsible for the maintenance and operation of Tri-City Regional Park. Overall, the City of Placentia offers over 220 acres of parklands to residents.

Placentia's 2018 General Plan further confirms the City also maintains a network of Class I, II, and III bikeways that provide access to schools, parks, and open space areas while supporting recreational and active transportation opportunities. While no equestrian trails currently exist within the City, residents have access to nearby equestrian facilities in surrounding jurisdictions. In terms of trails, the City confirmed with RSG that their trails primarily consist of short internal park trails and connections to regional facilities such as those at the Tri-City Regional Park. The City of Placentia further confirmed they are advancing the Atwood Multipurpose Trail Project, a planned 20-foot-wide walking and biking corridor intended to enhance connectivity, safety, and active transportation in the Atwood area. The City also received a \$280,000 OCTA bicycle grant and expects construction to begin later this year.

In addition to the various parklands and related amenities, the City of Placentia operates a variety of recreational and community facilities that support youth, senior, educational, and recreational programming, as well as community events and facility rentals serving residents, nonprofit organizations, and public agencies. The 2018 General Plan for Placentia confirms there are ten recreational facilities and community buildings within the city.

According to the 2018 General Plan, the City of Placentia's Open Space and Recreation Plan establish a parkland standard of four acres per 1,000 residents to ensure adequate recreational opportunities. The City currently exceeds this standard, maintaining over 224 acres of parkland, including neighborhood, community, and subregional parks, as well as open space associated with school facilities.

The City of Placentia did not express any concerns or issues with adequacy of parks and recreation services or related facilities. RSG separately did not identify any notable concerns during the timing of this report.

- The City of Yorba Linda provides parks and recreation services through its Parks and Recreation Department, which includes Parks, Facilities, and Recreation divisions responsible for park and trail maintenance, public building operations, recreational programming, and community events serving residents and visitors.

According to the City of Yorba Linda Park and Facilities Map, the City provide 30 public parks and fields offering a variety of amenities, including athletic fields, picnic areas, sports courts, barbeque facilities, public restrooms, and open space areas that support both active and passive recreation. Based on the City of Placentia's 2016 General Plan, the City's park system is divided between "Mini/Greenbelt" parks, "Neighborhood" parks, and "Community" parks. Parks range in size from 0.5 to 17 acres, with the Las Brisas Park reflecting the smallest public park and Eastside Community Park reflecting the largest.

In addition to park amenities, recreational facilities accommodate community gatherings and private events such as meetings, receptions, and celebrations, while City programming includes youth and adult sports, aquatics, classes, senior and teen programs, summer camps, special events, and volunteer opportunities serving residents and surrounding communities.

Additionally, the 2018 General Plan identifies three regional parks located within City of Yorba Linda's planning area: Yorba Linda Regional Park, Carbon Canyon Regional Park, and Featherly Regional Park; the Chino Hills State Park is also accessible from the City of Yorba Linda but is not within the planning area. These regional parks provide significant recreational and open space resources to residents and the surrounding region. Collectively, these regional resources contribute approximately 14,770 acres of parkland serving the broader Yorba Linda area.

In terms of trails and open space, the 2016 General Plan confirms Yorba Linda provides 147 acres of open space and maintains an extensive trail system consisting of approximately 30 multi-use paved and natural surface trails totaling over 100 miles in length. The trail network supports recreational and active transportation opportunities and includes regional connections such as the Santa Ana River Trail, as well as linkages to nearby recreational resources including Chino Hills State Park, consistent with the City's Master Plan of Trails.

The City of Yorba Linda's 2016 General Plan establishes parkland dedication requirements consistent with the Quimby Act, requiring three acres of parkland per 1,000 residents or payment of in-lieu fees. The General Plan references the City's 2014 Parks and Recreation Master Plan ("PRMP"), which recommends a broader combined standard of 15 acres per 1,000 residents across mini, local, neighborhood, and regional park categories. While the PRMP indicates the City meets the overall combined standard, largely through access to regional parks, joint-use school facilities, and private recreational amenities, it identifies an approximate 101-acre shortfall in local parkland needed to satisfy neighborhood and community park standards.

The City of Yorba Linda did not express any concerns or issues with adequacy of parks and recreation services or related facilities. RSG separately did not identify any notable concerns during the timing of this report.

Based on the assessment and findings above, RSG determined the agencies in the North Region have the capacity to continue to provide quality park and recreational services to current residents at current levels of service. However, the City of Yorba Linda should continue to explore opportunities to expand its local parklands to meet its neighborhood and community park standards given the documented shortfall in their 2014 Parks and Recreation Master Plan.

LIBRARY SERVICES

Library services in the North Region are provided through a combination of municipal and county-operated systems. The Cities of La Habra and Brea receive library services through



the County of Orange Public Library system, which operates branch facilities serving residents within these jurisdictions. The City of Placentia receives library services through the Placentia Library District. The City of Fullerton operates and maintains its own municipal library system, providing services directly to residents through City-managed facilities. Table 16 provides an inventory of the number of library facilities serving each community in the North Region.

Table 16: Library Service Providers in the North Region

City	Library Service Provider	Number of Library Branches
City of Brea	County of Orange	1
City of Fullerton	City of Fullerton	2
City of La Habra	County of Orange	1
City of Placentia	Placentia Library District	1
City of Yorba Linda	City of Yorba Linda	1

Following are individual agency findings:

- Library services for the Cities of Brea and La Habra are provided through the Orange County Public Libraries (“OCPL”) system. OCPL operates a network of 29 community branch libraries that serve residents throughout Orange County. Through this partnership, OCPL operates branch libraries within Brea and La Habra and provides residents with access to the broader countywide library network. The Brea library is located at 1 Civic Center Circle Plaza, and the La Habra branch library is located at 221 E. La Habra Blvd. La Habra’s city staff informed RSG that the library is temporarily closed for renovations. The City of La Habra owns the library building, while all the staff members are employed by the county. OCPL offers a range of services, including access to physical and digital collections, research and educational resources, computer and internet access, literacy programs, and community programming for youth, teens, and adults. In addition, the OCPL system provides access to materials across its branch network, allowing residents to borrow and return items throughout the county system.

- The City of Fullerton operates and maintains its own municipal library system, the Fullerton Public Library, which provides services directly to residents through City-managed facilities. The library's mission is to serve the diverse needs of the community by fostering learning, providing access to information and resources, and promoting creative thinking and community engagement. Its vision emphasizes providing free and equitable access to information and ideas while supporting lifelong learning and literacy for residents of all ages. Fullerton Public Library offers a range of services, including access to physical collections and digital resources such as e-books and audiobooks, as well as educational programs and community events for children, teens, and adults. Additional services include technology assistance, research support, and literacy-focused programming that support educational and cultural enrichment within the community.
- The City of Placentia receives library services through the Placentia Library District, an independent special district responsible for operating and maintaining library facilities serving the community. The District's mission is to inspire learning, foster community connections, and provide equitable access to information and resources for residents. Library services include access to physical and digital collections, educational programming, literacy initiatives, and community events designed to serve residents of all ages. The District has expanded services and programs to better serve the community, including the development of an outdoor learning space, operation of a bookmobile, and other community-focused initiatives aimed at improving accessibility, outreach, and educational opportunities for residents. Additionally, the District continues to invest in services and technology to improve accessibility and customer service for patrons. The District offers a mobile application that provides convenient access to the library catalog, account services, and other library resources, enhancing public access and service delivery. The Placentia Library District eliminated overdue fines in 2017 in order to reduce barriers to accessing library resources and services, particularly for lower-income residents. This policy aligns with the District's goal of promoting equitable access to information and supporting literacy and student

success while encouraging broader community participation in library programs and services.

- The City of Yorba Linda provides library services through the Yorba Linda Public Library, which is owned and operated by the City. The library's mission emphasizes inspiration, connection, and community building by providing residents with access to resources, services, and programs that support lifelong learning. The library offers a range of services including access to physical and digital collections, technology resources, and educational programs for children, teens, and adults. In addition, the library provides community programming and learning opportunities designed to support literacy, encourage curiosity, and create an inviting space for residents of all ages.

Based on the assessment and findings above, RSG determines that the agencies in the North Region have the capacity to continue providing library services to current residents at current service levels. The existing library systems and facilities provide residents with access to a range of resources, programs, and community services that support literacy, lifelong learning, and community engagement across the North Region.

ANIMAL CONTROL

La Habra is the only city in the North Region that provides animal control services. The remaining four cities – Brea, Fullerton, Placentia, and Yorba Linda – receive animal control services by Orange County Animal Care.

According to the Orange County Animal Care's website, animal control services provided include the following:

- Shelter operations and adoption services
- Animal cruelty and neglect investigations
- Veterinary care
- Enforcement of local, state, federal laws (i.e., leashing)

- 24/7 field coverage

Based on interviews with city representatives, all North Region cities reported that they have sufficient funding in place to either contract for animal control services or provide the services directly at current levels. No agencies identified service deficiencies or concerns related to animal control service delivery. Based on the information available, animal control services in the North Region are adequate to meet existing community needs at the present level of service.

CODE ENFORCEMENT

Code enforcement services in the North Region are provided on a jurisdictional basis. Each city administers code enforcement within their respective boundaries, while Orange County provides code enforcement within the unincorporated areas of the North Region.

Based on the interviews with each agency, RSG determines that code enforcement services are sufficient to meet existing demands and that each agency has the adequate capacity and related facilities to continue to provide these services at current levels without disruption. Further, none of the agencies identified deficiencies, service gaps, or concerns related to code enforcement service delivery.

VIII. FINANCIAL ABILITY TO PROVIDE SERVICES

Pursuant to Government Code Section 56430, MSRs make determinations on seven (7) required topics, including:

4. Financial ability of agencies to provide services.

The development of the Fiscal Indicators web-based program (formerly fiscal trends) began in 2008 to provide consistent and structured approach for assessing the fiscal health of Orange County's local agencies. Initially designed to facilitate comparisons of agency performance, the Fiscal Indicators program has evolved into a key analytical tool supporting OC LAFCO's preparation of the MSRs. By housing accurate and meaningful financial data, the program enables the Commission to evaluate the efficiency and effectiveness of municipal service delivery in Orange County. Over time, the platform has undergone functional and structured updates. While recently simplified, the Fiscal Indicators continue to serve as one of OC LAFCO's core living resources to promote transparency and guide decision-making.

The North Region MSR process included the gathering of data needed for the Fiscal Indicators and was discussed with the agencies of the North Region. More details on each of the indicators is provided in the next section of the report as well as the performance of each agency relative to the indicators.

OC LAFCO FISCAL INDICATORS

Fiscal indicators help measure and describe prospects for fiscal health. Indicators can flag trends that merit further evaluation and planning to avoid potential service reductions and declining reserves. The OC LAFCO Fiscal Indicators are based on the past State of California Auditor's indicators of cities' fiscal risk.⁴⁸ Multi-year trends in growth (or decline) of agency operating revenues and expenditures, and levels of reserves, are adapted and applied to agencies in Orange County. Agency annual financial reports provide the source data for three key indicators used by OC LAFCO and further described below:

⁴⁸ The California Auditor no longer publishes its fiscal risk analysis.

- **Annual Change in Revenues** compares revenue growth over multiple years to long-term inflation (historically about 2-3%). Low revenue growth below inflation indicates a potential long-term problem keeping pace with inflationary cost increases. Declining revenues can be a symptom of the pandemic and/or weakening economic conditions.

Indicator	Range (Average Annual Change)
Declining Revenues	Less than 0%
Low Growth	0%-3%
Moderate Growth	3%-6%
High Growth	> 6%

- **Annual Change in Expenditures** compares expenditure growth over multiple years to long-term inflation. Expenditure growth consistently above inflation and/or above revenue growth indicates a potential structural imbalance and potential future revenue shortfalls. Excessive expenditures could require reserve drawdowns and service reductions.

Indicator	Range (Average Annual Change)
Declining Expenditures	Less than 0%
Low Growth	0%-3%
Moderate Growth	3%-6%
High Growth	> 6%

This indicator generally favors low or declining expenditures. Revenue indicators, if favorable, can help confirm that declining expenditures are a benefit and not an adverse response to weak revenues.

- **Adequate Operating Reserves** are essential to manage cash flow during the year, handle contingencies and emergencies, and provide a "rainy day" account for future economic downturns. Operating reserves typically provide at least two months of operating funds (i.e., 16.7% of annual expenditures). If financial audits do not distinguish operating from capital and other reserves, other metrics include total unallocated fund balances or unrestricted net position. "Cash" does not always indicate unencumbered funds available for cash flow and contingencies. Additional reserves

above the 16.7% are usually typically available for emergencies or economic downturns, capital improvements, unfunded pensions, & other uses.

Reserve Indicator	Range
Low	Less than 17% of Expenditures
Moderate	17%-40% of Expenditures
High	> 40% of Expenditures

Depending on the type of agency and the timing of revenues and expenditures, higher minimum reserves may be required. Some agencies do not distinguish operating from capital and other reserves in their audit documents which may produce a “high” reserve indicator; further analysis is necessary to determine adequacy of capital reserves.

The Fiscal Indicators are intended to provide an initial review of annually reported financial data. Further in-depth analysis may be needed to better understand the cause of financial trends and potential remedies. For example, additional research could clarify whether declining expenditures positively reflect prudent management or are the result of weak revenues. Other factors that could influence indicators include the impacts of the pandemic; the economic climate; State and Federal regulatory changes; infrastructure needs and improvements; changes in service levels and contracts; unfunded OPEB and pension obligations; development, population growth, and increased need for services.

Fiscal Indicators for the North Region

The financial capacity of each agency in the North Region is generally adequate for providing services at the current levels, with minor concerns identified by the cities of Placentia and Fullerton as it relates to their ability to recruit and retain staff due to the competitive market salaries and benefits in the region. This MSR relies on data from the concurrent Fiscal Indicators project conducted by Berkson Associates on behalf of OC LAFCO, which assesses recent financial trends of the North Region agencies. Table 17 shows a summary of each agency's trends reported by the Fiscal Indicators. Three variables (revenues, expenditures, and reserves) are measured for each North Region agency over six fiscal years (FY 18-19 through FY 23-24).

Table 17: Summary of Fiscal Indicators Project and CA Auditor Rankings

North Region		Growth of Agency...			CA Auditor
Agency	Revenues	Expenditures	Reserves	Fiscal Condition	Rank
Brea	Moderate	Moderate	High		144
Fullerton	Moderate	Moderate	Moderate		15
La Habra	Moderate	Low	Moderate		94
Placentia	High	High	High		102
Yorba Linda	Moderate	Moderate	High		330
Placentia Library District	High	Moderate	High		#N/A
Yorba Linda Water District	High	High	High		#N/A

Source: Berkson & Associates Fiscal Indicators Report

Notes: N/A indicates data not available

REGIONAL FISCAL CONCERNS

Across the North Region, the reviewed agencies generally demonstrate stable financial performance, with most jurisdictions maintaining balanced operations and adequate fund reserves over the reporting period. Revenues and expenditures have grown at a moderate pace, and most cities have been able to sustain service levels while navigating periodic fluctuations tied to capital investments and economic conditions.

At the same time, several common fiscal pressures are emerging across the region. Public safety continues to represent the largest share of General Fund expenditures for most cities, and costs have trended upward in recent years. In particular, increases in contract costs for fire protection services and rising personnel-related expenses for police and fire services have contributed to expenditure growth in multiple jurisdictions. These trends are largely driven by regional labor agreements, pension obligations, and service delivery adjustments, and are expected to remain an important budget consideration moving forward.

