

BOARD OF SUPERVISORS

Michael Sanchez, 1st District
Kevin Goss, 2nd District
Sharon Thrall, 3rd District
Lori Simpson, Chair 4th District
Jeff Engel, Vice Chair 5th District

**AGENDA FOR REGULAR MEETING OF JANUARY 17, 2017 TO BE HELD AT 11:00 A.M.
IN THE BOARD OF SUPERVISORS ROOM 308, COURTHOUSE, QUINCY, CALIFORNIA**

www.countyofplumas.com

AGENDA

The Board of Supervisors welcomes you to its meetings which are regularly held on the first three Tuesdays of each month, and your interest is encouraged and appreciated.

Any item without a specified time on the agenda may be taken up at any time and in any order. Any member of the public may contact the Clerk of the Board before the meeting to request that any item be addressed as early in the day as possible, and the Board will attempt to accommodate such requests.

Any person desiring to address the Board shall first secure permission of the presiding officer. For noticed public hearings, speaker cards are provided so that individuals can bring to the attention of the presiding officer their desire to speak on a particular agenda item.

Any public comments made during a regular Board meeting will be recorded. The Clerk will not interpret any public comments for inclusion in the written public record. Members of the public may submit their comments in writing to be included in the public record.

CONSENT AGENDA: These matters include routine financial and administrative actions. All items on the consent calendar will be voted on at some time during the meeting under "Consent Agenda." If you wish to have an item removed from the Consent Agenda, you may do so by addressing the Chairperson.



REASONABLE ACCOMMODATIONS: In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting please contact the Clerk of the Board at (530) 283-6170. Notification 72 hours prior to the meeting will enable the County to make reasonable arrangements to ensure accessibility. Auxiliary aids and services are available for people with disabilities.

STANDING ORDERS

11:00 A.M. CALL TO ORDER/ROLL CALL

PLEDGE OF ALLEGIANCE

ADDITIONS TO OR DELETIONS FROM THE AGENDA

PUBLIC COMMENT OPPORTUNITY

Matters under the jurisdiction of the Board, and not on the posted agenda, may be addressed by the general public at the beginning of the regular agenda and any off-agenda matters before the Board for consideration. However, California law prohibits the Board from taking action on any matter which is not on the posted agenda unless it is determined to be an urgency item by the Board of Supervisors. Any member of the public wishing to address the Board during the "Public Comment" period will be limited to a maximum of 3 minutes.

DEPARTMENT HEAD ANNOUNCEMENTS/REPORTS

Brief announcements by, or brief reports on their activities by County Department Heads

ACTION AGENDA

1. CONSENT AGENDA

These items are expected to be routine and non-controversial. The Board of Supervisors will act upon them at one time without discussion. Any Board members, staff member or interested party may request that an item be removed from the consent agenda for discussion. Additional budget appropriations and/or allocations from reserves will require a four/fifths roll call vote.

A) SHERIFF

Authorize the Auditor/Controller to process an invoice without a service contract from PG&E of \$2,500 for work to be done on Radio Hill

B) SOCIAL SERVICES

- 1) Authorize the Department of Social Services to recruit and fill vacant, funded and allocated 1.0 FTE Office Assistant I/II position, created by resignation
- 2) Authorize the Department of Social Services to recruit and fill vacant, funded and allocated 1.0 FTE Social Worker I/II/III position, created by transfer to another county department

C) DISTRICT ATTORNEY

Adopt **RESOLUTION** authorizing the District Attorney to execute and administer a Grant Award Agreement for the Edward Byrne Memorial Justice Assistant Grant (JAG) Program

2. DEPARTMENTAL MATTERS

A) SHERIFF – Greg Hagwood

Approve budget transfer of \$14,000 from AB443 (Dept. 70331) fixed asset account 542200-Communication Equipment to 521900-Professional Services to correct a FY 2016-2017 budget error; discussion and possible action

B) SOCIAL SERVICES – Elliott Smart

Authorize reallocation of an existing Senior Social Worker position in the Department of Social Services to the class of Social Services Supervisor I/II; and authorize the Department of Social Services to recruit and fill the position on a promotional basis; discussion and possible action

C) **DISTRICT ATTORNEY** – David Hollister

District Attorney to present an overview and state of the District Attorney's Office

D) **FACILITY SERVICES** – Dony Sawchuk

Authorize the purchase of a used 2009 Service Truck, Ford F350, 4-Wheel Drive, Utility Service Body not to exceed \$24,267 and authorize the Director of Facility and Airport Services to sign all related documents, price includes all State documentation, fees, tax and licensing; approved as to form by County Counsel; discussion and possible action

E) **PUBLIC HEALTH AGENCY** – Mimi Hall

- 1) Approve supplemental budget of \$10,642 for unanticipated revenues from the California Department of Public Health (CDPH) Emergency Preparedness Office (EPO) Public Health Emergency Preparedness; four/fifths required roll call vote
- 2) Approve budget transfer in Public Health 70566, which includes a transfer redirecting grant expenditures of \$33,498, based on final approved budget for CDPH EPO Public Health Emergency Preparedness; discussion and possible action
- 3) Approve supplemental budget of available Fund Balance from FY 15/16 to Public Health 70560 of \$230,134 for salaries due to nursing position increases; discussion and possible action
- 4) Receive and accept the Plumas County Public Health Agency's Strategic Plan as submitted; discussion and possible action
- 5) Budget presentation regarding Public Health funding streams

3. **BOARD OF SUPERVISORS**

- A. Review and update of "Guidelines for Tax Exchange Negotiations for Annexations"; discussion and possible action
- B. Property tax exchange negotiations in connection with annexation of Brussard property to Chester Public Utility District (LAFCo File 2016-ANNX-0001): 1) Direct Clerk of the Board to give notice extending time for property tax exchange negotiations by 30 days; 2) Set date for negotiation meeting with the District before the Board of Supervisors; 3) Direct Clerk of the Board to notify Chester Public Utility District to provide information required by Guidelines for Tax Exchange Negotiations for Annexations; and/or give other direction to staff
- C. Request from Quincy Fire Protection District for Post-Annexation Transfer Property Tax revenue from Plumas County; discussion and possible action
- D. Correspondence
- E. Weekly report by Board members of meetings attended, key topics, project updates, standing committees and appointed Boards and Associations

4. CLOSED SESSION

ANNOUNCE ITEMS TO BE DISCUSSED IN CLOSED SESSION

- A. Personnel: Public employee performance evaluation – Agricultural Commissioner/Sealer of Weights and Measures
- B. Conference with Legal Counsel: Significant exposure to litigation pursuant to Subdivision (d)(2) of Government Code Section 54956.9
- C. Conference with Labor Negotiator regarding employee negotiations: Sheriff's Administrative Unit; Sheriff's Department Employees Association; Operating Engineers Local #3; Confidential Employees Unit; Probation; Unrepresented Employees and Appointed Department Heads

REPORT OF ACTION IN CLOSED SESSION (IF APPLICABLE)

ADJOURNMENT

Adjourn meeting to Tuesday, February 7, 2017, Board of Supervisors Room 308, Courthouse, Quincy, California.




GREGORY J. HAGWOOD
SHERIFF/CORONER

Office of the Sheriff

1400 E. Main Street, Quincy, California 95971 • (530) 283-6375 • Fax 283-6344

1A

Memorandum

DATE: January 4, 2017
TO: Honorable Board of Supervisors
FROM: Sheriff Greg Hagwood 
RE: Agenda Items for the meeting of January 17, 2017

It is recommended that the Board:

Authorize Auditor to pay invoice to PG&E for services provided without a service contract.

Background and Discussion:

PG&E is requesting an engineering advance for work to be done for the Title III project on Radio Hill. The work will not be done until this advance is received.

The Sheriff's Office respectfully requests approval to submit invoice #0007603115-2 in the amount of \$2,500.00 received from PG&E to the Auditor for payment and authorize the Auditor to pay the invoice submitted.

STATE OF CALIFORNIA

VENDOR # 71032

ADDRESS **PO Box 997300**

CITY/ST./ZIP Sacramento, CA 95899-7300

FUND # 0017G

[illegible]

Contract Attached Y/N ____

Sales Tax Journal Attached Y/N _____ # _____

Fixed Asset Form Attached Y/N _____

W/9 Form Attached Y/N

The undersigned, under penalty of perjury, states: That the above claim and the items as therein set out are true and correct; that no part thereof has been theretofore paid, and that the amount therein is justly due, and that the same is presented within one year after the last item thereof has accrued.

FIRM NAME

1/4/2017

DATE _____

BY

TITLE

SIGNATURE OF CLAIMANT/VENDOR

Auditor's Use Only		DEPARTMENT/DISTRICT APPROVAL:	
Vendor #		I hereby certify upon my own personal knowledge that the articles or services specified in the above claim were necessary and were ordered by me for the purpose indicated hereon; that the articles have been delivered or the services have been performed by the claimant as set forth with the exception noted.	
Audited			
Input			
Checked			
Date Stamp:		Claim is thereby approved for the sum of _____ \$2,500.00	
		Signed _____	
		Title _____ SHERIFF	
		For Districts	
		District _____	
		If applicable: _____	
		Second Signature _____	

Title III

70331-521900

SEE OUR PROGRESS AT PGE.COM

Engineering Advance

9997000760311520000250000000250000

Invoice Number	Invoice Date	Amount Due	Amount Enclosed
0007603115 -2	12/22/2016	\$ 2,500.00	2500.00

PLUMAS COUNTY SHERIFF OFC
1400 E MAIN ST
QUINCY CA 95971

PG&E
Box 997300
Sacramento, CA
95899-7300

To Pay Online, please go to <http://www.pge.com/ProjectPayments> or
Please return this portion with your payment. Thank you.

*

When Making Inquiries or Address Changes,
Please Contact :

Customer Number
1465747

Caroline Branch
530-894-4707

Invoice Number
0007603115 -2

In connection with your application for new gas and/or electric service and as explained in the application, PG&E will require a cash payment in advance for your project. This advance payment is required for the cost of an engineering review, design work, and cost development. The amount of the advance is based upon PG&E's current costs, utilizing the information submitted in your application for new service addressing the scope of your project.

Your project manager will review the scope of work needed to complete a construction quality estimate. If the billed engineering advance is insufficient to cover PG&E's design and project management costs or other work as required, PG&E may require an additional advance before proceeding.

The engineering advance will be applied to the total contract cost upon completion of the design and cost estimate. Any difference between the engineering advance and contract cost will either be refunded (without interest) or billed, as applicable. At any time you may request that we stop your project, however, we may retain all or a portion of the engineering advance and bill any costs incurred above that amount. This fee is dependent upon the amount of work PG&E has performed at the time of cancellation.

If this requested advance payment is not received by PG&E within 90 days from the date of this invoice, PG&E reserves the right to cancel this application for service.

IMPORTANT: By going forward with this project and paying the engineering advance to PG&E you are also agreeing to pay PG&E for all costs PG&E incurs for your project in the event that your project is cancelled, even if the costs PG&E incurs are more than this advance.

Notification : 112420356

Project Description : EP 677 RADIO HILL RD QUINCY

Line Item Subtotal 2,500.00

AMOUNT NOW DUE \$ 2,500.00



ELLIOTT SMART
DIRECTOR


DEPARTMENT OF SOCIAL SERVICES
AND PUBLIC GUARDIAN

Courthouse Annex, 270 County Hospital Rd., Suite 207, Quincy, CA 95971-9174

(530) 283-6350
Fax: (530) 283-6368

DATE: JANUARY 6, 2017

TO: HONORABLE BOARD OF SUPERVISORS

FROM: ELLIOTT SMART, DIRECTOR
DEPT. OF SOCIAL SERVICES 

SUBJ: BOARD AGENDA ITEM FOR JANUARY 17, 2017

RE: AUTHORIZATION TO FILL A VACANT OFFICE ASSISTANT I/II
POSITION

It is Recommended that the Board of Supervisors

Authorize the Department of Social Services to fill one vacant 1.00 FTE Office Assistant I/II position as soon as administratively possible.

Background and Discussion

The Department of Social Services has experienced a vacancy in the Office Assistant I/II class. The position is vacant due to the prior incumbent leaving county service November 14, 2016. This OA position performs application screening for applications for assistance, clerical reception, finger imaging and telephone reception for the Department. The work is critical to effectively serving the public and to meeting our requirement to screen applications for emergencies.

The Department requests the authority to fill the position as soon as administratively feasible.

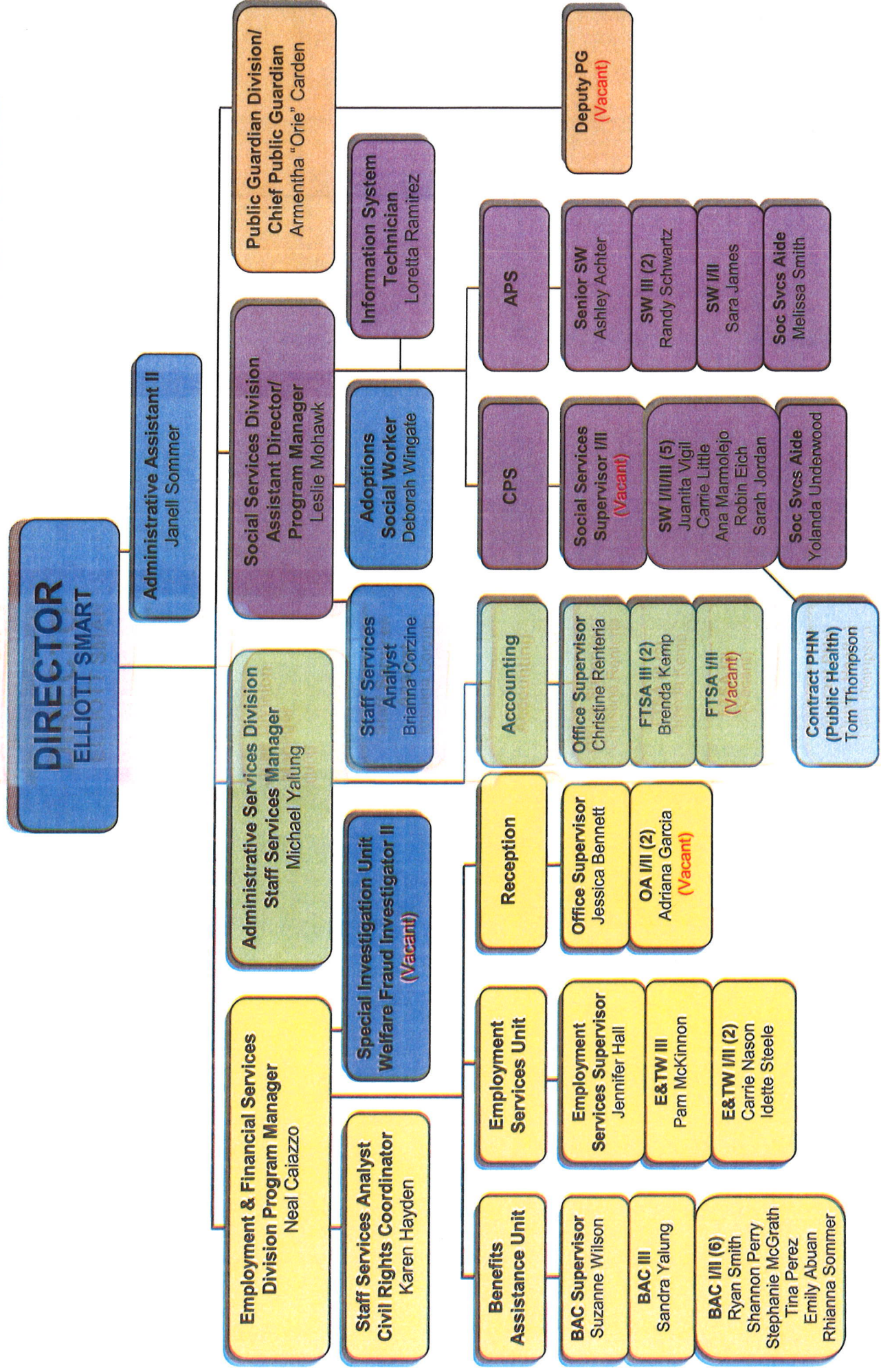
Financial Impact

This is a budgeted and funded position. There is no impact to the General Fund as funding comes from federal, state and 1991 Realignment sources.

Copies: DSS Management Staff

Enclosures (3)

PLUMAS COUNTY DEPARTMENT OF SOCIAL SERVICES & PUBLIC GUARDIAN



QUESTIONS FOR STAFFING CRITICAL POSITIONS WHICH ARE CURRENTLY ALLOCATED.

Position: Office Assistant – Clerk/Receptionist

- Is there a legitimate business, statutory or financial justification to fill the position?

Answer: Yes. Public social services are state mandated.