In addition, agencies across the region are managing ongoing capital and infrastructure needs, particularly related to aging systems. While many jurisdictions have identified and planned for capital improvements, the scale of long-term investment needs — especially for water, wastewater, and roadway infrastructure — suggests that continued funding commitments will be important to maintain current service levels. In some cases, funding constraints may contribute to phased implementation or delayed maintenance activities,

particularly for roadway and broader infrastructure improvements, as agencies balance competing budget priorities.

Despite these considerations, the overall fiscal outlook remains stable. Most agencies continue to maintain sufficient reserves and demonstrate the capacity to meet existing service demands. Additionally, all agencies in the North Region are planning for such costs as reflected in their respective planning documents. However, long-term financial sustainability will depend on their continued efforts in managing rising service costs and maintaining consistent investment in infrastructure and capital assets. Therefore, continued monitoring of expenditure trends and proactive financial planning will help ensure that service levels can be sustained over time without placing undue pressure on local resources.

Assessment of Agency Financials

RSG assessed each agency's financial condition using the same general analytical approach applied by Richard Berkson with Berkson Associates. This evaluation is presented in the General Fund Cash Flow Detail tables included after each agency's financial overview below. The tables provide a six-year review of revenues, expenditures, and fund balances for FY 2018-19 through FY 2023-24 and include a "trend" column summarizing the compound average annual growth rate ("CAGR") over the reporting period. The compound trend represents the average annual rate of increases or decreases across the six-year period, helping illustrate longer-term financial direction while reducing the effect of year-to-year fluctuations.⁴⁹

These trends are used to identify notable changes in key financial metrics and, where applicable, are supplemented with agency-provided context explaining underlying causes.

⁴⁹ The "trend" column reflects the Compound Average Annual Growth Rate ("CAGR") for FY 2018-19 through FY 2023-24. CAGR represents the average annual rate of increase or decrease over a multi-year period, assuming growth occurs at a compounded rate, and is used to illustrate longer-term financial trends while minimizing the effect of short-term year-to-year fluctuations.

Together, this approach provides a consistent and transparent framework for evaluating fiscal stability and identifying potential areas of concern.

BREA

The City of Brea experienced moderate revenue and expenditure growth in its General Fund between FY 18-19 and FY 23-24. Public safety was the City's largest expenditure category in all six years accounting for 61.2% of all expenditures as of FY 23-24. Additionally, in FY 21-22 the City experienced a significant spike in Capital Outlay costs because of major facility and equipment replacement projects, including upgrades to the Curtis Theatre (new carpet and seating) and the replacement of in-car cameras for the Police Department, both funded through the City's Fixed Asset Replacement Fund and transferred into the General Fund. The City's revenues compared to expenditures remained in a surplus in five out of the six years reviewed, with FY 21-22 being in a deficit. Additionally, the City maintained a high fund balance in all six years reviewed. Therefore, RSG determines the City of Brea has sufficient financial capacity to meet service needs now and into the foreseeable future.

City of Brea General Fund Cash Flow Detail FY 18-19 through FY 23-24

Revenues							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Taxes	\$44,889,030	\$43,473,114	\$44,769,138	\$48,794,512	\$56,229,925	\$53,979,543	3.8%
License and Permits	606,355	823,019	451,865	350,510	393,659	287,697	-13.9%
Intergovernmental	9,107,164	9,406,073	15,377,259	9,299,024	14,203,467	10,171,867	2.2%
Charges for Services	3,810,657	4,251,831	1,758,530	3,115,543	3,446,957	3,898,624	0.5%
Investment Income	1,670,458	1,696,728	2,302,488	-2,958,325	1,097,842	3,073,878	13.0%
Fines and Forfeitures	682,762	403,116	279,487	352,127	323,185	325,010	-13.8%
Rental Income	1,662,487	1,026,581	896,057	993,185	2,580,302	2,906,180	11.8%
Other	3,017,005	3,834,593	3,506,041	3,101,245	2,354,378	2,738,884	-1.9%
Total Revenues	\$65,445,918	\$64,915,055	\$69,340,865	\$63,047,821	\$80,629,715	\$77,381,683	3.4%
Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
General Government	\$5,732,627	\$7,013,093	\$6,697,845	\$7,656,074	\$8,533,760	\$8,600,765	8.5%
Public Safety	35,120,119	37,688,380	38,281,869	40,546,864	42,440,042	46,272,277	5.7%
Community Services	2,716,848	2,813,755	2,745,297	2,683,703	2,496,372	9,488,694	28.4%
Community Development	7,540,687	7,584,500	6,607,980	8,269,116	9,612,938	3,010,068	-16.8%
Public Works	5,054,521	6,549,937	5,857,242	6,221,899	6,845,184	6,860,689	6.3%
Capital Outlay	10,549	137,920	166,596	496,648	537,016	1,087,593	152.7%
Debt Service							
...Principal	465,458	2,595,619	295,873	330,152	118,266	156,186	-19.6%
...Interest	368,468	351,681	197,523	68,330	92,968	91,456	-24.3%
Total Expenses	\$57,009,277	\$64,734,885	\$60,850,225	\$66,272,786	\$70,676,546	\$75,567,728	5.8%
Revenues/Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Revenues Over (Under) Expenditures	\$8,436,641	\$180,170	\$8,490,640	(\$3,224,965)	\$9,953,169	\$1,813,955	-26.5%
Fund Balances/Reserves (End of Year)							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Non-spendable	\$8,826	\$2,485	\$14,960	\$591	\$60	\$29,357	27.2%
Restricted	8,661,782	8,883,450	11,337,663	9,743,633	10,634,967	12,329,512	7.3%
Committed	980101	1353559	1,388,993	1382302	1,443,668	1540335	9.5%
Assigned	12,777,708	11,807,692	11,914,029	12,010,304	11,633,475	13,010,810	0.4%
Unassigned Fund Balance "Reserves"	\$21,203,689	\$19,891,722	\$29,410,655	\$25,265,822	\$29,344,926	\$28,051,499	5.8%
Year-end Total Fund Balance	\$43,632,106	\$41,938,908	\$54,066,300	\$48,402,652	\$53,057,096	\$54,961,513	4.7%

FULLERTON

The City of Fullerton experienced moderate revenue and expenditure growth in its General Fund between FY 18-19 and FY 23-24. Public safety was the City's largest expenditure category in all six years accounting for 73.7% of all expenditures as of FY 23-24. Additionally, in FY 23-24 the City experienced a significant spike in Public Safety costs because of the establishment of an in-house Fire Department. This transition required the hiring of key personnel as well as the purchase of new equipment and vehicles to support service delivery. Costs also rose following City Council approval of new labor agreements with all bargaining units, which included salary increases for both Fire and Police staff. Furthermore, higher pension expenses related to the City's Unfunded Actuarial Liability ("UAL") contributed to the overall increase in public safety expenditures. Meanwhile, charges for services revenues increased moderately over the reporting period resulting in an overall compound annual growth rate of 7.1% - or an annual increase of \$768,244.

Revenues compared to expenditures remained in a surplus in four out of the six years reviewed with FY 19-20 and FY 23-24 being in a deficit; this ties back to the significant increase in Public Safety costs as detailed above. According to City staff, the FY 2023-24 operating deficit was primarily attributable to increased personnel and pension-related expenditures, including salary adjustments under recently approved labor agreements and rising CalPERS unfunded liability costs, as well as slower revenue growth and declining sales tax revenues. City staff also noted that the FY 2022-23 surplus reflected one-time factors and does not directly offset the FY 2023-24 operating position, although it may help support overall fund balance stability.

Overall, the fiscal indicators show that the city's average expenditure growth exceeded revenue growth over the review period. The City Manager's FY 2023-24 transmittal letter also noted concerns regarding the City's ability to maintain its reserve targets in future years if current expenditure trends continue to outpace revenues, indicating potential long-term fiscal challenges. Despite these challenges, RSG determines that the City of Fullerton currently maintains sufficient financial capacity to provide municipal services and meet existing service obligations. Continued monitoring of expenditure trends, reserve



levels, and the long-term impacts associated with the transition to an in-house Fire Department will be important to support ongoing fiscal sustainability and organizational resiliency.

City of Fullerton General Fund Cash Flow Detail FY 18-19 through FY 23-24

Revenues							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Taxes	\$73,900,507	\$73,637,181	\$79,078,073	\$86,939,335	\$90,963,989	\$92,859,908	4.7%
Franchise Taxes	4,493,400	4,145,175	4,181,577	4,269,636	4,787,544	5,534,009	4.3%
License and Permits	2,783,564	2,146,566	2,405,502	2,736,503	3,207,838	2,292,622	-3.8%
Intergovernmental	918,441	740,465	1,614,725	1,470,672	909,964	650,572	-6.7%
Charges for Services	9,340,500	10,046,661	9,540,923	11,275,258	13,113,830	13,181,721	7.1%
Investment Earnings	6,171,974	4,042,744	2,478,936	2,675,955	4,686,501	5,573,334	-2.0%
Fines and Forfeitures	1,415,167	1,045,346	870,975	1,560,603	1,846,733	2,064,407	7.8%
Miscellaneous	1,502,966	1,201,766	1,071,570	1,173,555	1,051,314	1,451,739	-0.7%
Total Revenues	\$100,526,519	\$97,005,904	\$101,242,281	\$112,101,517	\$120,567,713	\$123,608,312	4.2%
Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
General Government	\$4,780,536	\$5,296,375	\$6,519,914	\$6,621,526	\$6,419,537	\$6,076,194	4.9%
Public Safety	67,598,481	71,519,867	71,600,929	75,591,918	82,546,276	91,357,962	6.2%
Community Development	5,283,962	5,741,451	4,517,182	4,988,203	6,156,871	5,500,596	0.8%
Human and Leisure	9,891,682	10,041,598	8,078,361	9,165,659	9,138,302	10,235,467	0.7%
Public Works	6,254,014	6,929,101	6,935,290	7,512,297	8,999,374	10,172,976	10.2%
Refuse Collection	-	-	-	-	-	-	N/A
Capital Outlay	398,638	94,448	12,684	21,963	-	-	N/A
Debt Service	-	-	-	-	690,575	243,658	N/A
...Principal	306,135	245,262	252,154	259,240	295,094	358,338	3.2%
...Interest	-	60,873	53,981	46,895	41,641	32,809	N/A
Total Expenses	\$94,513,448	\$99,928,975	\$97,970,495	\$104,207,701	\$114,287,670	\$123,978,000	5.6%
Revenues/Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Revenues Over (Under) Expenditures	\$6,013,071	(\$2,923,071)	\$3,271,786	\$7,893,816	\$6,280,043	(\$369,688)	-157.2%
Fund Balances/Reserves (End of Year)							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Non-spendable	\$6,528	\$3,213,549	\$2,907,996	\$713,481	\$312,710	\$402,643	128.0%
Restricted	1,386,437	672,186	1,514,050	1,518,813	1,518,712	1,892,325	6.4%
Committed	-	-	-	438,687	1,535,971	3,277,873	N/A
Assigned	15,656,277	13,958,385	16,140,010	18,569,739	19,808,804	22,962,550	8.0%
Subtotal	17,049,242	17,844,120	20,562,056	21,240,720	23,176,197	28,535,391	10.9%
Unassigned Fund Balance "Reserves"	\$5,431,932	\$217,388	-	\$4,033,848	\$10,311,002	\$10,121,444	13.3%
Year-end Total Fund Balance	\$22,481,174	\$18,061,508	\$20,562,056	\$25,274,568	\$33,487,199	\$38,656,835	11.5%

LA HABRA

The City of La Habra experienced moderate revenue and low expenditure growth in its General Fund between FY 18-19 and FY 23-24. Public safety was the City's largest expenditure category in all six years accounting for 65.8% of all expenditures as of FY 23-24. Additionally, in FY 21-22 the City experienced a significant spike in Public Safety costs because of the OC Fire contract cost increase. However, based on information provided by La Habra, the City intends to address the rising costs in Public Safety through an overall budget cut of approximately \$6.2 million as reflected in their FY 24-25 budget. Expenditures tied to Capital Outlay also increased significantly between FY 21-22 and FY 23-24 due to timing-related accounting adjustments, including a deferred inflow of resources adjustment associated with the City's public safety pension plan, which elevated reported expenses in the earlier year and normalized in the current year. During the reporting period, service revenue charges experienced moderate growth, resulting in a compound annual growth rate of 7.8%, equivalent to an annual increase of \$449,519. Additionally, the intergovernmental revenue also has a high compound annual growth rate of 20.8%. Revenues compared to expenditures remained in a surplus in five out of the six years reviewed with FY 21-22 being in a deficit; this ties back to the significant increase in Public Safety costs as detailed above. Despite this anomaly, the City maintained a moderate fund balance in all six years reviewed. Therefore, RSG determines the City of La Habra has the sufficient financial ability to meet service needs now and into the foreseeable future.

City of La Habra General Fund Cash Flow Detail FY 18-19 through FY 23-24

Revenues							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Property Taxes	\$17,527,982	\$18,749,790	\$19,894,873	\$21,047,527	\$22,485,337	\$23,640,653	6.2%
Sales and Use Tax	11,373,624	11,344,359	12,871,187	14,952,502	14,553,839	13,853,575	4.0%
Transaction and Use Tax	5,854,399	5,752,140	6,726,948	7,638,582	7,779,709	7,610,758	5.4%
Franchise Tax	1,910,805	1,983,537	1,997,428	2,097,646	2,227,559	2,580,172	6.2%
Intergovernmental	30,168	50,291	46,479	72,559	64,352	77,548	20.8%
Licenses and Permits	1,421,342	1,360,776	1,502,214	1,804,980	2,085,832	2,508,789	12.0%
Charges for Services	4,964,559	5,036,161	5,312,256	5,615,420	6,070,021	7,212,156	7.8%
Fines and Forfeitures	848,817	733,065	744,201	1,096,794	1,581,075	1,112,306	5.6%
Use of Money and Property	4,385,383	2,821,874	2,667,306	1,658,867	3,358,922	4,296,625	-0.4%
Other	266,759	198,902	45,249	93,991	57,452	93,955	-18.8%
Total Revenues	\$48,583,838	\$48,030,895	\$51,808,141	\$56,078,868	\$60,264,098	\$62,986,537	5.3%
Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
General Government	\$3,027,302	\$3,050,978	\$3,159,686	\$5,206,581	\$3,760,654	\$3,631,407	3.7%
Public Safety	29,220,591	30,727,821	31,631,514	87,595,131	26,877,604	33,422,816	2.7%
Public Works	5,159,805	5,262,066	5,110,912	8,600,630	5,556,650	6,033,607	3.2%
Community Services	3,604,106	3,341,646	3,232,285	9,303,190	3,905,510	4,808,573	5.9%
Community Development	1,827,000	2,033,365	2,290,415	4,383,523	2,702,881	2,822,360	9.1%
Capital Outlay	1,174,590	-	-	44,153	79,980	82,096	N/A
Debt Service	-	-	-	-	-	-	N/A
...Principal	319,754	203,403	130,997	1,050,116	-	-	N/A
...Interest	79,883	60,653	54,225	518,407	-	-	N/A
Total Expenses	\$44,413,031	\$44,679,932	\$45,610,034	\$116,701,731	\$42,883,279	\$50,800,859	2.7%
Revenues/Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Revenues Over (Under) Expenditures	\$4,170,807	\$3,350,963	\$6,198,107	(\$60,622,863)	\$17,380,819	\$12,185,678	23.9%
Fund Balances/Reserves (End of Year)							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Non-spendable	\$4,425,438	\$2,715,606	\$2,043,647	\$1,066,199	\$15,403	\$17,827	-66.8%
Restricted	834,185	2,015,009	3,105,457	3,410,091	4,800,802	10,796,031	66.9%
Committed	-	-	-	-	-	-	N/A
Assigned	2,950,000	3,555,000	5,983,680	4,172,063	6,626,824	6,751,172	18.0%
Unassigned Fund Balance "Reserves"	\$7,717,970	\$8,602,672	\$8,325,715	\$10,233,206	\$11,359,983	\$13,588,010	12.0%
Year-end Total Fund Balance	\$15,927,593	\$16,888,287	\$19,458,499	\$18,881,559	\$22,803,012	\$31,153,040	14.4%

PLACENTIA

The City of Placentia experienced high revenue and expenditure growth in its General Fund between FY 18-19 and FY 23-24. Public safety was the City's largest expenditure category in all six years reviewed - accounting for 26.8% of all expenditures as of FY 23-24. However, in FY 22-23 the City experienced a significant spike in Capital Outlay costs largely due to ARPA-funded infrastructure development projects, including \$9 million of funding allocated for establishing a public safety building and several other development projects. During the reporting period, intergovernmental revenues experienced substantial growth, with a compound annual growth rate of 50.4%, corresponding to an average yearly increase of \$472,791. Investment income also demonstrated notable volatility but maintained robust overall growth, achieving a compound annual growth rate of 48.2% and an average annual increase of \$202,227. The revenues compared to expenditures remained in a surplus in four out of the six years reviewed with FY 19-20 and FY 23-24 being in a deficit; reflecting the cited increase in capital cost detailed above. Despite these shortfalls, the City maintained high fund balances in the last four of six years reviewed. Therefore, RSG determines the City of Placentia has sufficient financial ability to meet service needs now and into the foreseeable future.