- Why is it critical that this position be filled prior to the adoption of the County's budget this summer?

Answer: The position is funded in the current budget and has no General Funds associated with it. Additionally the caseload is growing and the state provides funds to meet this growth. The position performs state mandated fingerprint imaging and screening of applicants.

- How long has the position been vacant?

Answer: The position became vacant effective November 14, 2016.

- Can the department use other wages until the budget is adopted?

Answer: No.

- What are staffing levels at other counties for similar departments and/or positions?

Answer: Other counties are structured in a very similar way. The state determines appropriate staffing levels and funds accordingly.

- What core function will be impacted without filling the position prior to July 1?

Answer: We will not be able to process perform tasks associated with eligibility determinations due to not having a clerk receptionist that can log in and conduct screening for program eligibility.

- What negative fiscal impact will the County suffer if the position is not filled prior to July 1?

Answer: We will not expend state funds that have been allocated to this function .

- A non-general fund department head need to satisfy that he/she has developed a budget reduction plan in the event of the loss of future state, federal or local funding? What impact will this reduction plan have to other County departments?

Answer: The Department has developed a variety of budget reduction strategies that are dependent upon state policy decisions. Other Departments could be impacted by such reduction strategies.

- Does the department expect other financial expenditures which will impact the general fund and are not budgeted such as audit exceptions?

Answer: No.

- Does the budget reduction plan anticipate the elimination of any of the requested positions?

Answer: No.

- Departments shall provide an estimate of future general fund support for the next two years and how the immediate filling of this position may impact, positively or negatively, the need for general fund support?

Answer: The Department does not currently utilize County General Fund dollars. Filling this position does not change that.

- Does the department have a reserve? If yes, provide the activity of the department's reserve account for the last three years?

Answer: The Department does have a reserve. The balance fluctuates depending upon a number of factors including whether or not the State achieves the base amount of collection for any given year.

Position Classification: Office Assistant I/II

FTE: 1.00

Budgeted Position: Yes

Mandated Program: Yes

Position Description: This position is responsible for clerical support and reception services that support all programs in the Department. The incumbent performs a variety of clerical/reception work including screening and logging into the ISAWS system including the initial eligibility application for public assistance benefits. This position is also responsible for logging new clients into the Fingerprint Imaging System. The incumbents sorts and delivers incoming Departmental mail and, may make deliveries to the Courthouse.

Funding Sources: The funding to support this position comes from federal pass through dollars, the State General Fund and county Realignment dollars. There is no cost to the County General Fund associated with this position.



ELLIOTT SMART
DIRECTOR


DEPARTMENT OF SOCIAL SERVICES
AND PUBLIC GUARDIAN

Courthouse Annex, 270 County Hospital Rd., Suite 207, Quincy, CA 95971-9174

(530) 283-6350
Fax: (530) 283-6368

DATE: JANUARY 5, 2017

TO: HONORABLE BOARD OF SUPERVISORS

FROM: ELLIOTT SMART, DIRECTOR 
DEPARTMENT OF SOCIAL SERVICES

SUBJ: BOARD AGENDA ITEM FOR JANUARY 17, 2017

RE: AUTHORIZATION TO FILL A VACANT AND FUNDED SOCIAL WORKER
I/II/III POSITION IN THE DEPARTMENT'S CHILD PROTECTIVE
SERVICES PROGRAM

It is Recommended that the Board of Supervisors

Authorize the Department of Social Services to fill a vacant and funded Social Worker I/II/III position in the Department of Social Services as soon as administratively possible.

Background and Discussion

The Department of Social Services has experienced a recent vacancy in the class of Social Worker I/II/III. This position became vacant on January 13, 2017, when the incumbent notified the Department that she had accepted a Case Manager position in the Behavioral Health Department. As explained more completely in the accompanying documents, this position is part of our Child Welfare Services system and is therefore, critical for assuring the safety of vulnerable adults who are trying to live independently.

A Table of Organization showing the vacancy is also attached. Although it is not shown on this Table, the Department has experienced twelve vacancies in social worker positions in only 60 months, or in a period of five years. The average stay for a social worker who resigned during this time period has been just under fourteen (14) months.

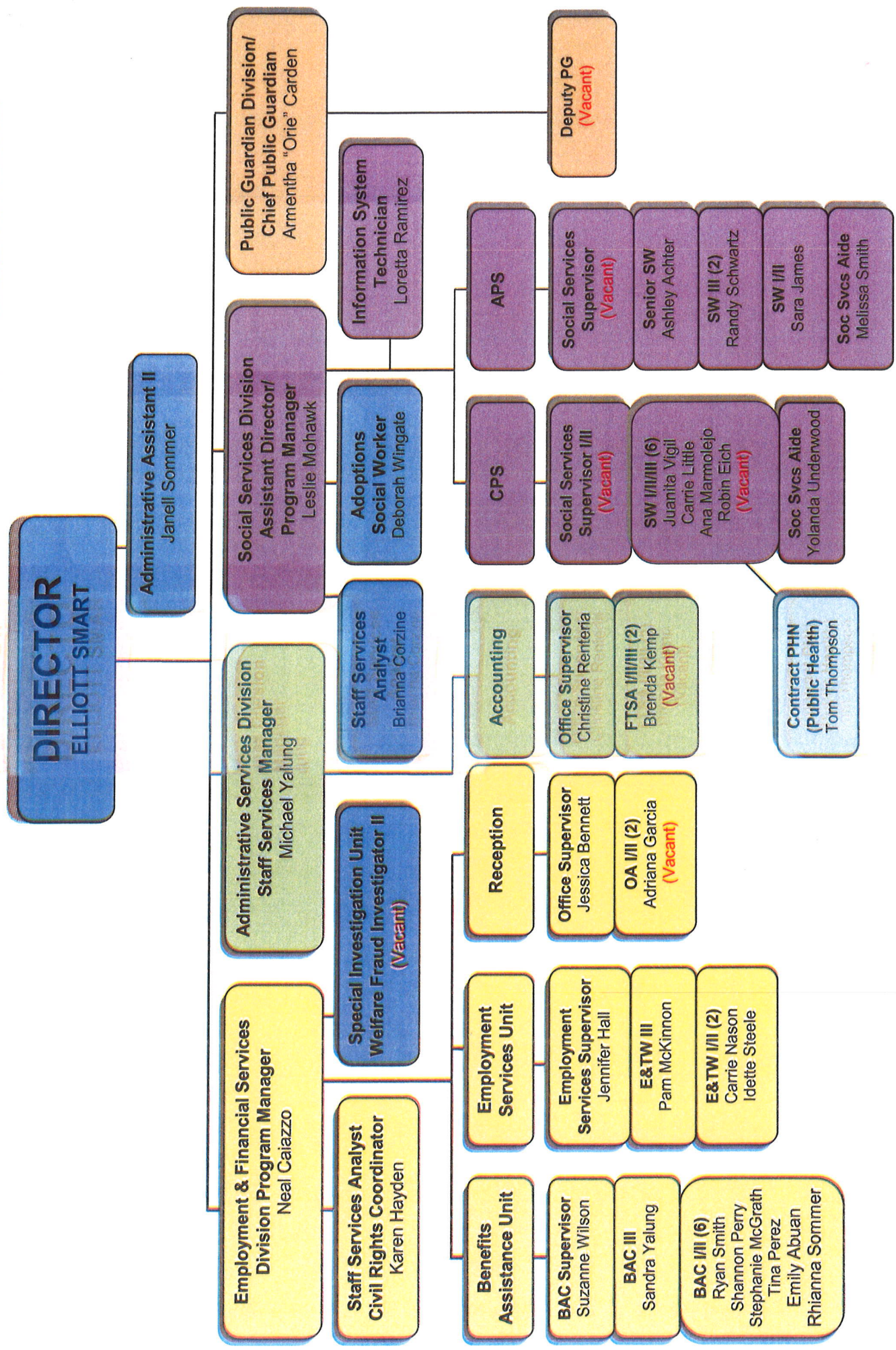
Financial Impact

This position is funded in this year's County budget. There is no impact to the County General fund as the position is funded by State, Federal and Realignment dollars.

Copy: DSS Management Staff

Enclosures

PLUMAS COUNTY DEPARTMENT OF SOCIAL SERVICES & PUBLIC GUARDIAN



QUESTIONS FOR STAFFING CRITICAL POSITIONS WHICH ARE CURRENTLY ALLOCATED.

Position: Social Worker – Child Protective Services

- Is there a legitimate business, statutory or financial justification to fill the position?

Answer: Yes. Child Protective Services is a state mandated program.

- Why is it critical that this position be filled prior to the adoption of the County's budget this summer?

Answer: The position is assigned duties that include public protection, specifically, abused and neglected children.

- How long has the position been vacant?

Answer: The position was vacated effective January 13, 2017.

- Can the department use other wages until the budget is adopted?

Answer: No.

- What are staffing levels at other counties for similar departments and/or positions?

Answer: Staffing levels for this program are a function of the allocation of state general fund dollars for the position. Currently, the state provides funding for six social workers in Plumas County for this program.

- What core function will be impacted without filling the position prior to July 1?

Answer: Children may not be protected from abuse leading to potential tragic circumstances.

- What negative fiscal impact will the County suffer if the position is not filled prior to July 1?

Answer: This position is funded by Federal and Realignment dollars. The Realignment dollars allocated to this program may not be used for other programs.

- A non-general fund department head need to satisfy that he/she has developed a budget reduction plan in the event of the loss of future state, federal or local

funding? What impact will this reduction plan have to other County departments?

Answer: The Department has developed a variety of budget reduction strategies that are dependent upon state policy decisions. Other Departments could be impacted by such reduction strategies. Currently Child Welfare Services is not among the programs impacted by proposed reductions in the State's budget.

- Does the department expect other financial expenditures which will impact the general fund and are not budgeted such as audit exceptions?

Answer: No.

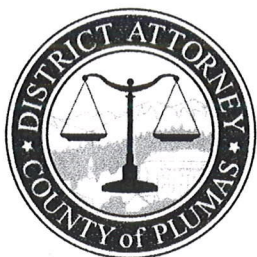
- Does the budget reduction plan anticipate the elimination of any of the requested positions?

Answer: No.

- Departments shall provide an estimate of future general fund support for the next two years and how the immediate filling of this position may impact, positively or negatively, the need for general fund support?

Answer: The Department does not presently utilize General Fund dollars. Filling this position does not change that.

- Does the department have a reserve? If yes, provide the activity of the department's reserve account for the last three years?
- **Answer: Yes. The Department does have a reserve. The balance fluctuates depending upon a number of factors including whether or not the State achieves the base amount of collection for any given year.**



OFFICE OF THE DISTRICT ATTORNEY

David Hollister, District Attorney

520 Main Street, Room 404 · Quincy, California 95971

(530) 283-6303 · Fax (530) 283-6340

Date: January 17, 2017
To: The Honorable Board of Supervisors
From: David Hollister, District Attorney
Subject: JAG Grant Resolution for the Alternative Sentencing Program

Recommendation:

- A. Please approve the attached Board Resolution authorizing the District Attorney to execute and administer a Grant Award Agreement for 2017 entitled The Edward Byrne Memorial Justice Assistance Grant.

Background and Discussion

On October 19, 2016, the District Attorney, with support from the members of the Jag Steering Committee, submitted an application for a grant from the Board of State and Community Corrections (BSCC) Edward Byrne Memorial Justice Assistance Grant (JAG) Program. The Alternative Sentencing Program received an award of \$206,445 from the JAG Program for calendar year 2017. These funds will be used to assist rural Plumas County criminal justice partners to enhance public safety, foster collaboration and improve the outcomes of individuals under the supervision of community corrections.

This grant requires that local agencies involved collaborate in providing evidence-based clinical and other services. The primary partners of the District Attorney are Probation, the Sheriff and Jail, Public Health, Alcohol and other Drug Services, and the Court. Other participating agencies in the Community Corrections Partnership are Plumas County Office of Education Foster/Homeless Program, the Literacy Program, Plumas Crisis Intervention and Resource Center and other non-profit service providers.

A copy of the Application is on file with the Clerk of the Board.

RESOLUTION No. 17-

WHEREAS the Plumas County Board of Supervisors desires to participate in the Edward Byrne Memorial Justice Assistance Grant (JAG) Program supported by federal grant funds and administered by the Board of State and Community Corrections (hereafter referred to as BSCC).

NOW, THEREFORE, BE IT RESOLVED that the District Attorney of Plumas County is authorized on behalf of the Board of Supervisors to submit the grant proposal for this funding and to accept the award for the attached application for January 1, 2017 to December 31, 2017 from BCCS and is authorized to sign on behalf of the Board the Grant Agreement including any extensions or amendments thereof.

IT IS AGREED that any liability arising out of the performance of this Grant Award, including civil court actions for damages, shall be the responsibility of the grant recipient and the authorizing agency. The Board of State and Community Corrections disclaim responsibility for any such liability.

BE IT FURTHER RESOLVED that federal grant funds received hereunder shall not be used to supplant expenditures controlled by this body.

BE IT FURTHER RESOLVED that the county agrees to abide by the statutes and regulations governing the federal JAG Program as well as the terms and conditions of the Grant Agreement as set forth by the BSCC.

IT IS ALSO RESOLVED that grant funds received hereunder shall be deposited with the Plumas County Treasurer and budgeted in accordance with California law and Plumas County policy.

I hereby certify that the foregoing is a true copy of the resolution adopted by the Board of Supervisors of Plumas County in a meeting thereof held on January 17, 2017 by the following:

Vote: **Ayes:**
Noes:
Absent:

Signature: _____ Date: _____
Lori Simpson, Chair
Plumas County Board of Supervisors

ATTEST: _____ Date: _____
NANCY DAFORNO, Clerk of the Board
Plumas County Board of Supervisors

**EXHIBIT A
SCOPE OF WORK**

8. AUDIT

Grantee must submit an audit of expenditures within 120 days following the end of the grant period. Grantees may choose either a program-specific audit or a single federal audit. Federal guidelines allow grantees receiving \$750,000 or more in federal funds in a fiscal year to use their federal justice assistance grant funds to pay for the cost of the audit. Grantees falling below the \$750,000 threshold must use non-federal funds (i.e., match funds) to pay for audit costs. For purposes of this grant award, please check one of the boxes below to indicate the grantee's choice for meeting the audit requirement.

- ☒ In conformance with Federal Office of Management and Budget (OMB) CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, and the California State Controller's Accounting Standards and Procedures, Chapter 23, Grant Accounting Index, the identified grant will be included in the City/County Single Federal Audit Report, which will be submitted to the BSCC within the required timeframe of 120 days from the end of the grant period. NOTE: Should an extension be needed, please provide in advance of the deadline a written justification that indicates the reason(s) for the extension and the timeframe needed.

OR

- ☐ In conformance with Federal Office of Management and Budget (OMB) CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, and the California State Controller's Accounting Standards and Procedures Chapter 23, Grant Accounting Index, the grantee will provide a Program-Specific Final Audit Report to the BSCC within the required timeframe of 120 days from the end of the grant period.

OR

- ☐ In conformance with Federal Office of Management and Budget (OMB) CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, the non-governmental entity grantee does not expend \$750,000 or more in total federal awards during the fiscal year and is therefore, exempt from Federal audit requirements for this grant contract period. However, the entity understands that it must keep and maintain the grant records and make them available for review or audit by appropriate officials of the Federal agency, pass-through agency (i.e., the Board of State and Community Corrections) and Governmental Accountability Office.




Office of the Sheriff

1400 E. Main Street, Quincy, California 95971 • (530) 283-6375 • Fax 283-6344

2A

GREGORY J. HAGWOOD
SHERIFF/CORONER

Memorandum

DATE: January 4, 2017
TO: Honorable Board of Supervisors
FROM: Sheriff Greg Hagwood 
RE: Agenda Item for the meeting of January 17, 2017

Recommended Action:

- 1) Approve and authorize a budget transfer in the amount of \$14,000.00 from the AB443 (dept 70331) fixed asset account for Communication Equipment (542200) to account for Professional Services (521900).

Background and Discussion:

The funds budgeted in the Communication Equipment account are for Title III communication projects. During budget preparation the funds were budgeted to the fixed asset account in error. A transfer is needed to cover expenses for services and supplies related to the Title III projects.