City of Placentia General Fund Cash Flow Detail FY 18-19 through FY 23-24

Revenues							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Taxes	\$29,671,258	\$34,830,127	\$37,858,390	\$41,621,461	\$44,429,339	\$45,847,060	9.1%
Intergovernmental	353,354	701,864	9,743	952,389	8,640,895	2,717,309	50.4%
Licenses and Permits	1,922,689	2,453,827	2,827,761	2,440,102	2,643,941	2,535,885	5.7%
Fines and Forfeitures	438,581	418,752	290,534	503,302	457,065	548,960	4.6%
Investment Earnings	164,724	170,567	-28,258	-323,152	67,366	1,175,860	48.2%
Charges for Services	1,070,821	885,206	879,298	1,263,215	1,364,054	1,441,304	6.1%
Leases and Rents	1,230,532	1,211,622	1,079,979	1,422,831	1,572,445	1,677,641	6.4%
Contributions from Successor Agency	-	19,000	30,000	-	-	-	N/A
Miscellaneous	944,874	866,076	460,006	785,684	1,385,763	1,125,980	3.6%
Total Revenues	\$35,796,833	\$41,557,041	\$43,407,453	\$48,665,832	\$60,560,868	\$57,069,999	9.8%
Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
General Government	\$7,823,758	\$8,298,766	\$10,911,110	\$12,055,475	\$15,748,766	\$15,336,829	14.4%
Public Safety	17,861,015	21,399,386	14,899,543	15,441,982	16,357,168	18,491,792	0.7%
Public Works	3,435,887	3,980,719	3,430,456	3,514,281	4,100,553	5,350,268	9.3%
Community Services	997,888	1,198,254	1,215,937	1,482,732	1,718,087	1,809,970	12.6%
Community Development	1,343,251	1,537,369	1,437,912	2,289,940	2,617,825	3,431,853	20.6%
Capital Outlay	719,324	7,271,232	3,811,664	5,034,753	14,475,128	22,021,540	98.2%
Debt Service	-	-	-	-	-	-	N/A
...Principal	1,545,000	582,614	1,270,240	1,320,810	2,438,273	2,366,341	8.9%
...Payment to Refunding Agency	-	-	-	488,521	-	-	N/A
...Interest	293,723	206,426	391,808	343,759	252,565	231,958	-4.6%
...Debt Issuance Costs	-	-	-	117,995	-	-	N/A
Total Expenses	\$34,019,846	\$44,474,766	\$37,368,670	\$42,090,248	\$57,708,365	\$69,040,551	15.2%
Revenues/Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Revenues Over (Under) Expenditures	\$1,776,987	(\$2,917,725)	\$6,038,783	\$6,575,584	\$2,852,503	(\$11,970,552)	-246.4%
Fund Balances/Reserves (End of Year)							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Non-spendable	\$4,706,295	\$3,734,003	\$3,346,897	\$2,521,767	\$1,453,892	\$895,672	-28.2%
Restricted	571,396	555,259	556,084	2,024	805,521	1,643,582	23.5%
Committed	4,528,259	5,810,898	6,433,605	13,855,723	4,534,708	1,036,860	-25.5%
Assigned	-	-	-	-	-	-	N/A
Unassigned Fund Balance "Reserves"	\$543,287	\$3,866,292	\$9,893,885	\$7,204,966	\$19,918,635	\$14,795,659	93.7%
Year-end Total Fund Balance	\$10,349,237	\$13,966,452	\$20,230,471	\$23,584,480	\$26,712,756	\$18,371,773	12.2%

YORBA LINDA

The City of Yorba Linda experienced moderate revenue and expenditure growth in its General Fund between FY 18-19 and FY 23-24. Public Safety was Yorba Linda's largest expenditure category in each fiscal year, accounting for 32.4% of all expenditures as of FY 23-24. Although expenditures increased across multiple departments in this timeframe, Capital Outlays and Debt Service payments dropped significantly by FY 23-24; this can be largely attributed to the completion of prior one-time capital investments, including the purchase of a new ERP system, as well as the accounting impacts of implementing GASB 96 for Subscription-Based Information Technology Arrangements ("SBITAs"), which shifted certain technology costs away from traditional capital outlay and debt categories. Meanwhile charges for services and investment income increased significantly, growing by 44.1% and 73.8% respectively. Revenues compared to expenditures remained in a surplus in five out of the six years reviewed, peaking in FY 23-24 at \$5.2 million. Similarly, Yorba Linda maintained high fund balances in all six years reviewed. Therefore, RSG determines the City of Yorba Linda has sufficient financial ability to meet service needs now and into the foreseeable future.

City of Yorba Linda General Fund Cash Flow Detail FY 18-19 through FY 23-24

Revenues							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Taxes	\$30,669,255	\$31,574,712	\$32,103,271	\$35,346,788	\$36,662,832	\$37,421,910	4.1%
Licenses and Permits	1,758,173	1,758,957	1,905,891	2,502,333	2,446,906	1,715,183	-0.5%
Intergovernmental	612,078	532,041	492,362	116,301	788,451	747,230	4.1%
Charges for Services	3,699,460	3,059,130	3,169,493	4,408,727	4,940,900	5,332,330	7.6%
Investment Income	938,802	1,084,790	111,580	(\$1,087,169)	631,091	1,632,083	11.7%
Fines and Forfeitures	57,028	40,733	19,483	42,094	43,277	50,842	-2.3%
Developer Participation	-	-	-	-	-	-	N/A
Gain on Sale of City Property	10,759	438,953	12,114	-	-	276,193	N/A
Contributions from Successor Agency	227,444	87,345	-	-	-	-	N/A
Miscellaneous	362,028	235,957	1,094,226	301,015	1,268,501	1,670,346	35.8%
Total Revenues	\$38,335,027	\$38,812,618	\$38,908,420	\$41,630,089	\$46,781,958	\$48,846,117	5.0%
Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
General Government	\$7,535,226	\$8,892,541	\$8,915,761	\$9,347,952	\$9,839,477	\$10,383,636	6.6%
Public Safety	11,774,157	12,403,651	12,584,332	10,608,075	13,664,873	14,134,730	3.7%
Community Development	2,839,186	3,169,389	3,073,170	3,646,948	3,587,102	4,041,043	7.3%
Parks and Recreation	6,652,263	6,330,386	6,317,469	7,805,197	8,527,887	9,249,343	6.8%
Library	-	-	-	-	-	-	N/A
Public Works	4,026,642	4,284,389	4,663,484	5,311,119	5,996,038	5,352,685	5.9%
Capital Outal	739,041	2,294,806	1,552,009	553,459	1,310,291	321,171	-15.4%
Debt Service	-	-	108,271	-	-	-	N/A
...Principal	-	-	-	7,611,000	128,195	127,915	N/A
...Interest	-	-	-	277,954	654	6,490	N/A
Total Expenses	\$33,566,515	\$37,375,162	\$37,214,496	\$45,161,704	\$43,054,517	\$43,617,013	5.4%
Revenues/Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Revenues Over (Under) Expenditures	\$4,768,512	\$1,437,456	\$1,693,924	(\$3,531,615)	\$3,727,441	\$5,229,104	1.9%
Fund Balances/Reserves (End of Year)							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Non-spendable	\$24,183,522	\$2,850,846	\$627,888	\$33,115	\$86,578	\$82,284	-67.9%
Restricted	-	-	-	-	-	-	N/A
Committed	23,252,150	27,742,190	31,713,494	31,849,609	26,109,298	27,118,359	3.1%
Assigned	2,115,847	2,208,550	1,102,561.00	2,024,793.00	14,407,135.00	14,890,559.00	47.7%
Unassigned Fund Balance "Reserves"	\$4,953,048	\$3,755,960	\$3,736,844	\$8,698,134	\$3,825,726	\$2,142,419	-15.4%
Year-end Total Fund Balance	\$54,504,567	\$36,557,546	\$37,180,787	\$42,605,651	\$44,428,737	\$44,233,621	-4.1%

PLACENTIA LIBRARY DISTRICT

The Placentia Library District experienced high revenue growth and moderate expenditure growth in its General Fund between FY 18-19 and FY 23-24. Aside from Capital Outlay, Salaries and benefits reflected one of the District's largest expenditure category in five out of the six years reviewed - accounting for 61.7% of all expenditures as of FY 23-24. However, in FY 18-19 and FY 19-20, the District experienced a significant spike in Capital Outlay costs, which is largely due to the Centennial renovation project. This project included a new library layout, an enhanced children's area, two additional group study rooms equipped with monitors, three passport rooms, dedicated STEM study spaces, more computers, and expanded library services for both children and adults.

Additionally, the District experienced a rise in professional services, with an average annual increase of \$26,414 or a compound annual growth rate of 11.3% during the reporting period. In terms of revenues, property taxes account for a majority of revenues for the District consistently over the report period and account for 82.6% of all revenues as of FY 23-24. Grant and contribution revenues experienced a compound annual growth rate of 20.6% over the reporting period, reflecting an upward trend in external funding and intergovernmental support. The District has ceased charging fees to library patrons since 2017 to remove barriers to access, particularly for low-income residents, while aligning with national best practices, supporting literacy and student success, and advancing its mission of providing equitable community access while building trust and goodwill.

Revenues compared to expenditures remained in a surplus in the most recent four out of the six years reviewed, with FY 2018-19 and FY 19-20 being in a deficit; reflecting the cited increase in capital cost detailed above. Despite this anomaly, the District maintained high fund balances in all six years reviewed. The District also provides a defined contribution retirement plan that eliminates the risk and cost of future unfunded pension liabilities and improves fiscal predictability compared to typical PERS defined benefit plans. Therefore, RSG determines the Placentia Library District has sufficient financial ability to meet service needs now and into the foreseeable future.

Placentia Library District General Fund Cash Flow Detail FY 18-19 through FY 23-24

Revenues							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Property Taxes	\$2,614,136	\$2,685,728	\$2,816,075	\$2,888,746	\$3,183,254	\$3,469,855	5.8%
Grants and Contributions	107,545	349,997	82,417	300,027	666,250	274,500	20.6%
Library Income	280,430	172,893	194,038	317,016	269,988	253,693	-2.0%
Impact Fees	72,071	230,641	469,084	150,418	172,024	77,926	1.6%
Investment Income	51,260	46,482	9,661	4,977	19,779	126,368	19.8%
Miscellaneous	-	1,973	705	-	32	-	N/A
Total Revenues	\$3,125,442	\$3,487,714	\$3,571,980	\$3,661,184	\$4,311,327	\$4,202,342	6.1%
Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Salaries and Benefits	\$1,840,328	\$1,924,453	1,873,058	2,006,115	2,335,839	2,343,763	5.0%
Office and Administration	177,261	169,456	144,120	151,871	286,736	245,537	6.7%
Books and Library Materials	329,479	279,630	221,223	303,996	505,216	337,054	0.5%
Professional Services	185,668	158,531	106,314	233,372	284,088	317,740	11.3%
Maintenance	355,514	27,112	110,679	178,165	149,874	192,067	-11.6%
Library Program	36,485	74,964	75,761	49,030	10,248	74,570	15.4%
Miscellaneous	41,187	28,993	11,566	1,338	118,772	-	N/A
Capital Outlay	3,006,397	1,242,555	66,672	67,913	-	207,114	N/A
Debt Service	-	-	-	-	-	-	N/A
...Principal	31,637	32,681	33,760	34,874	36,025	44,522	7.1%
...Interest	32,118	38,017	36,920	39,094	37,819	36,754	2.7%
Total Expenses	\$6,036,074	\$3,976,392	\$2,680,073	\$3,065,768	\$3,764,617	\$3,799,121	-8.8%
Revenues/Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Revenues Over (Under) Expenditures	(\$2,910,632)	(\$488,678)	\$891,907	\$595,416	\$546,710	\$403,221	N/A
Fund Balances/Reserves (End of Year)							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Non-spendable	\$29,092	\$60,475	\$35,392	\$58,298	\$201,057	\$121,065	33.0%
Restricted	-	230,641	473,772	736,690	1,358,044	1,458,402	N/A
Committed	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-
Unassigned Fund Balance "Reserves"	\$2,569,379	\$1,818,677	\$2,492,536	\$2,802,128	\$2,599,470	\$2,982,325	3.0%
Year-end Total Fund Balance	\$2,598,471	\$2,109,793	\$3,001,700	\$3,597,116	\$4,158,571	\$4,561,792	11.9%

YORBA LINDA WATER DISTRICT

The Yorba Linda Water District experienced high revenue and expenditure growth in its General Fund between FY 18-19 and FY 23-24.⁵⁰ Water cost was the District's largest expenditure category in all six years reviewed - accounting for 32.1% of all expenditures as of FY 23-24. Costs tied to personnel service closely followed, accounting for 25.4%. Additionally, the District's supplies and services rose between FY 18-19 and FY 23-24, with a total average annual increase of \$835,323, representing a compound annual growth rate of 13.8%. Water sales account for a majority of revenues for the District consistently over the report period and account for 77.0% of all revenues as of FY 23-24. This suggests the District relies more on its sales revenue than from property tax, which only accounts for 4.4% of all revenues in FY 23-24.

Despite the overall 8.2% compound annual revenue increases experienced between FY 18-19 through FY 23-24, the District's net income was in a deficit in four out of the six years reviewed: with a small surplus in FY 22-23, improving significantly by FY 23-24. This may be due to the decline in other nonoperating revenues which went from \$1.0 million in FY 18-19 to \$461,239 by FY 23-24, an overall annual decline of 14.6%. Despite these shortfalls, Yorba Linda Water District maintained high unrestricted net positions in all six years. The district's total fund balance increased from approximately \$165.4 million in FY 2018-19 to \$193.5 million in FY 2023-24, reflecting a 3.2% overall annual growth. RSG determines that the Yorba Linda Water District has sufficient financial capacity to meet service needs now and into the foreseeable future.

⁵⁰ Yorba Linda Water District had a \$26 million capital contribution from Orange County Water District (OCWD) to fund PFAS treatment plant which was subsequently transferred to OCWD.