COUNTY OF PLUMAS
REQUEST FOR BUDGET APPROPRIATION TRANSFER
OR SUPPLEMENTAL BUDGET

TRANSFER NUMBER

(Auditor's Use Only)

Department: AB443

Dept. No: 70331

Date: 1/4/2017

The reason for this request is (check one):

- A. ☐ Transfer to/from Contingencies OR between Departments
 B. ☐ Supplemental Budgets (including budget reductions)
 C. ☒ Transfers to/from or new Fixed Asset, within a 51XXX
 D. ☐ Transfer within Department, except fixed assets
 E. ☐ Establish any new account except fixed assets

Approval Required

Board
 Board
 Board
 Auditor
 Auditor

☒ **TRANSFER FROM OR**

☐ **SUPPLEMENTAL REVENUE ACCOUNTS**

(CHECK "TRANSFER FROM" IF TRANSFER WITHIN EXISTING BUDGET, CHECK "SUPPLEMENTAL REVENUE" IF SUPPLEMENTAL, NEW UNBUDGETED REVENUE)

Fund #	Dept #	Acct #	Account Name	\$ Amount
0017G	70331	542200	COMMUNICATION EQUIPMENT	14,000.00
Total (must equal transfer to total)				14,000.00

☒ **TRANSFER TO OR**

☐ **SUPPLEMENTAL EXPENDITURE ACCOUNTS**

(CHECK "TRANSFER TO" IF TRANSFER WITHIN EXISTING BUDGET, CHECK "SUPPLEMENTAL EXPENDITURE" IF SUPPLEMENTAL, NEW UNBUDGETED EXPENSE)

Fund #	Dept #	Acct #	Account Name	\$ Amount
0017G	70331	521900	PROFESSIONAL SERVICES	14,000.00
Total (must equal transfer to total)				14,000.00

Supplemental budget requests require Auditor/Controller's signature

Please provide copy of grant award, terms of award, proof of receipt of additional revenue, and/or backup to support this request.

A) Transfer to cover shortage in account

B) Expenses budgeted to wrong account in error

C) Expenses to be incurred this fiscal year

D) N/A

Roni Lowery

Disapproved/ Not recommended

Board Approval Date: _____ Agenda Item No. _____

Date Entered by Auditor/Controller: _____ Initials _____

Original and 1 copy of ALL budget transfers go to Auditor/Controller. If supplemental request they must go to the Auditor/Controller. Original will be kept by Auditor, copies returned to Department after it is entered into the system.

If one copy of agenda request and 13 copies of Board memo and backup are attached, the entire packet will be forwarded, after all signatures are obtained, to the Clerk of the Board. If only the budget form is sent, it will be returned to the Department after all signatures are obtained.

A. Must be signed by the Auditor/Controller; if supplemental must be signed by the Auditor/Controller.



ELLIOTT SMART
DIRECTOR

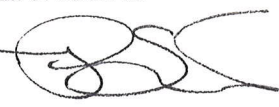
DEPARTMENT OF SOCIAL SERVICES
AND PUBLIC GUARDIAN

Courthouse Annex, 270 County Hospital Rd., Suite 207, Quincy, CA 95971-9174

(530) 283-6350
Fax: (530) 283-6368

DATE: DECEMBER 28, 2016

TO: HONORABLE BOARD OF SUPERVISORS

FROM: ELLIOTT SMART, DIRECTOR
DEPT. OF SOCIAL SERVICES 

SUBJ: BOARD AGENDA ITEM FOR JANUARY 17, 2016

RE: REALLOCATION OF AN EXISTING SENIOR SOCIAL WORKER POSITION TO
THE CLASS OF SOCIAL SERVICES SUPERVISOR I/II

It is Recommended that the Board of Supervisors

1. Approve the reallocation of an existing Senior Social Worker position in the Department of Social Services to the class of Social Services Supervisor I/II (MSS Class Social Worker Supervisor) effective upon approval.
2. Authorize the Department of Social Services to recruit for and fill the position on a promotional basis as soon as administratively possible.

Background and Discussion

Previously the Department has discussed with the Board, the concept of creating an integrated Adult Protective Services Unit within the Department of Social Services. Under the current organizational structure, Adult Protective Services and the In-Home Supportive Services programs are overseen by a Program Manager. The Department believes that integrating Adult Services programs supervised by a Social Services Supervisor aligns the service delivery system with other small and medium California counties and will better serve the Department's adult customers.

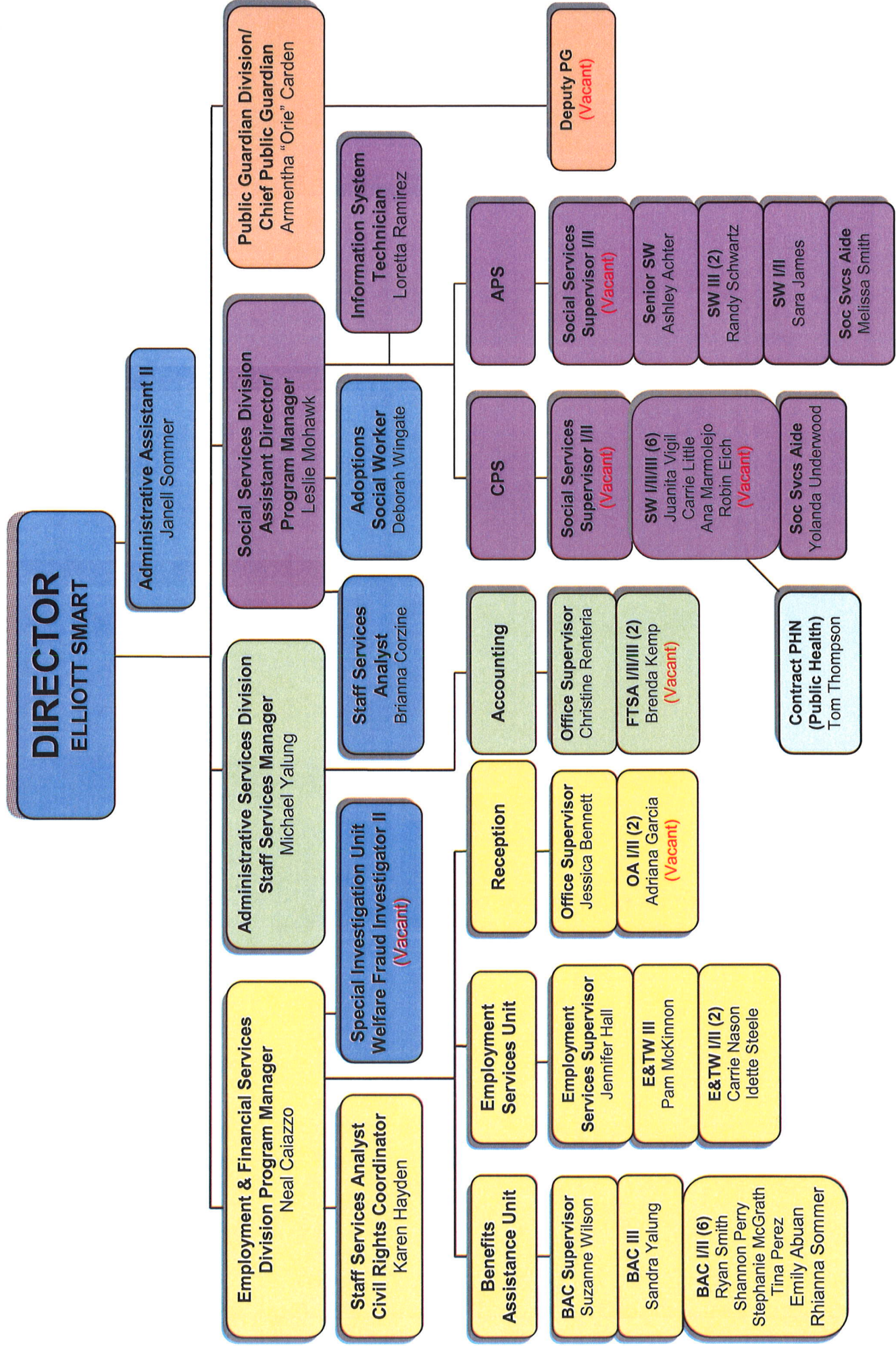
Financial Impact

There is minimal impact to the Department's budget because approval of this recommendation will reallocate an existing and budgeted position. In an accompanying table, the Department shows the change in cost over a five year period. The estimated changed is about \$6,000 annually. There is no impact to the County General Fund.

Copies: DSS Management

Enclosures: 1. Table of Organization
2. Table of Projected Costs
3. Classification Description

PLUMAS COUNTY DEPARTMENT OF SOCIAL SERVICES & PUBLIC GUARDIAN



Promote Senior Social Worker to Social Worker Supervisor I

	Year 1	Year 2	Year 3	Year 4	Year 5
Senior Social Worker 2123					
Hourly	\$ 28.49	\$ 28.49	\$ 28.49	\$ 29.92	\$ 29.92
Yearly	\$ 59,259.00	\$ 59,259.00	\$ 59,259.00	\$ 62,234.00	\$ 62,234.00
Social Worker Supervisor I 2228					
Hourly	\$ 31.38	\$ 31.38	\$ 31.38	\$ 32.95	\$ 32.95
Yearly	\$ 65,270.00	\$ 65,270.00	\$ 65,270.00	\$ 68,536.00	\$ 68,536.00
Total Yearly Increase	\$ 6,011.00	\$ 6,011.00	\$ 6,011.00	\$ 6,302.00	\$ 6,302.00
% increase	9%	9%	9%	9%	9%

SOCIAL WORKER SUPERVISOR I

CLASSIFICATION DEFINITION

Under general direction, the Social Worker Supervisor I plans, organizes and supervises social service and employment staff engaged in providing information and referral services, homemaker and chore services, adult protective services, in-home supportive services, home placement services, child protective services, emergency response services and/or employment services; performs other related work as assigned.

Social Worker Supervisor I is the first supervisory level in the series. Social Worker Supervisor I differs from the next lower classification of Social Worker IV in that the former is the first line supervisor. Social Worker Supervisor I differs from Social Worker Supervisor II in that the latter is at the second supervisory level and requires a Master's degree.

SUPERVISION EXERCISED AND RECEIVED

Incumbents in the Social Worker Supervisor I classification generally receive direction from a Program Manager or other management level classification. A Social Worker Supervisor I supervises a variety of Social Workers, clerical and technical staff, but generally does not supervise employees in the Social Worker IV classification.

TYPICAL DUTIES

Duties may include, but are not limited to, the following:

- Plans, assigns, supervises, and reviews the work of employees engaged in the delivery of employment and social services.
- Selects, trains, evaluates, and disciplines subordinate staff.
- Discusses or interprets regulations, rules, policies and programs to staff and the general public.
- Assists and participates in the development of in-service staff development programs.
- Authorizes the provision of social and employment services through the department, provides services, and makes referrals to other agency staff and community agencies.
- Enters and retrieves information from an automated computer system.
- Coordinates the activities of professional, technical and clerical staff.
- Supervises facilities and personnel providing day care services.
- Receives and prepares correspondence and prepare reports.
- In small agencies, may be responsible for social workers involved in the provision of the full range of social services including advanced services.
- Performs related duties as assigned.

EMPLOYMENT STANDARDS

Knowledge of:

- Functions of public social services agencies and the principles of public social service administration.
- Casework concepts, techniques of interviewing, and record keeping in social casework.
- Laws, rules, and regulations governing the operation of public social services agencies.
- Techniques of supervision, training, and casework consultation.
- Computer terminology and computer keyboard arrangement.
- Resources available in the community for referral or utilization in employment or social service programs.
- Principles, methods, and resources in the field of public health, mental hygiene, education, corrections and rehabilitation as they relate to public social services.

Ability to:

- Exercise sound judgment when organizing, directing, and prioritizing unit activities.
- Select, train, supervise, evaluate, and discipline subordinate staff.
- Apply effective interpersonal skills.
- Develop and maintain effective working relationships with agency staff, clients, and outside organizations.
- Present oral and written reports concisely and clearly.
- Analyze a situation accurately and adopt an effective course of action.
- Maintain confidentiality in accordance with legal standards and/or county regulations.
- Use computers and related software.

MINIMUM QUALIFICATIONS (Education and/or Experience)

EITHER

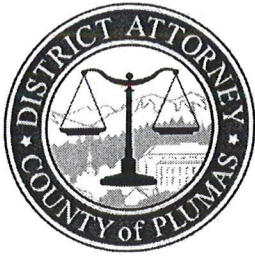
Two (2) years of full-time experience performing duties comparable to the Social Worker II classification. (One year of graduate work in social work or counseling may substitute for one year of the required experience.)

OR

One (1) year of full-time experience performing duties comparable to the Social Worker III classification.

DRIVER LICENSE REQUIREMENT

Some positions in this classification may require possession of a valid California driver's License. Employees who drive on County business to carry out job-related duties must possess a valid California driver's license for the class of vehicle driven and meet automobile insurability requirements of the County. Eligibility for employment for those who do not meet this requirement due to disability will be reviewed on a case-by-case basis by the appointing authority.



OFFICE OF THE DISTRICT ATTORNEY

David Hollister, District Attorney

520 Main Street, Room 404 • Quincy, California 95971
(530) 283-6303 • Fax (530) 283-6340

2C

Date: January 17, 2017
To: Plumas County Board of Supervisors
From: David Hollister, District Attorney
Subject: Overview and State of the District Attorney's Office

Recommendation:

Approval is requested for the Board to allow the District Attorney to present an overview and state of the District Attorney's Office. The District Attorney is not requesting any action be taken at this time.

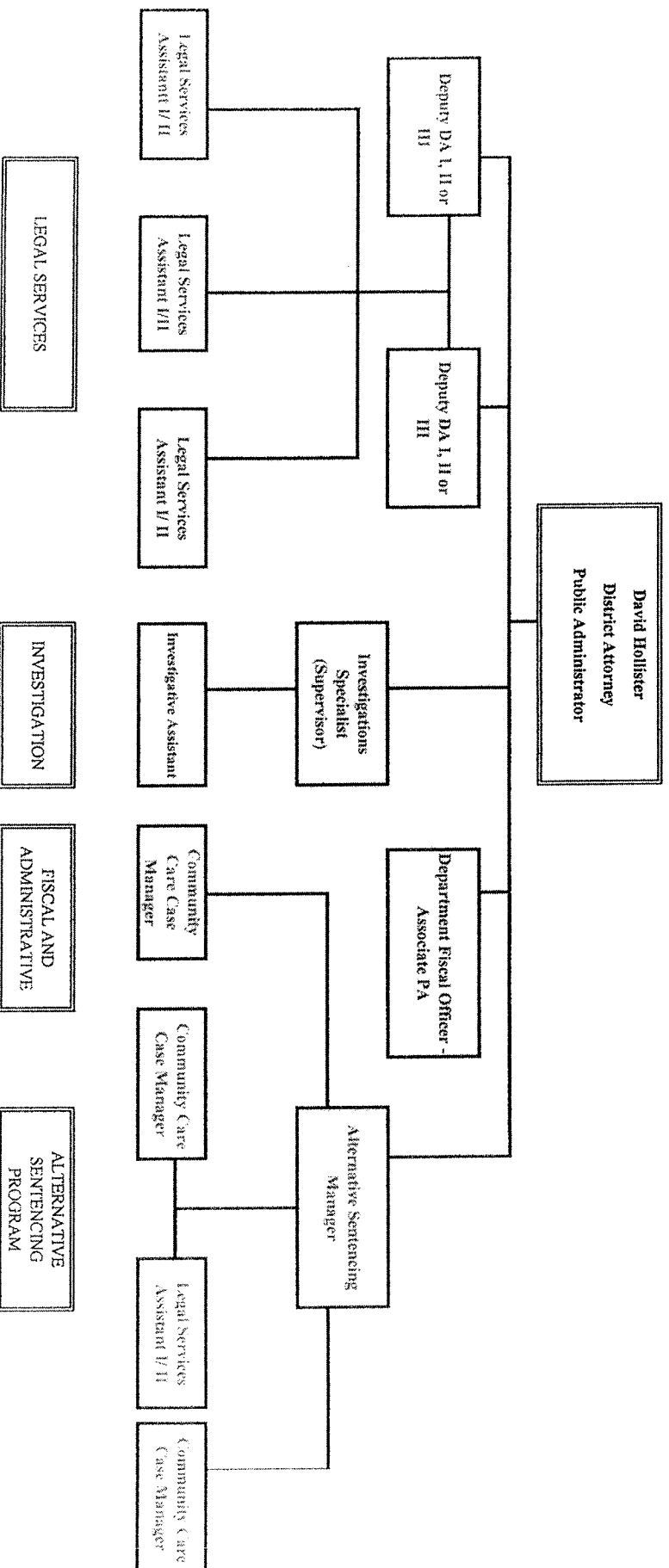
Background and Discussion:

The District Attorney's Office is requesting permission of the Board of Supervisors to offer a 20 minute presentation (with PowerPoint slides) concerning a general overview of the District Attorney's Office, an outline of new challenges in the criminal justice system and provide a road map outlining Plumas County's collaborative response to these challenges.

Thank you for your consideration.

Please allow the District Attorney to offer this presentation.