Yorba Linda Water District General Fund Cash Flow Detail FY 18-19 through FY 23-24

Revenues							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Water Sales	\$29,819,532	\$32,192,312	\$35,539,146	\$38,495,864	\$36,880,380	\$42,366,064	7.3%
Sewer revenues	2,528,020	2,731,285	2,743,000	3,204,396	3,453,202	4,002,126	9.6%
Other operating revenues	1,014,691	896,107	968,455	1,275,632	1,273,958	1,963,537	14.1%
Property Taxes	1,874,688	1,961,002	2,072,582	2,157,211	2,323,369	2,423,322	5.3%
Investment income	819,522	694,705	246,942	179,375	1,279,458	3,302,499	32.1%
Annexation revenue fees	-	-	-	-	-	495,143	N/A
Other nonoperating revenues	1,014,495	1,104,622	1,249,200	209,976	973,139	461,239	-14.6%
Total Revenues	\$37,070,948	\$39,580,033	\$42,819,325	\$45,522,454	\$46,183,506	\$55,013,930	8.2%
Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Variable water costs	\$13,327,860	\$16,916,388	\$18,638,471	\$20,603,385	\$15,308,429	\$16,900,164	4.9%
Personnel services	9,538,167	10,890,404	10,947,895	11,016,220	10,348,225	13,352,318	7.0%
Supplies and services	4,592,521	4,754,718	5,459,423	6,297,722	8,100,671	8,769,138	13.8%
Depreciation	7,322,753	7,757,139	7,858,355	7,935,696	9,094,787	9,188,082	4.6%
Interest expense	1,350,616	1,309,883	1,293,830	1,249,313	2,408,426	2,218,001	10.4%
Gain (Losses) on sale of capital asset	-	-	-	-	-	2,190,824	N/A
Other nonoperating expenses	1,550,378	137,569	859,403	21,141	358,045	32,180	-53.9%
Total Expenses	\$37,682,295	\$41,766,101	\$45,057,377	\$47,123,477	\$45,618,583	\$52,650,707	6.9%
Revenues/Expenditures							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Revenues Over (Under) Expenditures	(\$611,347)	(\$2,186,068)	(\$2,238,052)	(\$1,601,023)	\$564,923	\$2,363,223	N/A
Fund Balances/Reserves (End of Year)							
	FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	Trend
Net Investment in Capital Assets	\$152,297,398	\$148,308,815	\$146,951,549	\$145,238,227	\$165,329,003	\$158,153,034	0.8%
Restricted	-	-	-	-	-	-	N/A
Water Conservation	103,420	105,785	105,862	105,862	105,862	82,082	-4.5%
Pension Benefits	-	1,417,430	961,169	832,430	889,808	989,118	N/A
OPEB	1,960,545	608,558	740,332	306,736	327,776	364,360	-28.6%
Depository Cash	-	-	-	1,024,344	550,111	355,083	N/A
Unrestricted	11,075,303	13,840,027	15,335,639	15,275,541	22,168,454	33,591,567	24.8%
Year-end Total Fund Balance	\$165,436,666	\$164,280,615	\$164,094,551	\$162,783,140	\$189,371,014	\$193,535,244	3.2%

IX. OPPORTUNITIES FOR SHARED FACILITIES

Pursuant to Government Code Section 56430, MSRs make determinations on seven (7) required topics, including:

5. Status of, and opportunities for, shared facilities;

The North Region includes one special district – Yorba Linda Water District – that provides multi-jurisdictional services. This includes providing retail water to the City of Yorba Linda and to portions of the cities of Brea and Placentia. This long-standing service configuration reflects existing shared infrastructure networks.

The Placentia Library District provides library services to residents within City of Placentia consistent with its jurisdictional boundaries but maintains its own independent Board and personnel. The City of Placentia and the Placentia Library District have an agreement in place for the joint use of a civic center campus arrangement where each agency owns its own parcel and building area, but they jointly use and maintain common facilities - most notably the shared parking lot and related common-area improvements (e.g., walkways and landscaping). Additionally, cities within the North Region continue to rely on Orange County for certain regionalized services, including animal control, regional park facilities, and library services (where applicable). These arrangements reflect coordinated service delivery models that leverage economies of scale and reduce administrative duplication.

This MSR evaluation considered whether additional shared facilities may enhance efficiency. Interviews and survey responses did not identify new or expanded opportunities for shared facilities beyond the existing arrangements described above. Agencies generally indicated that current cooperative agreements are functioning effectively and are adequately meeting service demands.

Accordingly, no additional shared facilities opportunities were identified at this time. The existing multi-jurisdictional service relationships and interagency coordination mechanisms appear sufficient to support continued service provision within the North Region.

X. ACCOUNTABILITY, GOVERNMENT STRUCTURE AND OPERATIONAL EFFICIENCIES

Pursuant to Government Code Section 56430, MSRs make determinations on seven (7) required topics, including:

- 6. Accountability for community service needs, including government structure and operational efficiencies.*
- 7. Any other matter related to effective or efficient service delivery, as required by Commission Policy.*

Agencies in the North Region implement policies and procedures that ensure transparency and accountability to the public, including appropriate elections and public notice of agency meetings and actions. Each agency has a formal governing body that is elected, and all agencies conduct regularly scheduled public hearings pursuant to Government Code §54954. Many agencies stream their public hearings on platforms such as Zoom. All of the North Region agencies maintain websites that contain general information on City and District departments, activities, and events. Overall, agencies in the North Region function efficiently and are structurally strong.

The Cities of Brea, Fullerton, La Habra, and Yorba Linda are general law cities. Each city operates under a Council-Manager form of government in which the City Council appoints a City Manager responsible for overseeing day-to-day municipal operations and implementing policy direction established by the Council. Placentia is a charter city and operates under its voter-adopted city charter. Similar to the other cities in the North Region, Placentia utilizes a Council-Manager form of government, whereby the City Council establishes policy and appoints a City Administrator responsible for overseeing day-to-day municipal operations and implementing Council direction.

City Councils in the North Region generally consist of five members, including the Mayor. In most cases, council members are elected either at-large or by district, depending on the city's adopted electoral structure. The Mayor may be directly elected by voters or selected from among the City Council members to serve a designated term, depending on the specific governance structure established by each city.

The Placentia Library District and Yorba Linda Water District are independent special districts that provide library, and/or water and wastewater services within portions of the North Region. The Placentia Library District is governed by a five-member Board of Trustees elected by district to serve four-year terms. The Yorba Linda Water District is governed by a five-member Board of Directors elected at-large to serve four-year terms. These boards are responsible for establishing policy, adopting budgets, and overseeing district operations to ensure the continued provision of services to residents within their respective service areas.

Overall, the agencies reviewed demonstrate strong governance compliance and accountability practices. All agencies maintain active websites where agendas and meeting minutes are publicly accessible, supporting transparency and public engagement. Budgets and financial audits are generally posted online and available for public review.

The agencies' spheres of influence are largely coterminous with their service areas and are generally consistent with the land use designations identified in their respective General Plans. No governance instability or operational concerns were identified among the agencies reviewed.

No additional matters related to effective and efficient service delivery have been identified for review in this MSR by OC LAFCO or the North Region agencies.



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Adopt Resolution 2026-03 approving the amended 2026-2027 Fiscal Year Budget

DATE: June 22, 2026

BACKGROUND

The 2026-2027 Budget has been amended to reflect operational needs, service enhancements, strategic staffing investments, updated revenue projections, and expenditure adjustments that support the District's mission while maintaining prudent fiscal management. The proposed amendments are intended to strengthen public service delivery, improve organizational capacity, support employee retention and development, and ensure responsible stewardship of public resources. The amendments for the Library Board of Trustee's considerations include:

Salaries & Benefits

1. Compensation and Staffing Adjustments

2% Cost-of-Living Adjustment (COLA)

The amended budget includes a 2% Cost-of-Living Adjustment (COLA) for eligible employees. This adjustment helps maintain competitive compensation, supports employee retention, and recognizes the impact of rising living costs while remaining fiscally responsible and sustainable within the District's long-term financial plan.

2. Increase in Full-Time Equivalent (FTE) Positions

The amended budget increases authorized staffing from 21.52 FTE to 23.38 FTE to address growing operational demands and service expectations. The additional staffing capacity will enhance customer service, improve operational efficiency, and provide greater organizational resiliency.

3. Continuation of Substitute Staffing

To ensure uninterrupted public service and maintain scheduling flexibility, the budget continues funding for:

- Adult Services Substitute Librarian – 15 hours per week
- Children's Services Substitute Librarian – 15 hours per week
- Library Clerk Substitute – 15 hours per week
- Library Page Substitute – 10 hours per week

Maintaining substitute staffing minimizes service disruptions caused by vacancies, employee leave, training, and seasonal fluctuations while reducing overtime costs and preserving service levels for patrons.

4. Marketing and Social Media Specialist Position

The budget establishes a new Marketing and Social Media Specialist position. This position will strengthen community engagement, increase public awareness of library programs and services, enhance digital communications, support outreach initiatives, and improve the District's ability to connect with

residents through modern communication platforms. Increased visibility and engagement help maximize community utilization of library resources and programs.

5. Temporary Accounting Intern Position

The budget includes a temporary Accounting Intern position to assist the Business Manager with preparation of the annual audit, including but not limited to account reconciliations and identification of discrepancies or variances.

6. Information Technology Manager Position

The amended budget includes the addition of an Information Technology Manager position. As technology continues to play a critical role in library operations, cybersecurity, digital services, network infrastructure, and public computing, dedicated technology leadership is essential. This position will improve operational reliability, reduce technology-related risks, strengthen cybersecurity practices, and support strategic technology planning that benefits both staff and the community.

7. LEAP Page Hours Increase

The budget increases LEAP Page staffing by an additional 10 hours per week. This enhancement provides additional support for materials handling, shelving, collection maintenance, and public service operations while expanding meaningful workforce development opportunities through the LEAP program. As a public library district, the organization recognizes the importance of creating an inclusive environment that reflects the diverse community it serves while fostering a workplace culture that values the contributions and abilities of all individuals. The additional hours will help offset the loss of a long-time special needs volunteer who contributed an average of 500 hours annually during his time with the District.

8. Education Reimbursement Increase

The budget includes a 100% increase in the Education Reimbursement program. Investing in employee education supports professional growth, in particular, current staff members pursuing their master's degree in library and information science. Continued staff development strengthens the District's workforce and enhances the quality of services provided to the community.

Supplies and Services Adjustments

1. Communications Budget Reduction

The Communications budget line item reflects an 82% decrease compared to Fiscal Year 2024-2025 actual expenditures. This significant reduction is primarily attributable to the elimination of printed publication and distribution costs associated with the District newsletter. The transition to digital communication methods maintains community outreach while substantially reducing operating expenses and supporting environmentally responsible practices.

2. Placentia Library Friends Foundation Funding

The budget includes \$67,969 in funding received from the Placentia Library Friends Foundation (PLFF). These funds support programs, collections, services, and initiatives that directly benefit library patrons and supplement District resources. The continued partnership with the Foundation allows the District to expand service opportunities while minimizing impacts on taxpayer-supported revenues.

3. Library Books and Materials Investment

The amended budget allocates 7.5% of total expenditures to library books and materials, demonstrating the District's ongoing commitment to maintaining a current, relevant, and responsive collection. This investment supports literacy, lifelong learning, educational success, workforce development, and recreational reading opportunities for community members of all ages.

4. Travel and Meetings Reduction

The budget reflects a 32% decrease in the Travel and Meetings budget. This reduction demonstrates the District's commitment to controlling discretionary expenditures while continuing to provide essential professional development opportunities. Staff will utilize cost-effective training methods whenever feasible, including virtual conferences, webinars, and regional training opportunities.

5. Technology Infrastructure and Equipment Investment

The amended Fiscal Year 2026-2027 Budget includes \$146,750 in funding for technology infrastructure and equipment improvements to support the District's growing reliance on technology for both public and administrative services. The proposed investment will support the replacement and maintenance of aging technology equipment, network infrastructure improvements, cybersecurity enhancements, software and systems upgrades, public access technology, and other technology-related assets necessary to ensure uninterrupted service delivery. These investments help reduce the risk of service disruptions, equipment failures, cybersecurity threats, and unplanned emergency expenditures that can result from deferred maintenance and aging systems.

The proposed 2026-2027 Fiscal Year Budget amendments reflect a zero-balanced and responsible approach to meeting the evolving needs of the community while maintaining the District's strong commitment to fiscal stewardship. The budget strategically invests in personnel, technology, public services, collections, and community engagement while identifying opportunities for cost savings and operational efficiencies. Adoption of the amended budget will position the District to continue delivering high-quality library services, enhance organizational effectiveness, and responsibly manage public resources for the benefit of current and future residents.

Attachment A Resolution 2026-03
Attachment B Revenue Budget
Attachment C Expenditure Budget
Attachment D Salary Scale
Attachment E Organizational Chart
Attachment F Accounting Intern Job Description
Attachment G Technology Budget

RECOMMENDATIONS

1. Motion to adopt Resolution 2026-03 approving the amended 2026–2027 Fiscal Year Budget as presented, including input received from the Library Board of Trustees; and,
2. A roll call vote.

RESOLUTION 2026-03**A RESOLUTION OF THE LIBRARY BOARD OF TRUSTEES OF THE PLACENTIA
LIBRARY DISTRICT OF ORANGE COUNTY APPROVING AMENDMENTS TO THE
2026-2027 FISCAL YEAR BUDGET**

WHEREAS, the Board of Trustees of the Placentia Library District ("District") adopted the 2026-2027 Fiscal Year Budget to provide funding necessary for the operation of District programs, services, facilities, personnel, and activities; and

WHEREAS, the District has reviewed current operational needs, service priorities, staffing requirements, revenue projections, and expenditure allocations and determined that amendments to the 2026-2027 Fiscal Year Budget are necessary and appropriate; and

WHEREAS, the proposed amendments include a two percent (2%) Cost-of-Living Adjustment (COLA) for eligible employees to support employee retention and maintain competitive compensation; and

WHEREAS, the proposed amendments increase authorized staffing from 21.52 Full-Time Equivalent (FTE) positions to 23.38 Full-Time Equivalent (FTE) positions to strengthen organizational capacity and improve service delivery to the community; and

WHEREAS, the proposed amendments continue substitute staffing allocations for Adult Services, Children's Services, Library Clerk, and Library Page positions to ensure continuity of library operations and public service; and

WHEREAS, the proposed amendments establish a Marketing and Social Media Specialist position to enhance community engagement, outreach, public awareness, and utilization of library programs and services; and

WHEREAS, the proposed amendments establish a temporary Accounting Intern position to provide assistance for the annual audit preparations; and

WHEREAS, the proposed amendments establish an Information Technology Manager position to strengthen technology infrastructure, cybersecurity, digital services, and operational efficiency; and

WHEREAS, the proposed amendments increase LEAP Page staffing hours by ten (10) hours per week to support library operations and the District's commitment to workforce development opportunities for adults with special needs; and

WHEREAS, the proposed amendments reduce communications expenditures by approximately eighty-two percent (82%) from the 2024-2025 Fiscal Year actual expenditures through the elimination of printed District newsletters and the implementation of more cost-effective digital communication methods; and

WHEREAS, the amended budget dedicates approximately seven percent (7%) of budgeted expenditures to library books and materials, reflecting the District's commitment to maintaining a robust and responsive collection; and

WHEREAS, the amended budget includes a thirty-two percent (32%) reduction in travel and meeting expenditures while preserving essential professional development opportunities; and

WHEREAS, the amended budget includes a one hundred percent (100%) increase in education reimbursement funding to support employees pursuing a master's degree in library and information science; and

WHEREAS, the Board of Trustees finds that the proposed budget amendments are consistent with the District's mission, strategic priorities, and commitment to fiscal responsibility, transparency, and stewardship of public funds.