Plumas County District Attorney's Office Organizational Chart 2016-17



Office of the District Attorney



David Hollister, District Attorney

(530) 283-6303

davidhollister@countyofplumas.com

*To vigorously, fairly and compassionately
seek justice every day*

WHAT IS A DA / PROSECUTOR?

Prosecutors have a very unique role: Prosecutors represent society—all of the members of society, including victims and defendants. In this regard, prosecutors have a duty to ensure the fairness of criminal proceedings.

The United States Supreme Court noted in *Berger v. United States*:

[The prosecutor] is the representative not of an ordinary party to a controversy, but of a sovereignty whose obligation to govern impartially is as compelling as its obligation to govern at all; and whose interest, therefore, in a criminal prosecution is not that it shall win a case, but that justice shall be done.

CONSTITUTIONAL / STATUTORY IMPORTANCE OF DA

California Constitution Art. XIII, sec. 35

"Public safety is the first responsibility of local government"
"local officials have an obligation to give priority to the provision of adequate public safety resources"

Gov't Code § 25303

"This section shall not be construed to affect the independent and constitutionally and statutorily designated investigative and prosecutorial functions of the District Attorney"
"The Board of Supervisors shall not obstruct the investigative and prosecutorial function of the District Attorney"

Plumas County / State Agencies We Directly Impact

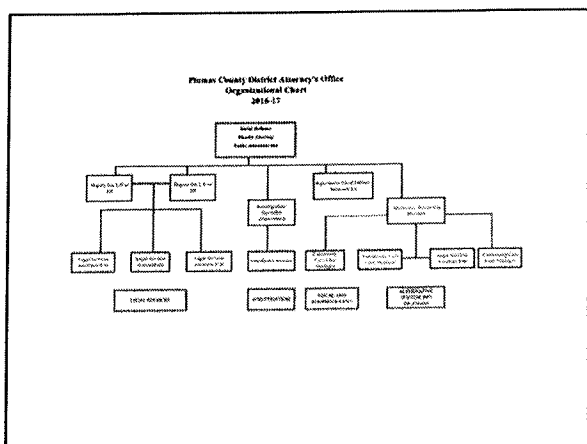
Contract Attorneys
Retained Attorneys
Superior Court
Jail
Probation



Plumas County / State / Federal Referral Agencies

Plumas Co. Sheriff
PCDA Invest.
CHP
Fish and Game
Forest Service
Union Pacific RR
FBI
DOJ - BNE
Soc. Serv. -- Welfare Fraud
Numerous Other
County/State/Federal Agencies
(Prob, Parole)

Providing Prosecution Services for District, County,
State and Federal Agencies



DUTIES OF THE DISTRICT ATTORNEY

Primary Responsibility

Investigate and Prosecute Crime

Secondary Responsibility

Investigation

Grand Jury

Victim/Witness Services

Court Operations

Juvenile Matters

Parental Child Abduction

Official Misconduct

Consumer and Environmental Protection

Welfare Fraud

Administrative Services



REQUISITE LEGAL KNOWLEDGE

Criminal Law

Evidentiary Law

Trial Practice

Environmental Law

Consumer Protection Law

International Law

Family Law

Estate Law

Contract Law

Etc.

INVESTIGATE &
PROSECUTE CRIMINAL
OFFENSES

ROLE IN CASES

Investigate
 Charging Decision
 Court Hearings
 Resolution
 Evidential Motions
 Trial
 Sentencing
 Appeal
 Lifer / Parole Letters and Hearings

24/7/365 Job
Trial Preparation
Warrants
On-call

TYPES OF CASES

Murder of a 22 month old child
 "Stand Your Ground" Murder on National TV
 Meth-induced rage killing of local business woman
 Extradition of a murder suspect from Peru
 Embezzlement of Private/Public Funds
 Residential burglaries
 Commercial burglaries
 Auto burglaries
 Trafficking of Methamphetamine / Heroin / Prescription Pills
 Domestic Violence
 Felony DUI / Vehicular Manslaughter
 Assault with Great Bodily Injury
 Etc.

**ZERO Reversals Since
 Taking Office**

WALLIN-REED GUILTY OF FIRST-DEGREE MURDER

10/4/2013

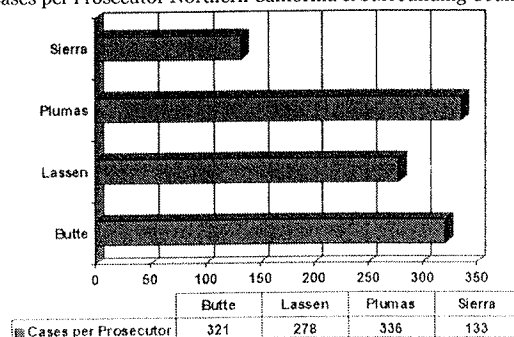
On Thursday, Sept. 26, a jury found the 38-year-old Reno man guilty of murder and seven other felonies stemming from a car chase that ended in a hail of bullets from Wallin-Reed's AR-15 assault rifle. Gregory Chad Wallin-Reed will likely spend the rest of his life in prison for the July 2011 shooting death of Rory McGuire.



District Attorney David Hollister holds the assault rifle used by Gregory Chad Wallin-Reed in the shooting death of Rory McGuire of Susanville

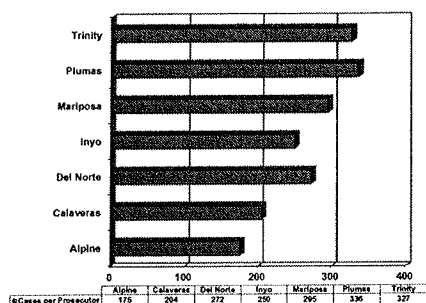
After hearing nearly a month of testimony, the jury (10 women and two men) took just three hours to find the defendant guilty of first-degree murder.

Cases per Prosecutor Northern California & Surrounding Counties



2011

Cases per Prosecutor Small California Counties



INVESTIGATION

Officer Involved Shootings
 OSHA Violations
 Train Accidents
 Embezzlement Cases
 Public Corruption
 Gov't Employees
 Etc.

PLUMAS COUNTY DEPUTY KILLS HOSPITAL PATIENT AFTER VIOLENT STRUGGLE

OCT. 22, 2013

PORTOLA -- A Plumas County sheriff's deputy shot and killed a patient at Eastern Plumas District Hospital in a violent confrontation that moved from the acute-care section into the hospital lobby, officials said Monday.

"It was an all-out, life-and-death struggle that resulted in the officer resorting to deadly force," said Plumas County Sheriff Greg Hagwood.



Officer involved shooting at Eastern Plumas District Hospital in Portola.

OFFICER INVOLVED SHOOTING AND FIRE IN QUINCY 6/20/2012

Victim threatened to go on 'murder spree'

According to a press release issued Wednesday afternoon, June 20, by Plumas County District Attorney Dave Hollister, the man shot and killed by a Plumas County sheriff's deputy Tuesday evening had threatened to go on a "murder spree."

Hollister said the Plumas County Sheriff's Office dispatch center received a call at 3:53 p.m. Tuesday reporting a man "acting erratically and threatening others while armed with a knife and a brick hammer." A deputy was dispatched.



Officer involved shooting and fire incident in Evergreen Trailer Park, Quincy, CA

Changing and Challenging Times

“SEA CHANGE” IN CRIMINAL JUSTICE

2011 – AB109 – Shifting State
Responsibilities to Counties

2014 – Prop 47 – Reducing Drug and
Theft Offense from Felonies to
Misdemeanor

2016 – Prop 57 – Allowing for Early
Parole of Serious Offenders

DISTRICT ATTORNEYS ARE SUBJECT TO INTENSE SCRUTINY

In fulfilling their duties to the public prosecutors may face:

- Pressure to resign from office
- Discipline by the California Bar
- Disbarment (lose their license to practice law)
- Imprisonment (AB 1909 – Signed 9/30/16)

Get it Right,
Every Time

PROSECUTORS RISK THEIR LIVES TO SERVE THE PUBLIC

Texas Triple Murder: Woman Arrested for Role in Death of District Attorney, Wife and Assistant D.A.

April 17, 2013.

The wife of a former justice of the peace in Kaufman, Texas has been charged with capital murder after she reportedly confessed to her role in the killing of a district attorney and his wife last month and the earlier killing of an assistant district attorney, according to an arrest warrant.

Officials say that she confessed to her role in the murders of District Attorney Mike McLelland, his wife Cynthia on March 30, and of Assistant District Attorney Mark Hasse on January 31. She has allegedly admitted that she helped her husband, Eric Lyle Williams, also 46, to plot the murders and that her husband was the shooter.