NOW, THEREFORE, BE IT RESOLVED by the Board of Trustees of the Placentia Library District passed, approved, and adopted on the twenty-second day of June, 2026, by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

Gayle Carline, President, Board of Trustees

ATTEST:

Sherri Dahl, Secretary, Board of Trustees

PLACENTIA LIBRARY DISTRICT**Proposed Revenue Budget for Fund 707 for Fiscal Year 2025-2027**

OBJECT	2024-2025	2025-2026	2025-2026	2026-2027	2026-2027
CODE DESCRIPTION	ACTUAL	ADOPTED	PROJECTED	ADOPTED	AMENDED
4010 Current Secured	3,338,198	3,352,095	3,555,073	3,419,137	3,697,276
4030 Prior Secured					
SUB-TOTAL CURRENT SECURED	3,338,198	3,352,095	3,555,073	3,419,137	3,697,276
4020 Current Unsecured	102,583	100,576	103,031	102,588	107,152
4040 Prior Unsecured	0	0	0	0	0
SUB-TOTAL UNSECURED	102,583	100,576	103,031	102,588	107,152
4050 SUPPLEMENTAL -- CURRENT	77,084	76,353	76,291	77,880	79,342
4060 SUPPLEMENTAL -- PRIOR	0	0	0	0	0
4070 INTEREST ON UNNAPORT. TAX	8,838	8,575	8,569	8,747	8,912
4080 PENALTIES & COST ON DELIQ. TAX	28,373	28,940	34,310	29,519	35,682
4090 TAXES SPECIAL DIST. AUGMENTATION	9,338	9,451	9,599	9,640	9,640
4180 OTHER REVENUE	69,837	0	41,942	60,000	45,000
4190 STATE - HOMEOWNERS PR TAX RELIEF	12,223	12,491	12,060	12,741	12,741
TOTAL PROPERTY TAX REVENUE	3,646,473	3,588,481	3,840,875	3,720,252	3,995,745
4210 State Grants	137,879	120,000	133,546	75,000	75,000
4220 Federal Grants	0	0	0	0	0
4230 Other Grants	1,000	2,500	1,000	2,500	2,500
TOTAL GRANTS REVENUE	138,879	122,500	134,546	77,500	77,500
4310 Fines & Fees	18,607	15,249	23,331	15,326	15,326
4320 Passports/Passport Photos	299,660	227,775	217,764	239,163	185,099
4340 Meeting Room/OLE Rental	3,055	2,115	5,400	1,904	7,000
4350 Test Proctor	0	0	0	0	0
TOTAL SERVICE REVENUE	321,322	245,139	246,495	256,393	207,425
4410 PLFF Grants	34,801	48,000	47,919	40,000	67,969
4430 Misc. Revenue	1,510	0	11,763	0	0
4500 IMPACT FEES	219,545	131,044	130,172	270,746	270,746
4600 INTEREST	132,814	134,883	58,899	138,255	112,899
TOTAL REVENUE	4,495,345	4,270,047	4,470,669	4,503,146	4,732,284
OPERATING BUDGET (minus impact fees & interest)	4,141,476	4,004,120	4,269,835	4,094,145	4,348,639

PLACENTIA LIBRARY DISTRICT**Proposed Expenditures Budget for Fund 707 for Fiscal Year 2026-2027**

OBJECT		2024-2025	2025-2026	2025-2026	2026-2027	2026-2027
CODE	DESCRIPTION	ACTUAL	ADOPTED	PROJECTED	ADOPTED	AMENDED
	5010 Salaries & Wages	1,846,126	1,797,881	1,734,832	1,889,084	2,055,307
	5020 Payroll Taxes (SS & MEDICARE)	138,108	137,635	126,039	141,739	157,231
	5030 Retirement (PARS)	70,633	76,751	67,849	80,746	80,772
	5040 Unemployment Insurance	0	0	0	0	0
	5050 Health Insurance	337,581	342,257	361,395	359,370	378,463
	5060 Life Insurance	4,579	5,412	4,289	5,547	6,102
	5064 Dental Insurance	10,986	14,563	10,359	15,437	24,059
	5066 Long Term Disability Insurance	5,755	7,088	5,611	7,442	7,442
	5068 Vision Insurance	2,434	2,651	2,332	2,784	3,062
	5070 Workers Compensation	20,768	22,845	9,000	25,129	18,000
	5090 Education Assistance	0	2,500	0	2,500	5,000
	TOTAL SALARIES & EMPLOYEE BENEFITS	2,436,971	2,409,583	2,321,706	2,529,778	2,735,438
	5099 Liability Insurance	79,022	83,352	72,819	87,520	87,520
	5100 Communications	25,430	41,521	4,609	43,597	7,000
5150, 5170, 5180	Household Expense & Cleaning Supplies	77,446	87,142	82,643	95,856	90,907
	5160 Refuse Disposal	4,791	5,271	4,723	6,325	6,325
	5205 Maintenance - Equipment	13,046	16,190	16,513	17,808	17,808
5220-5280	Maintenance - Building & Grounds	253,571	317,417	123,928	279,895	223,928
	5290 Memberships	11,333	12,378	12,435	13,615	14,116
5300-5350	Office Supply & Postage	117,893	168,891	145,672	168,627	130,000
5400-5480	Professional / Specialized Services	264,391	320,997	282,563	337,047	275,000
	5490 Loan Obligation (ibank)	73,584	75,645	73,448	77,233	77,233
5495, 5910, 5920	Programs	58,476	50,000	50,000	45,000	55,000
	5499 Technology					146,750
	5500 Book/Library Materials	322,663	274,000	273,950	275,000	317,948
	5600 Travel & Meetings	46,885	40,000	42,834	23,000	25,000
	5700 Mileage/Parking	1,421	1,962	1,114	2,003	2,500
	5800 Utilities	86,637	105,525	82,619	116,078	107,405
	5900 Bookmobile - Vehicle	138,391	350,000	199,510	0	10,000
	5901 Bookmobile - Collection	48,461	0	0	0	5,000
	5902 Bookmobile - Supplies & Materials	0	2,000	453	0	3,000
	5903 Bookmobile - Other	569	2,000	2,862	0	0
	6000 Other (OLE)	644,412	5,000	1,526	0	0
	6100 Taxes & Assessments	9,793	10,249	9,961	10,761	10,761
	TOTAL SUPPLIES & SERVICES	2,278,215	1,969,540	1,484,183	1,599,365	1,613,201
	TOTAL EXPENSES	4,715,185	4,379,123	3,805,889	4,129,143	4,348,639

PLACENTIA LIBRARY DISTRICT
PROPOSED SALARY SCALE FOR FISCAL YEAR 2026-2027
NON-EXEMPT

	1	2	3	4	5	6	7	8	9	10
LIBRARY PAGE	HR	17.77	18.21	18.67	19.14	19.61	20.11	20.61	21.12	21.65
	AN	36,961.60	37,885.64	38,832.78	39,803.60	40,798.69	41,818.66	42,864.12	43,935.73	45,034.12
	MO	3,080.13	3,157.14	3,236.07	3,316.97	3,399.89	3,484.89	3,572.01	3,661.31	3,752.84
ACCOUNTING INTERN TEMPORARY PART-TIME	HR	18.00	18.45	18.91	19.38	19.87	20.37	20.87	21.40	21.93
	AN									
	MO									
LIBRARY CLERK PASSPORT AGENT	HR	22.45	23.01	23.59	24.18	24.78	25.40	26.04	26.69	27.35
	AN	37,440.00	38,376.00	39,335.40	40,318.79	41,326.75	42,359.92	43,418.92	44,504.39	45,617.00
	MO	3,120.00	1,875.47	1,922.27	1,970.80	2,019.33	3,529.99	3,618.24	3,708.70	3,801.42
EXECUTIVE ASSISTANT (CONFIDENTIAL)	HR	29.46	30.20	30.95	31.73	32.52	33.33	34.16	35.02	35.89
	AN	61,276.80	62,808.72	64,378.94	65,988.41	67,638.12	69,329.07	71,062.30	72,838.86	74,659.83
	MO	5,106.40	5,234.06	5,364.91	5,499.03	5,636.51	5,777.42	5,921.86	6,069.90	6,221.65
LIBRARY ASSISTANT	HR	29.89	30.64	31.40	32.19	32.99	33.82	34.66	35.53	36.42
	AN	62,171.20	63,725.48	65,318.62	66,951.58	68,625.37	70,341.01	72,099.53	73,902.02	75,749.57
	MO	5,180.93	5,310.46	5,443.22	5,579.30	5,718.78	5,861.75	6,008.29	6,158.50	6,312.46
MARKETING/COMMUNICATIONS SPECIALIST	HR	30.63	31.40	32.18	32.99	33.81	34.66	35.52	36.41	37.32
	AN	63,710.40	65,303.16	66,935.74	68,609.13	70,324.36	72,082.47	73,884.53	75,731.64	77,624.94
	MO	5,309.20	5,441.93	5,577.98	5,717.43	5,860.36	6,006.87	6,157.04	6,310.97	6,468.74
LIBRARIAN I	HR	35.90	36.80	37.72	38.66	39.63	40.62	41.63	42.67	43.74
	AN	74,672.00	76,538.80	78,452.27	80,413.58	82,423.92	84,484.51	86,596.63	88,761.54	90,980.58
	MO	6,222.67	6,378.23	6,537.69	6,701.13	6,868.66	7,040.38	7,216.39	7,396.80	7,581.72
SUPERVISING LIBRARIAN	HR	41.63	42.67	43.74	44.83	45.95	47.10	48.28	49.48	50.72
	AN	86,590.40	88,755.16	90,974.04	93,248.39	95,579.60	97,969.09	100,418.32	102,928.77	105,501.99
	MO	7,215.87	7,396.26	7,581.17	7,770.70	7,964.97	8,164.09	8,368.19	8,577.40	8,791.83

Signature _____ : Approved _____ Effective: July 1, 2026 _____

Gayle Carline, Board President

PLACENTIA LIBRARY DISTRICT
PROPOSED SALARY SCALE FOR FISCAL YEAR 2026-2027
EXEMPT

	1	2	3	4	5	6	7	8	9	10
LIBRARY DIRECTOR										
HR	110.84									
AN	230,547									
MO	19,212.00									
ASSISTANT LIBRARY DIRECTOR										
HR	72.61	74.43	76.29	78.19	80.15	82.15	84.21	86.31	88.47	92.89
AN	151,028.80	154,804.52	158,674.63	162,641.50	166,707.54	170,875.22	175,147.11	179,525.78	184,013.93	193,214.62
MO	12,585.73	12,900.38	13,222.89	13,553.46	13,892.29	14,239.60	14,595.59	14,960.48	15,334.49	16,101.22
TECHNOLOGY MANAGER										
HR	50.48	51.74	53.04	54.36	55.72	57.11	58.54	60.00	61.50	64.58
AN	104,998.40	107,623.36	110,313.94	113,071.79	115,898.59	118,796.05	121,765.95	124,810.10	127,930.35	134,326.87
MO	8,749.87	8,968.61	9,192.83	9,422.65	9,658.22	9,899.67	10,147.16	10,400.84	10,660.86	11,193.91
BUSINESS MANAGER										
HR	43.30	44.38	45.49	46.63	47.80	48.99	50.21	51.47	52.76	55.39
AN	90,064.00	92,315.60	94,623.49	96,989.08	99,413.80	101,899.15	104,446.63	107,057.79	109,734.24	115,220.95
MO	7,505.33	7,692.97	7,885.29	8,082.42	8,284.48	8,491.60	8,703.89	8,921.48	9,144.52	9,601.75

Signature _____ : Approved _____

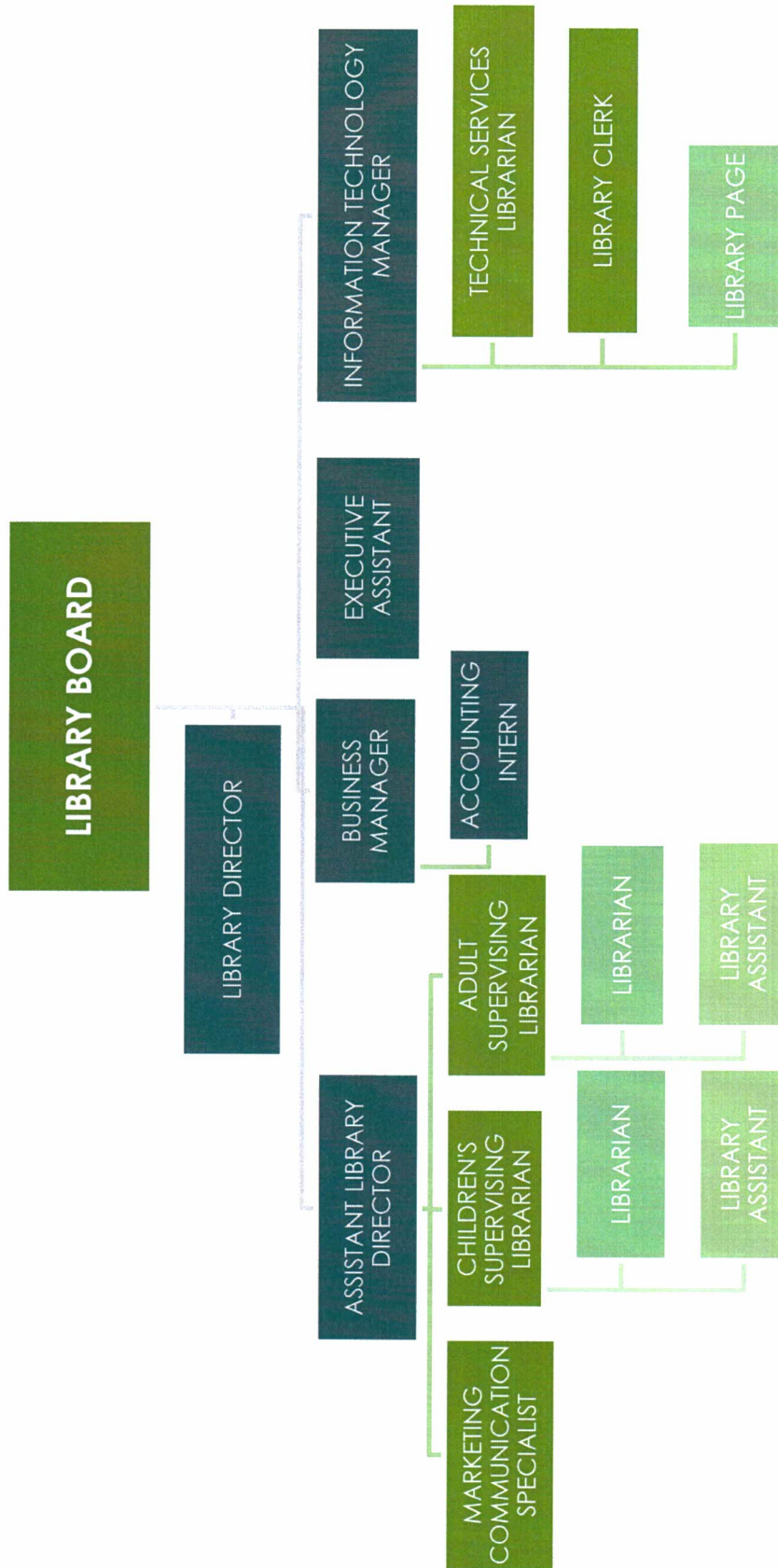
Gayle Carline, Board President

Effective: July 1, 2026



PLACENTIA LIBRARY DISTRICT

ORGANIZATIONAL CHART
FISCAL YEAR 2026-2027



Placentia Library District

POLICY MANUAL

POLICY TITLE: Job Description – Accounting Intern
POLICY NUMBER: 2311

2311.1 The Accounting Intern is a confidential classification under the general direction of the Business Manager. Works directly with the Business Manager. Performs a wide variety of highly responsible, confidential, complex, and varied accounting support the Placentia Library District.

The primary responsibility of the Accounting Intern is to support the accounting and financial work of the District and to ensure efficient service for its staff. Responsibilities require tact, discretion, diplomacy, initiative and independent judgement, as well as knowledge of District activities and a strong ability to implement District administrative policies.

Typical Tasks

- 2311.1.1** Assist with month-end journal entries to ensure timely financial reporting.
- 2311.1.2** Support the preparation of monthly and annual financial reports.
- 2311.1.3** Assist with account reconciliations.
- 2311.1.4** Analyze financial data and identify discrepancies or variances.
- 2311.1.5** Help with audit preparation and ensure compliance with internal controls.
- 2311.1.6** Gain exposure to funds, grants, and government accounting.
- 2311.1.7** Contribute to administrative tasks, including document retention.

2311.2 Required Qualifications. Currently enrolled in an accredited college, university, or community college with at least sophomore standing or recent completion of a bachelor's degree in the previous six (6) months. A major or degree in accounting, finance, business administration or a closely related field is required to be considered.

2311.3 Knowledge, Skills, and Abilities:

- 2311.3.1** Basic understanding of government accounting principles (GASB preferred).
- 2311.3.2** Familiarity with government financial statements such as Statement of Net Position, Statement of Activities, Fund Balance, etc.

- 2311.3.3** Understanding of budgetary processes in public agencies, including appropriations, encumbrances, and expenditure tracking.
- 2311.3.4** Knowledge of internal controls, public-sector financial reporting, and audit requirements.
- 2311.3.5** Awareness of procurement processes, grant management, and compliance rules.
- 2311.3.6** Proficiency in Word, Excel, Outlook, and QuickBooks.
- 2311.3.7** Accurate data entry and financial recordkeeping.
- 2311.3.8** Ability to prepare and review financial documents for accuracy and compliance with government regulations.
- 2311.3.9** Strong analytical skills for reviewing budgets, variances, and expenditure reports
- 2311.3.10** Clear, effective communication skills for working with internal departments, vendors, auditors, and the public.
- 2311.3.11** Strong organizational and time-management skills, especially when working with structured deadlines.
- 2311.3.12** Ability to interpret and apply governmental accounting policies, procedures, and regulations.
- 2311.3.13** Ability to maintain confidentiality of sensitive financial information.
- 2311.3.14** Ability to work collaboratively with supervisors and team members in a compliance-focused environment.
- 2311.3.15** Ability to adapt to procedural changes, audit requests, and reporting cycles.
- 2311.3.16** Ability to identify irregularities or discrepancies in financial data and take appropriate follow-up action.
- 2311.3.17** Ability to learn government-specific accounting software and reporting tools quickly.

2311.4 Physical Demands:

2311.4.1 The physical demands described here are representative of those that must be met by an employee to successfully perform the typical tasks of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the typical tasks.

- 2311.4.1.1** Must possess mobility to work in a standard office setting and to visit meeting sites.
- 2311.4.1.2** Must possess hearing and speech to communicate in person, before groups and over the telephone.
- 2311.4.1.3** The employee is required to sit; use hands to finger, handle, or feel objects; twist and reach with hands and arms.
- 2311.4.1.4** The employee is required to stand; walk; and stoop, kneel, or crouch.
- 2311.4.1.5** The employee must be able to push or pull carts weighing up to 25 pounds and have the strength to pick up and carry supplies weighing up to twenty pounds.
- 2311.4.1.6** The employee must be able to see to perform data entry. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus.

2311.5 Work Environment:

- 2311.5.1** The work environment characteristics described here are representative of those an employee encounters while performing the typical tasks of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the typical tasks.
- 2311.5.2** Most work is performed in an office setting, although there may be occasional exposure to inclement weather conditions, noise, dust and potentially hazardous materials.

Proposed Technology Budget 2026-2027

Operating Expenses

#	Code	Item	Department	Vendor	Amount	Bill Cycle	License begin	License End	URL
1	5405	ILS, OPAC, Enterprise	Circulation	SirsiDynix	\$ 25,735.81	Annually	9/1/2025	31-Aug-26	sirsidyndix.com
2		Avast Cloud Antivirus x60	IT	TechSoup/Avast	\$ 480.00	Annually	6/28/2024	6/27/2025	AVG.com
3		Avast Cloud Patch Management x60	IT	TechSoup/Avast	\$ 1,200.00	Annually	1/27/2025	1/26/2026	AVG.com
4		Ninja RMM/ AV/ PM x10	IT	Ninja	\$ 984.00	Annually	TBD		Ninjaone.com
5		Biblioteka Support	Circulation	Biblioteka	\$ 4,979.90	Annually	9/1/2024	8/31/2025	https://www.biblioteka.com/
6		B2 Cloud Backup	IT	Backblaze	\$ 2,500.00	Annually	Monthly	Monthly	backblaze.com
7		Arq backup client license	IT	Arq backup	\$ 40.00	Annually	1/8/2025	1/8/2026	arqbackup.com
8		Sonicwall Licenses	IT	Sonicwall	\$ -	Annually	Annually	Annually	sonicwall.com
9	5500	miradoreIOS MDM	Childrens/Lots	miradore	\$ 600.00	Annually	7/15/2024	7/15/2025	miradore.com
10	5100	Zoom Meetings	Admin	Zoom	\$ 200.00	Annually	1/6/2024	1/5/2025	zoom.com
11	5100	Webhosting	IT	Streamline/CivicPlus	\$ 4,500.00	Annually	1/24/2025	1/21/2026	streamline.com
12		Document Accessibility Processing	IT	DocAccess	\$ 3,800.00		TBD		
13		Mobile App hosting	Circulation	Solus	\$ 4,500.00	Annually			sol.us
14		Solus EB1	Circulation	Solus	\$ 4,500.00	Annually	TBD		sol.us
15		LibInsights, LibStaffer	Admin	Springshare	\$ 4,138.00	Annually	TBD		https://www.springshare.com/
16		LibConnect Pro/w Premium Notices	Circulation	Springshare	\$ 5,500.00	Annually	TBD		https://www.springshare.com/
17		LibConnect Pro/w Premium Setup	Circulation	Springshare	\$ 2,500.00	One Time	TBD		https://www.springshare.com/
18		Mobile Print Service	IT	Envisionware	\$ 725.00	Annually	11/30/2022	11/30/2026	envisionware.com
19		LPT/PC-Res/ Coin Machines, E-Com/ STS	IT/Admin	Envisionware	\$ 2,202.19	Annually	9/30/2022	9/30/2026	envisionware.com
20		ScribeHow	Admin	ScribeHow	\$ 780.00	Annually	TBD		ScribeHow.ai
21		Sting Box Network security	IT	Stingbox	\$ 250.00	Annually	TBD		Stingbox.com
22		Cradlepoint License	Bookmobile	Cradlepoint	\$ 450.00	Annually	9/20/2025	9/20/2026	https://cradlepoint.com/
23		Cell Phone Service (Bookmobile & IT Mngr)	Admin	Verizon	\$ 960.00	Annually	TBD		vzw.com
24		Cell Phone IT Manager		Verizon	\$ 978.74	One Time	TBD		vzw.com
25	5342	IT Support Staff	IT	Eagle Multi Media	\$ 16,500.00	1 Month	1/1/2024	12/31/2026	eaglemmp.com
26	5800	Domain Name Services	IT	Network Solutions	\$ 194.94	11	8/3/2022	8/3/2027	networksolutions.com
27		Calendly Calendar subscription	Passports	Calendly	\$ -	Annually	5/12/2022	5/12/2026	calendly.com
28		Microsoft Office 365 Subscription- GCC3/ GC5	IT	Microsoft	\$ 17,000.00	Annually	Monthly	Monthly	office365.com
29		Google Enterprise	IT	Google	\$ 700.00	Annually	5/1/2026	5/1/2027	admin.google.com
30		SMTP2Go	Circulation	SMTP2GO	\$ 150.00	Annually			https://www.smtp2go.com/
31		Password Manager	IT	Lastpass	\$ 1,200.00	Annually	9/26/2025	9/26/2026	lastpass.com
32		Printer Services	Admin	Legacy	\$ 11,000.00	Annually	Monthly	Monthly	legacyis.com
33	5800	Calnet2	Admin	AT&T	\$3,000.00	Annually	Monthly	Monthly	https://cenic.org/
34		Misc. IT supplies and expendibles	IT	Amazon	\$5,000.00	Annually			amazon.com
					OpEx Year 2				
					\$ 127,248.58				

One-Time Equipment- CAPEX

8		Staff Hardware Upgrades x18 (9-25/ 9-26)	IT	Dell	\$ 10,000.00
9		Network Upgrades	IT	E-Rate Match	\$ 4,000.00
10		Domain Transfer to ca.gov	IT	Avocan	\$ -
11		Quick Access Terminals (catalog, print) x6	Circulation	Dell	\$ -
12		Upgrade CCTV Cameras, Bookmobile, Info Desk	Admin	TBD	\$ 3,500.00
6		Technology Manager Laptop	IT	Dell	\$ 2,000.00
					CapEx
					\$ 19,500.00
					Grand Total
					\$ 146,748.58

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Discuss date for August Board meeting due to a schedule conflict with the California Special District Association Conference.

DATE: June 22, 2026

BACKGROUND

The Board of Trustees customarily conducts its regular meetings on the fourth Monday of each month. The regularly scheduled August 2026 Board Meeting falls during the same week as the California Special Districts Association (CSDA) Annual Conference.

To ensure adequate trustee participation and avoid scheduling conflicts, staff has identified the following potential alternative meeting dates:

- Wednesday, August 19, 2026
- Monday, August 31, 2026

Each of the proposed dates would allow the District to conduct its regular business while minimizing conflicts associated with conference attendance.

RECOMMENDATION

Discuss and select an alternate date for the August Board meeting.



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Election for California Special Districts Association (CSDA) Board of Directors – Southern Network Seat C, 2027-2029 Term.

DATE: June 22, 2026

BACKGROUND

The California Special Districts Association (CSDA) has opened elections for the Board of Directors Seat C in each of its six statewide networks for the 2027–2029 term. CSDA serves as the statewide association representing California's independent special districts and provides legislative advocacy, professional development, governance training, insurance programs, financing resources, and operational support to member agencies throughout California.

The CSDA Board of Directors is responsible for establishing policy direction, overseeing association governance, guiding legislative priorities, and ensuring that CSDA continues to effectively represent the interests of special districts before the Legislature and state agencies. Board members serve as representatives of their respective geographic networks while advancing the interests of California special districts as a whole.

The Placentia Library District is a member agency within CSDA's Southern Network and is eligible to vote for one of the four candidates below:

- Nikki Winslow, District Director, Altadena Library District (Incumbent)
- Jason Dafforn, General Manager, Valley Sanitary District
- John Horst, Director, Trabuco Canyon Water District
- Melinda Sedmak, Trustee, Twentynine Palms Public Cemetery District

The candidate information sheet and statements are attached.

RECOMMENDATIONS

1. Select a candidate to serve on CSDA's Board of Directors Southern Network, Seat C for the 2027-2029 term; and,
2. Authorize the Library Director to submit the ballot on behalf of the Placentia Library District; and,
3. A roll call vote.



**California Special
Districts Association**

Districts Stronger Together

2027-2029 TERM - CSDA BOARD CANDIDATE INFORMATION SHEET

The following information **MUST** accompany your nomination form and Resolution/minute order:

Name: Nikki Winslow

District/Company: Altadena Library District

Title: District Director

Elected/Appointed/Staff: Staff

Length of Service with District: 6 years

1. Do you have current involvement with CSDA (such as committees, events, workshops, conferences, Governance Academy, etc.):

General Managers Summit 2020-2025; San Gabriel Chapter Formation Committee 2024; San Gabriel Chapter Board Vice-Chair 2025;

Legislative Day 2025; Annual Conference 2025; CSDA Board Southern Network Seat C Nov 2025-present

2. What other state-wide associations have you been involved with? (such as CSAC, ACWA, League, etc.):

California Library Association; CALPELRA; American Library Association;

Public Library Association

3. List your local government involvement (such as LAFCo, Association of Governments, etc.):

Altadena Town Council, LAFCo

4. List your involvement in civic and/or non-profit organization:

Rotary Club of Altadena; Altadena Chamber of Commerce;

Altadena Heritage; Eaton Fire Collaborative

****Candidate Statement – Although it is not required, each candidate is requested to submit a candidate statement of no more than 300 words in length. Any statements received in the CSDA office after the nomination deadlines will not be included with the ballot.**

2027-2029 CSDA Board Appointment – Seat C Southern Network

Candidate Statement – Nikki Winslow

I am honored to put myself forward as a candidate for the CSDA Board for the 2027-2029 term. Since my appointment to the seat in January 2026, I've familiarized myself further with CSDA Board operations and the incredible individuals who volunteer their time to advocate for the work that special districts accomplish. Being part of this team is inspiring, and I look forward to serving and representing my region on the Board for the 2027-2029 term. I believe deeply in the mission of special districts and the staff and leadership upholding this work. They provide libraries, parks, water, fire protection, vector control – and so many other vital services. Special districts are essential in strengthening California's communities, often serving as a critical connection and filling in gaps for services that would otherwise be unavailable. It is my goal to continue to advocate for policies that support sustainability, innovation, and equity for all districts across our state, and represent the interests of the Southern Seat C region on the Board.

For 6 years I have served as District Director of the Altadena Library District. In this role, I have been proud to guide our community through a period of both tremendous growth and significant challenges. Among my achievements, I successfully led the passage of a ballot measure that secured long-term, sustainable funding for our libraries, a feat accomplished in the first year of the 2020 pandemic. I oversaw the planning of our two major renovations and the reopening of our branch on the westside of Altadena in August 2025. In February of this year, our Main library closed and long-awaited renovation work will finally begin on this property. These projects ensure that our library spaces are welcoming, modern, and adaptable to community needs. And throughout 2025 I helped guide the District and our residents through the devastation of the Eaton Fire, leading recovery and rebuilding efforts while ensuring our library remained a place of connection and resilience during a time of crisis and uncertainty.

Prior to my work in Altadena, I served as Assistant Director of Glendale Library, Arts & Culture and, before that, spent nearly 15 years with the Las Vegas-Clark County Library District, where I gained deep experience in operations, branch management, and community partnership building. My educational background includes a Bachelor's in Political Science from UNLV, a Master's in Library and Information Science from the University of North Texas, and a Master's in Public Administration from Claremont Lincoln University. This academic foundation, paired with over

two decades of professional leadership, has shaped my approach to governance—one grounded in strategic leadership, ethical decision-making, and a commitment to inclusive community engagement.

Throughout my career, I have worked with diverse populations and developed programming that directly meets the needs of my community. I have helped launch ESL and citizenship training programs for new Americans, championed the expansion of digital resources, and created equitable access to services for patrons of all ages and backgrounds. In Altadena, I have also been intentional about mentoring and empowering the next generation of library leaders. I am very passionate about professional development, and look forward to advocating for uplifting aspiring leaders in our special districts.

I want to continue to serve on the CSDA Board and spotlight how special districts meet challenges where larger government agencies sometimes cannot— with adaptability and innovation built-in to their structure. Advocating for these institutions is critical in meeting the needs of our California communities and solving problems that sometimes seem impossible. I believe my experiences navigating ballot measures, leading through emergencies, and building strong community partnerships add value to the Board's work. I especially believe my perspective as a library district leader—representing a sector that touches education, workforce development, equity, and civic engagement— is critical to the future of California's social infrastructure.

My involvement with CSDA is not just within my District or on the Board, but also as leadership in my local CSDA Chapter. I currently serve as Vice-Chair of the Special District Association of San Gabriel Valley Chapter Board, and was one of its founding members. In January 2024, I was invited to participate in a meeting to explore the formation of a new CSDA chapter in the San Gabriel Valley. At the group's follow-up meeting in May 2024, I volunteered to serve on the formation committee, which successfully launched the chapter in October 2024... I was honored to host one of our chapter meetings at the Altadena Main Library, featuring Supervisor Kathryn Barger as our invited speaker in September 2025. We recently hosted a chapter mixer to encourage our special district staff and elected officials to meet, network and learn about the vital work our districts provide to fulfill the diverse needs and priorities of residents across our region.

It would be a privilege to serve a full term alongside other committed leaders on the CSDA Board for the 2027-2029 term, advocating for the sustainability of our districts, supporting collaboration across sectors, and ensuring that all voices—large, small, urban, and rural—are represented in statewide conversations. I am ready to bring my passion, experience, and vision to this role, and I would be honored to earn your support.

Sincerely,

Nikki Winslow

District Director, Altadena Library District



**California Special
Districts Association**

Districts Stronger Together

2027-2029 TERM - CSDA BOARD CANDIDATE INFORMATION SHEET

The following information **MUST** accompany your nomination form and Resolution/minute order:

Name: Jason Dafforn

District/Company: Valley Sanitary District

Title: General Manager

Elected/Appointed/Staff: Staff

Length of Service with District: 2.75 years

1. Do you have current involvement with CSDA (such as committees, events, workshops, conferences, Governance Academy, etc.):

Attend CSDA Conferences, Leadership Academy, GM Summit, CSDA Legislative Days

2. What other state-wide associations have you been involved with? (such as CSAC, ACWA, League, etc.):

ACWA, CASA, NACWA

3. List your local government involvement (such as LAFCo, Association of Governments, etc.):

Collaborate with Riverside LAFCO, Coachella Valley Association of Governments (CVAG)

4. List your involvement in civic and/or non-profit organization:

Desert Recreation Foundation Board of Directors

****Candidate Statement – Although it is not required, each candidate is requested to submit a candidate statement of no more than 300 words in length. Any statements received in the CSDA office after the nomination deadlines will not be included with the ballot.**

Candidate Statement

My name is Jason Dafforn, and I am honored to be a candidate for the CSDA Board of Directors representing the Southern Network, including Los Angeles, Orange, San Diego, San Bernardino, Riverside, and Imperial counties.

I am a Licensed Civil Engineer with more than 30 years of experience in the water and wastewater industry, including 17 years as a utility manager for California local governments and more than 10 years serving special districts. I currently serve as General Manager of Valley Sanitary District in Indio, California.

Throughout my career, I have focused on strengthening essential public infrastructure, improving organizational performance, and leading teams to deliver practical, long-term solutions. I have a deep appreciation for the diversity of special districts and the critical services they provide, including water, wastewater, parks and recreation, fire protection, libraries, healthcare, and community services.

Additionally, I have actively represented special district interests through legislative advocacy, participating in multiple policy and legislative trips to Sacramento and Washington, D.C. over the past several years. These efforts have focused on engaging directly with state and federal policymakers to advance the needs and priorities of special districts across California.

I also serve on the Board of Directors of the Desert Recreation Foundation, a nonprofit organization supporting the Desert Recreation District, where we help expand access to quality recreational programs and facilities throughout the Coachella Valley. The Foundation was recently awarded the 2026 California Nonprofit of the Year for Senate District 18.

If elected, I will bring a strategic, pragmatic perspective to the CSDA Board of Directors and work collaboratively to ensure CSDA remains a strong, effective advocate and resource for its members. Together, we can continue to strengthen special districts and the communities they serve.

Thank you for your support.

Jason Dafforn, PE
General Manager, Valley Sanitary District



California Special
Districts Association
Districts Stronger Together

2027-2029 TERM - CSDA BOARD CANDIDATE INFORMATION SHEET

The following information **MUST** accompany your nomination form and Resolution/minute order:

Name: John Horst

District/Company: TCWD

Title: Director

Elected/Appointed/Staff: _____

Length of Service with District: 1 1/2 yrs

1. Do you have current involvement with CSDA (such as committees, events, workshops, conferences, Governance Academy, etc.):

Not at this time. I am assigned as a board representative but have not been given permission to attend yet.

2. What other state-wide associations have you been involved with? (such as CSAC, ACWA, League, etc.):

ACWA

3. List your local government involvement (such as LAFCo, Association of Governments, etc.):

None at this time

4. List your involvement in civic and/or non-profit organization:

SCRA, TCWD

****Candidate Statement – Although it is not required, each candidate is requested to submit a candidate statement of no more than 300 words in length. Any statements received in the CSDA office after the nomination deadlines will not be included with the ballot.**

Candidate Statement – John Horst

My name is John Horst, and I'm running as a candidate for the California Special Districts Association in the Southern Network.

I am proud to stand as a candidate committed to strengthening the vital role special districts play in serving our communities. Special districts are the backbone of local government—providing essential services like water, fire protection, sanitation, and infrastructure that directly impact our daily lives. Across California, these districts are trusted, community-driven, and accountable to the people they serve.

As a current Director of the Trabuco Canyon Water District, I have focused on protecting taxpayer dollars, improving transparency, and ensuring reliable, high-quality water services. I serve on the Finance and Audit Committee, helping maintain fiscal discipline, and I chair the Outreach Committee to improve communication, so residents stay informed and engaged.

My background in business and operations shapes how I approach public service. I've built my career solving problems, improving efficiency, reducing costs, and strengthening organizations from within. I understand how to manage budgets, support teams, and make decisions that lead to long-term stability and success.

I'm not a career politician—I bring entrepreneurial experience, a strong work ethic, and a commitment to results. I ask tough questions, seek practical solutions, and stay focused on what matters most: serving our community responsibly.

I respectfully ask for your vote.



2027-2029 TERM - CSDA BOARD CANDIDATE INFORMATION SHEET

The following information **MUST** accompany your nomination form and Resolution/minute order:

Name: Melinda Sedmak
District/Company: 29 Palms Public Cemetery District
Title: Trustee
Elected/Appointed/Staff: Appointed
Length of Service with District: 1 year

1. Do you have current involvement with CSDA (such as committees, events, workshops, conferences, Governance Academy, etc.):

I am actively engaged with CSDA through participation in member discussions, governance resources, and ongoing professional development focused on special district operations and best practices. My current and planned involvement includes:

- Participation in CSDA member forums addressing small and rural district challenges, including records management and operational efficiency
- Continued use of CSDA governance resources and training materials to support board effectiveness
- Planned attendance at the Special District Leadership Academy, San Diego, May 11–14, 2026
- Commitment to complete all four modules, and 10 continuing education hours to earn the Certificate in Special District Governance

2. What other state-wide associations have you been involved with? (such as CSAC, ACWA, League, etc.):

- California Notary Public
- California Teachers Association (CTA)
- National Association of Legal Assistants (NALA)
- Phi Theta Kappa (PTK) - Southwest Regional Vice President of Nevada/California Region of Phi

3. List your local government involvement (such as LAFCo, Association of Governments, etc.):

I currently serve as a Trustee for the Twentynine Palms Public Cemetery District, where I participate in governance, policy oversight, and the responsible stewardship of public resources. My role includes supporting compliance with applicable laws, contributing to long-term planning, and ensuring operational sustainability within a small, rural district. I also actively engage in local government and community leadership efforts within San Bernardino County, with a focus on transparency, collaboration, and effective service delivery.

4. List your involvement in civic and/or non-profit organization:

My civic and community involvement reflects a commitment to public service, election integrity, and community outreach:

- Poll Worker Supervisor, Twentynine Palms, (3 years)
- Deputy Registrar, State of Arizona (6 years)
- Notary Public, California (3 years)
- Notary Public, Arizona (6 years)
- Precinct Captain for Political Committeemen, Arizona Legislative District 23 (4 years)
- “Hope Responder,” Hope Response, Inc. (Non-Profit-501c3) supporting outreach to immigrant communities & disaster response efforts across California/Arizona (10 years)
- Member, Business Network International (BNI), Hi-Desert, focused on professional collaboration & local business development (3 years)
- Volunteer, Inspiration’s Edge and Theatre 29, Twentynine Palms, supporting community events & engagement (2026)

Candidate Statement for Melinda Sedmak

Special districts serve as the foundation of local governance, providing essential services that directly impact the daily lives of the communities they serve. As a Trustee for the Twentynine Palms Public Cemetery District, I have developed a strong commitment to responsible governance, transparency, and the stewardship of public resources, particularly within a small, rural district that faces unique operational and financial challenges.

Cemetery districts represent a distinct and often underrepresented sector within special districts. These districts carry a profound public trust, preserving history, honoring families, and maintaining spaces of lasting community significance. At the same time, rural districts in the High Desert and Inland Empire regions frequently operate with limited resources and minimal representation at the statewide level. I am committed to ensuring that these voices are included in broader discussions affecting special districts across California.

My professional background as a managing paralegal in estate planning, trusts, and probate has provided me with a strong foundation in legal compliance, fiduciary responsibility, and long-term planning. Combined with my experience in civic leadership and election oversight, I bring a perspective grounded in accountability, structure, and public service.

I am actively engaged with CSDA resources and intend to attend the Special District Leadership Academy in San Diego in May 2026 to complete all four governance modules and work toward earning the Certificate in Special District Governance. I am prepared to commit the time and effort required to fulfill the responsibilities of serving on the CSDA Board of Directors, including participation in meetings, committees, and statewide initiatives.

I respectfully seek the opportunity to represent the Southern Network and to contribute a thoughtful, balanced perspective that supports all special districts, particularly those in rural and underserved regions.



PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Legislative Updates from Trustee Nelson.

DATE: June 22, 2026

BACKGROUND

Trustee Nelson will provide an update on legislative activities.

Attachment A is the California Special District Association (CSDA) May-June 2026 Take Action Brief.

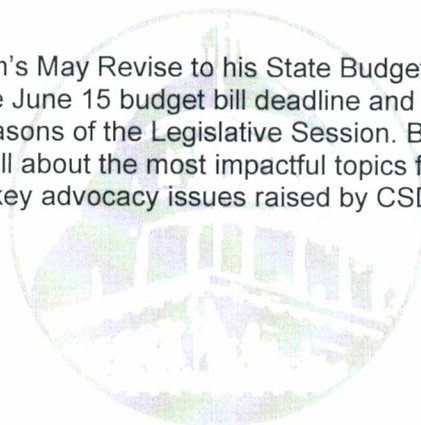


CALIFORNIA SPECIAL DISTRICTS ASSOCIATION PRIORITIES

TAKE ACTION BRIEF

May/June 2026

Between Governor Gavin Newsom's May Revise to his State Budget proposal and the May 29 house of origin bill deadline, followed by the June 15 budget bill deadline and July 2 policy committee deadline, this is one of the most action-packed seasons of the Legislative Session. Buckle up and open up this edition of the CSDA Take Action Brief to learn all about the most impactful topics facing special districts in the Capitol, including some early wins on the key advocacy issues raised by CSDA members at Special Districts Legislative Days in April!



Inside this edition of the Take Action Brief:

Feedback Needed on Governor's Development Related Fees Budget Trailer Bill.....	2
Examples Requested for Revived Information Practices Act (IPA) Mandate Bill.....	3
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Contact a local CSDA representative near you!

Chris Norden
Dane Wadlé
Colleen Haley
Erasmov Viveros
Richelle Noroyan
Chris Palmer

Northern Network
Sierra Network
Bay Area Network
Central Network
Coastal Network
Southern Network

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CALIFORNIA SPECIAL DISTRICTS ASSOCIATION PRIORITIES

TAKE ACTION BRIEF

Feedback Needed on Governor's Development Related Fees Budget Trailer Bill

The Governor's 2026 May Revision proposes statutory changes aimed at reducing state costs related to state subsidized affordable housing projects. The [development impact fee budget trailer bill proposal](#) would pressure local governments to waive development related fees on state affordable housing programs. It would also bar local governments, when acting as a lead applicant or co-applicant on certain housing projects receiving state funding, from charging development impact fees on those projects as a condition of receiving state funding.

LOWERING COSTS TO BUILD HOUSING
MORE HOUSING. LESS RED TAPE. LOWER COSTS.

SLASHING IMPACT FEES

- ✓ Stop local impact fees on affordable housing projects
- ✓ Incentivize fee waivers and cost reductions
- ✓ Cut costs to build affordable housing by at least \$10,000
- ✓ Saves hundreds of millions annually

CAPTION: Slide presented by Governor Gavin Newsom at May 14, 2026 May Revise Press Conference in Sacramento.

Take Action: Share input on proposed development impact fee State Budget Trailer Bill

As CSDA continues to analyze the Governor's development impact fee proposal closely, members with input on the proposal and its potential impacts on special districts are encouraged to contact CSDA Legislative Representative Anthony Tannehill at anthonyt@csla.net.

Development related fees fund the very infrastructure necessary to provide affordable essential services. Reducing access to such fees results in costs shifted from developers to existing residents or reduced levels of service needed to protect the health, safety, and wellness of all Californians.

Read the agenda items for this proposed State Budget Trailer Bill as taken up May 20, 2026 in [Assembly Budget Subcommittee No. 5](#) and [Senate Budget Subcommittee No. 4](#), respectively.



CALIFORNIA SPECIAL DISTRICTS ASSOCIATION PRIORITIES

TAKE ACTION BRIEF

Examples Requested for Revived Information Practices Act (IPA) Mandate Bill

Despite having failed passage last year in the Senate Judiciary Committee, a significant mandate bill opposed by CSDA is once again active and moving forward.

Assembly Bill 1337 (Ward) would revise the Information Practices Act of 1977 (IPA), a comprehensive privacy statute that currently only applies to the State, to newly obligate special districts to observe the IPA.

The IPA prescribes various requirements impacting the receipt, retention, and sharing of personal information. In effect, the routine handling of common information (e.g., names, telephone numbers, residential addresses) provided to special districts would become dramatically more resource-intensive, requiring countless ongoing hours of staff time to ensure compliance and exposing districts to additional legal liability. CSDA and a coalition of local government stakeholders opposed the bill last year and continue to do so.

Notably, the operations that would most acutely be impacted by this legislation are those programs that directly benefit the public—these programs rely on personal information sharing among and within various governmental entities, embodying a “no wrong door” approach to making services accessible. CSDA has cited examples like low-income water rate assistance programs (WRAP) and low-income home energy assistance programs (LIHEAP) as examples of district initiatives that utilize personal information sharing that would become sharply inhibited by the passage of AB 1337. Awareness of such initiatives helps demonstrate to policymakers how current privacy practices facilitate increased public access to government programs.

Take Action: Provide examples of privacy practices increasing access to government programs

Districts with additional distinct examples are encouraged to provide them to CSDA Legislative Representative Marcus Detwiler at marcusd@csla.net.

On April 27, 2026, AB 1337 was withdrawn from the Senate Judiciary Committee, where it had fallen one vote short in 2025, and on May 6 it was re-referred to the Senate Committee on Privacy, Digital Technologies, and Consumer Protection.

July 2, 2026 is the last day for policy committees to meet and report bills.



CALIFORNIA SPECIAL DISTRICTS ASSOCIATION PRIORITIES

TAKE ACTION BRIEF

Two Priority Oppose Workplace Tech Bills Defeated Following Advocacy at Legislative Days

The efforts of special district officials attending this year's Special Districts Legislative Days in April paid off last week when the two workplace technology bills opposed during the event's 90 legislative office visits organized by CSDA were held under submission, effectively killing the legislation.

California lawmakers advanced hundreds of bills on May 14, 2026, as the State Senate and Assembly Committees on Appropriations held their respective Suspense File hearings. This is one of the Legislature's key deadlines for determining which measures will continue moving through the legislative process.

During the hearings, leaders of both committees acknowledged the difficult decisions involved in weighing policy priorities against the state's fiscal constraints. In the Assembly, 637 bills were on the Suspense File, with 468 of those bills advancing out of the committee. In the Senate, 332 bills were on the Suspense File, with 242 bills advancing. Bills that were held under submission are dead for this Legislative Session.

CSDA has been a leader advocating on workplace technology issues for the benefit of the communities special districts serve. CSDA and its coalition partners have advocated for preserving flexibility in public agency uses of artificial intelligence (AI), automated decision systems (ADS), surveillance, and other technologies that enable special districts to deliver affordable essential services like water, wastewater, fire protection, resource conservation, healthcare, parks and recreation, and more, while protecting critical infrastructure, and keeping employees and communities safe.

CSDA elevated two priority "Oppose" measures that would have unduly restricted workplace technology and organized 200 special district leaders to advocate directly to their legislators at Special Districts Legislative Days in April. Both measures were held on suspense and defeated for the year:

- [AB 1898 \[Schultz\] Workplace artificial intelligence tools](#)
- [AB 2027 \[Ward\] Worker data: prohibitions: artificial intelligence](#)

CSDA and its coalition partners opposed these measures because they would have placed unreasonable restrictions on workplace technologies such as AI and ADS, and they failed to account for existing protections and unique aspects of the public sector workforce and public sector service delivery.

Despite these early wins, significant work remains before the end of the August 31 close of the 2025-2026 State Legislative Session. CSDA and other stakeholders will continue advocacy on numerous remaining technology measures that passed out of the Senate and Assembly Appropriations Committees, including:

- [SB 947 \(McNerney\) Employment: automated decision systems.](#)
- [SB 951 \(Reyes\) Employment: technological displacement: notice.](#)
- [AB 1883 \(Bryan\) Workplace surveillance tools.](#)
- [AB 2656 \(Petrie-Norris\) Public employees: notice: artificial intelligence performing service within scope of work.](#)



CALIFORNIA SPECIAL DISTRICTS ASSOCIATION PRIORITIES

TAKE ACTION BRIEF

Awaiting Outcome of CARB 15-Day Comment Period on ACF ZEV Mandate

The California Air Resources Board (CARB) now has until August 1, 2026 to finalize its Final Statement of Record (FSOR) and submit its final rulemaking package to the Office of Administrative Law (OAL) for its current rulemaking process on the Advanced Clean Fleets (ACF) regulation. The timing of the FSOR depends in part on the volume and complexity of public comments submitted. CARB is required to summarize and respond to every unique, relevant comment received during both the 45-day and 15-day periods.

Under the California Administrative Procedure Act (APA), CARB must complete its regulatory process within a one-year period or the rulemaking is void and must start over. CARB first-initiated the 45-day notice for amendments to its ACF regulation on August 1, 2025.

OAL has 30 working days to approve or disapprove a final rulemaking package once it has been submitted by CARB. Once approved and filed with the California Secretary of State, regulations generally take effect on a quarterly schedule (January 1, April 1, July 1, or October 1), depending on the date upon which they are filed.

To learn more, visit the [CARB rulemaking page](#) and csda.net/ZEV-Flexibility. Also, in case you missed it, see last week's article in CSDA eNews: [MUST READ: Details Emerge on CARB Truck Ban – Last Chance to Help](#)

Action Pending on High-Speed Rail Property Tax Diversion Proposal

On April 29, 2026, the California High-Speed Rail Authority (HSRA) convened a meeting of its board of directors. On their agenda was an item to consider the adoption of the draft 2026 business plan – a plan, that, among other provisions, contains elements related to tax increment financing and land use authority that are opposed by CSDA and a coalition of other local government association stakeholders.

Rather than approve the business plan, HSRA directors opted to delay the vote until May 20. Board Chair Tom Richards relayed that the decision to delay the vote was necessary "to address a large volume of public comments as well as to have the authority to continue coordinating with the administration." The HSRA then cancelled the May 20 meeting and is now expected to take up the business plan at its upcoming June 1 meeting.

Notably, the HSRA's business plan earned highly critical comments from the high-speed rail project's Office of the Inspector General and the Legislative Analyst's Office. Concerns centered on an ongoing lack of transparency and suspect accounting methods that made various assumptions based on actions that had yet to happen.

Later on April 29, KCRA's Ashely Zavala reported that a spokesperson for the HSRA said the Authority would formally send the finalized version of its plan to the California Legislature by June 1, and that the Authority intended to review the feedback it has received on the plan and also align it with State Budget negotiations that are finalized by the end of June between lawmakers and the Governor.



CALIFORNIA SPECIAL DISTRICTS ASSOCIATION PRIORITIES

TAKE ACTION BRIEF

CSDA Weighs in on Eminent Domain and CA Public Records Act Court Cases

CSDA's efforts to represent the voice of special districts reaches beyond the Capitol and into the courts. Amicus actions filed by CSDA can be found in the Legal Tracking Library on the CSDA website: <https://www.csdanet/viewdocument/2026>. Recent CSDA amicus actions include:

Town of Apple Valley v. Apple Valley Ranchos Water, et al. (Supreme Court of California)

The Supreme Court of California has granted review in this case to resolve the following question:

"When a public entity files an eminent domain action seeking to take privately held public utility property, and the owner objects to the right to take, ***what is the proper standard of judicial review*** for the trial court to apply to determine whether the property owner has rebutted the presumptions under Code of Civil Procedure sections 1245.250, subdivision (b) and 1240.650, subdivision (c)?" (Emphasis added.)

CSDA joined an amicus brief in support of the Town of Apple Valley, arguing that: legislative actions such as an eminent domain resolution of necessity are entitled deferential review, and that a gross abuse of discretion standard should be applied by any court reviewing a local agency determination for eminent domain taking purposes. The case has been fully briefed, however oral arguments have not been scheduled yet. CSDA will continue to monitor the case for developments.

San Diego Unified Port District v. Castanares (Fourth District Court of Appeal)

CSDA became involved in this case to highlight the importance of upholding the attorney-client privilege of reports of confidential workplace investigations including exhibits counsel transmit to their public agency clients. The trial court in this case erred in finding the privilege covered an attorney's report to the district, but somehow not the attachments transmitted with the report to the district as confidential attorney-client communication, which it declared must be produced pursuant to a request under the California Public Records Act. As stated in the local government amicus brief, this result is not only incongruous and contradicts settled law but, if upheld, it would undermine public policy in protecting confidential communications between attorney and client in the course of their relationship regardless of the content and regardless of whether the communication includes information or documents that might be discoverable through some other means. Allowing courts to parse exhibits to attorney-client communications for privilege would be significantly detrimental for lawyers conducting confidential workplace investigations as well as their public agency clients.

In this case, the Port argued that two records and all 102 attachments are protected by the attorney-work product and attorney-client privileges and therefore are not subject to disclosure under the Public Records Act. The Court ordered the preparation of a privilege log and two amendments to the privilege log to reflect a description of each record, date, who prepared the record, and in the case of the interviews, who was interviewed and whether there were any third parties present.

CSDA joined a brief in support of the Port, arguing that the confidential summary report and associated attachments are protected by the attorney-client privilege, and the CPRA does not require the disclosure of records attached as exhibits to a privileged attorney-client communication. In addition, public policy favors maintaining exhibits to confidential communications as exempt from disclosure under the CPRA. The case is now pending in the Fourth District, with additional supplemental briefing requested by the court.



CALIFORNIA SPECIAL DISTRICTS ASSOCIATION PRIORITIES

TAKE ACTION BRIEF

2026 GM Leadership Summit in Newport Beach, CA

General managers and emerging leaders from special districts across California gather at the General Manager Leadership Summit to engage in meaningful peer networking, gain fresh insights, and strengthen their leadership skills. This dynamic event features inspiring keynote speakers and expert-led breakout sessions covering governance best practices, legal updates, human resources, budgeting, operations, and more—all tailored to the unique challenges of district leadership.

Attendees enjoy interactive networking opportunities throughout the summit, including receptions, meals, and collaborative discussions that foster lasting connections. You'll return to your district energized and equipped with new strategies to elevate your board relationships, staff engagement, and organizational impact.

Learn More and Register at: GMSummit.csda.net
Early Bird Registration – On or Before May 29, 2026

- CSDA Member: \$890 Early Registration / \$990 Regular Registration CSDA Member
- Non-Member: \$1,780 Early Registration / \$1,980 Regular Registration

OTHER WAYS TO TAKE ACTION

Join Today

Join an Expert Feedback Team to provide CSDA staff with invaluable insights on policy issues. Email annac@csda.net to inquire about joining one of the following teams:

- Housing and Community Development
- Governance
- Human Resources & Personnel
- Local Revenue
- Public Works and Facilities

Stay Informed

In addition to the many ways you can **TAKE ACTION** with CSDA's advocacy efforts, CSDA offers a variety of tools to keep you up-to-date and assist you in your district's legislative and public outreach. Make sure you're reading these resources:

- CSDA's weekly e-Newsletter
- Districts in the News
- CSDA's *California Special Districts Magazine*

Email updates@csda.net for help accessing these additional member resources.

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Roundtable Women's Club of Placentia Updates from Secretary Dahl.

DATE: June 22, 2026

BACKGROUND

Secretary Dahl will provide an update on the Roundtable Women's Club activities.



PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: LAFCO Updates from Trustee Beverage

DATE: June 22, 2026

BACKGROUND

Trustee Beverage will provide an update on LAFCO activities.

Attachment A is a copy of the June 10, 2026 agenda.



2677 North Main Street | Suite 1050

Santa Ana, CA 92705

Phone: 714.640.5100 | Fax: 714.640.5139

LOCAL AGENCY FORMATION COMMISSION OF ORANGE COUNTY

REGULAR MEETING AGENDA

**Wednesday, June 10, 2026
8:15 a.m.**

County Administrative North (CAN)

First Floor Multipurpose Room 101

400 W. Civic Center Drive, Santa Ana, CA 92701

Members of the public may access the audio/video live-streamed meeting at

<https://youtube.com/live/QWpQioZo7g8?feature=share>

Any member of the public may request to speak on any agenda item at the time the Commission is considering the item.

1. CALL THE MEETING TO ORDER

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL

4. ANNOUNCEMENT OF SUPPLEMENTAL COMMUNICATION

(Communications received after agenda distribution for agenda items.)

5. PUBLIC COMMENT

This is an opportunity for members of the public to address the Commission on items not on the agenda, provided that the subject matter is within the jurisdiction of the Commission and that no action may be taken by the Commission on off-agenda items unless authorized by law.

6. CONSENT CALENDAR

a.) May 13 – Regular Commission Meeting Minutes

The Commission will consider approval of the May 13, 2026 meeting minutes.

7. PUBLIC HEARING

No public hearing items are scheduled.

8. COMMISSION DISCUSSION AND ACTION

a.) Amendments to the Local Guidelines for Implementing the California Environmental Quality Act (CEQA)

The Commission will consider amendments to the local guidelines for implementing CEQA.

b.) Professional Consultant Agreement with Platinum Strategies Inc.

The Commission will consider approval of a professional services agreement with Platinum Strategies Inc. for independent accounting services.

c.) Update on Recent Activity of the Alliance of Local Agency Formation Commissions

The Commission will receive an update on the Alliance of Local Agency Formation Commissions' current activities and consider OC LAFCO's continued participation as a member of the Alliance.

d.) Legislative Report (June 2026)

The Commission will receive an update on the status of bills previously reviewed and recent activity by the Alliance Legislative Committee.

e.) Selection Process and Appointment of OC LAFCO Regular Public Member

The Commission will consider the appointment of the Regular Public Member for the term beginning on July 1, 2026, and expiring on June 30, 2030.

f.) County Unincorporated Islands & Disadvantaged Unincorporated Communities (DUCs) Update

The Commission will receive a report on the remaining county unincorporated islands and disadvantaged unincorporated communities.

9. COMMISSIONER COMMENTS

This is an opportunity for Commissioners to comment on issues not listed on the agenda, provided that the subject matter is within the jurisdiction of the Commission. No discussion or action may occur or be taken except to place the item on a future agenda if approved by the Commission majority.

10. EXECUTIVE OFFICER'S REPORT

Executive Officer's announcement of upcoming events and a brief report on activities of the Executive Officer since the last meeting.

11. INFORMATIONAL ITEMS & ANNOUNCEMENTS

No informational items or announcements.

12. ADJOURNMENT OF REGULAR COMMISSION MEETING

The next Regular Commission Meeting will be held on Wednesday, July 8, 2026, at 8:15 a.m. at the County Administrative North (CAN), First Floor Multipurpose Room 101, 400 W. Civic Center Drive, Santa Ana, CA 92701.

PUBLIC PARTICIPATION:

The Local Agency Formation Commission of Orange County welcomes your participation. The public may share general comments or comments on agenda items through the following options:

- 1) **In-person** comments may be provided during the general comment period on off-agenda items and during the hearing of a specific agenda item. In accordance with the OC LAFCO guidelines, each speaker's comments may not exceed three (3) minutes for the respective item. If you have documents for the Commission, please bring 15 copies and submit to the Commission Clerk for distribution.
- 2) **Audio/Video Live Streaming:** The public may view and listen to the meeting live on YouTube using the link provided on the website homepage (www.oclafco.org). However, LAFCO cannot guarantee that the public's access will be uninterrupted, and technical difficulties may occur from time to time. The meeting will continue despite technical difficulties for participants using audio/video live streaming unless otherwise prohibited by State open meeting laws.
- 3) **Written** general comments or comments on specific agenda items may be submitted by email to the Commission Clerk at ccarter-benjamin@oclafco.org. Comments received no less than twenty-four (24) hours prior to the regular meeting will be distributed to the Commission and included in the record.

Pursuant to Government Code Section 54957.5, public records that relate to open session agenda items that are distributed to a majority of the Commission less than seventy-two (72) hours prior to the meeting will be made available to the public on the OC LAFCO website at www.oclafco.org.

"Pursuant to State law, a participant in an OC LAFCO proceeding who has a financial interest in a decision and who has made a campaign contribution of more than \$250 to any commissioner in the past year may be required to disclose the contribution. If you are affected, please notify the Commission's staff before the hearing in order to determine whether disclosure is warranted."

AMERICANS WITH DISABILITIES ACT (ADA)

All regular meeting agendas and associated reports are available at www.oclafco.org. Any person with a disability under the Americans with Disabilities Act (ADA) may receive a copy of the agenda or associated reports upon request. Any person with a disability covered under the ADA may also request a disability-related modification or accommodation, including auxiliary aids or services, to participate in a public meeting. Requests for copies of meeting documents and accommodations shall be made with OC LAFCO staff at (714) 640-5100 at least three business days prior to the respective meeting.