Home of Kaufman County District Attorney Mike McLelland

Explosion Reported Near District Attorney's Office In Oregon

11/13/13



Photo By Bob Peneill/AP

FBI agents examine an improvised explosive device that was placed in front of the Jackson County District Attorney's Office and set off, causing an explosion that shattered windows and damaged the building's interior.

MEDFORD, Ore. (AP) — An explosive device that went off before dawn Wednesday and damaged the Jackson County prosecutor's office in Medford, Ore., appeared to be a failed attempt to level the building, a police spokesman said.

The device shattered windows and damaged mainly the exterior of the building, said Lt. Mike Budreau of the Medford police. Nobody was hurt.

"I think that it's safe to assume that had this bomb went off as it was intended to, it would have most likely destroyed most of the building, and we believe that was the intent of the suspect," Budreau told the Medford Mail Tribune.

SIX DEGREES OF SEPARATION

LIFE AS A PROSECUTOR IN A SMALL COMMUNITY



CHANGES IN PLUMAS CO. LEGAL COMPENSATION

2007		2017
95,724	District Attorney	95,724
82,008	County Counsel	168,000
78,673	Public Defender	95,724

Former Plumas Co DDA Hired by Placer Co after 1+ yrs in Plumas Co DA's Office at a Salary \$5,000 more than the Plumas Co. DA (20+ yrs exp)

DA'S OFFICE TRANSITION

2007		2017
10+	DA	25
10+	DDA	6 (law school)
10+	DDA	2 (law school)

Training for Past 6 years

ADDRESSING TODAY'S CRIMINAL JUSTICE CHALLENGES

Alternative Sentencing Program

(soon - Community Justice Services)

Coordination / Liaison

Court, Parties and Service Providers

Day Reporting Center

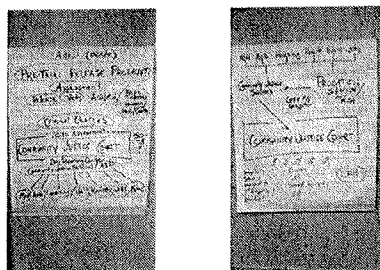
Case Management Services

Vocational Training

Drug Court (Community Justice Court)

Pretrial Release Program

ROAD MAP





DEPARTMENT OF FACILITY & AIRPORT SERVICES

198 ANDY'S WAY, QUINCY, CALIFORNIA 95971-9645
(530) 283-6299 FAX: (530) 283-6103

2D

Dony Sawchuk
Director

Board Meeting: January 17, 2017

To: The Honorable Board of Supervisors

From: Dony Sawchuk, Director

Subject: **Authorized the purchase of one used 2009 Service Truck, Ford F350, 4-Wheel Drive, Utility Service Body at \$24,267 and authorize the Director of Facility and Airport Services to sign all related documents. Price includes all State documentation, fees, tax and licensing.**

Background

Facility Services has found a used, well maintained service vehicle for purchase by the department. A CarFax report was generated and showed the vehicle to be in very good condition, free of accidents and damage and had a comprehensive service record for regular maintenance. Facility Services has completed a thorough search for the right vehicle using vehicle cost and condition as a factor and has kept within its allotted budget for purchase. We believe we have found a vehicle well suited for our use and at the best possible price for its condition. The cost for a new model service vehicle similarly equipped is approximately \$58,000.

Recommendation

Authorized the purchase of one used 2009 Service Truck, Ford F350, 4-Wheel Drive, Utility Service Body at \$24,267 and authorize the Director of Facility and Airport Services to sign all related documents. Price includes all State documentation, fees, tax and licensing.

Purchase agreement has been reviewed by County Counsel



Plumas County Public Health Agency

270 County Hospital Road, Quincy, California 95971

2E1,2,3

Mimi Khin-Hall, MPH, CHES, Director

<input type="checkbox"/> Administration & Health Education Suite 206 Quincy, CA 95971 (530) 283-6337 (530) 283-6425 Fax	<input type="checkbox"/> Clinic & Nursing Services Suite 111 Quincy, CA 95971 (530) 283-6330 (530) 283-6110 Fax	<input type="checkbox"/> Senior Nutrition & Transportation Suite 206 Quincy, CA 95971 (530) 283-3546 (530) 283-6425 Fax	<input type="checkbox"/> Veteran's Services Office Suite 206 Quincy, CA 95971 (530) 283-6275 (530) 283-6425 Fax
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Date: January 9, 2017

To: Honorable Board of Supervisors

From: Mimi Khin Hall

Agenda: Board Item for January 17, 2017

Item Description/Recommendation:

- Approve a Supplemental Budget to Public Health 70566 in the amount of \$10,642.00 for unanticipated revenues from the California Department of Public Health (CDPH) Emergency Preparedness Office (EPO) Public Health Emergency Preparedness.
- Approve a Budget Transfer in Public Health 70566, which includes a transfer redirecting grant expenditures in the amount of \$33,498.00, based on final approved budget for CDPH EPO Public Health Emergency Preparedness.
- Approve a Supplemental Budget of available Fund Balance from FY 15/16 to Public Health 70560 in the amount of \$230,134.00 for salaries due to nursing position increases.

History/Background: As the Board will recall Plumas County Public Health Agency (PCPHA) submits a projected budget to the county for each fiscal year, as many grant programs do not finalize allocations and approve budgets for programs until well into the county fiscal year. Adjustments to the PCPHA budget occur each fiscal year to bring the county budget in line with later approved state budgets.

The Board was made aware that as soon as the state approved pending budget requests for this grant, PCPHA would submit appropriate Supplemental Budget in the amount of \$10,642.00 and Budget Transfer in the amount of \$33,498.00 to bring these county budget units in line with grant budget approvals.

The Supplemental Budget in 70560 in the amount of \$230,134.00 corrects FY16-17 budgeted line items in wages and benefits, following approval by the Board in October to bring nursing salaries in line with like counties and employers. These funds were available at the beginning of the fiscal year, but could not be budgeted until salary adjustments were approved.

Please contact me should you need additional information.

Thank You.

COUNTY OF PLUMAS
REQUEST FOR BUDGET APPROPRIATION TRANSFER
OR SUPPLEMENTAL BUDGET

TRANSFER NUMBER

(Auditor's Use Only)

Department: **Hospital Preparedness** Dept. No. **70566** Date **12/29/2016**

The Reason for this request is (check one):

Approval Required

- A. ☐ Transfer to/from Contingencies OR between Departments
B. ☒ Supplemental Budgets (including budget reductions)
C. ☐ Transfers to/from or new Fixed Asset, out of a 51XXX
D. ☐ Transfer within Department, except fixed assets, out of 51XXX
E. ☐ Establish any new account except fixed assets

Board
Board
Board
Auditor
Auditor

☐ **TRANSFER FROM OR**

☒ **SUPPLEMENTAL REVENUE ACCOUNTS**

UNBUDGETED REVENUE)

FUND #	DEPT #	ACCT #	NAME OF BUDGET ITEM	\$ AMOUNT
0015P	70566	44141	State-Aid Health Categorical Programs	\$ 10,642.00
			Total (must equal transfer total)	\$ 10,642.00

☐ **TRANSFER TO OR**

☒ **SUPPLEMENTAL EXPENDITURE ACCOUNTS**

CHECK "TRANSFER FROM" IF TRANSFER WITHIN EXISTING BUDGET, CHECK "SUPPLEMENTAL REVENUE" IF SUPPLEMENTAL, NEW UNBUDGETED REVENUE)

FUND #	DEPT #	ACCT #	NAME OF BUDGET ITEM	\$ AMOUNT
0015P	70566	521900	Professional Services	\$ 10,642.00
			Total (must equal transfer total)	\$ 10,642.00

Supplemental budget requests require Auditor/Controller's signature

Please provide copy of grant award, terms of award, proof of receipt of additional revenue, and/or backup to support request.

In the space below, state (a) reason for request, (b) reason why there are sufficient balances in affected accounts to finance transfer, (c) why transfer cannot be delayed until next budget year (attach memo if more space is needed) or (d) reason for the receipt of more or less revenue than budgeted.

(A) State Emergency Preparedness Office allowed us to rollover unused funds from 2015/16 which amounted to \$10,642.

(B) N/A

C Grant term this fiscal year

(D) See above

Approved by Department Signing Authority:

Debbie Peluse

☒ Approved/Recommended

☐ Disapproved/Not recommended

Auditor/Controller Signature:

John M. M.

Board Approval Date: _____

Agenda Item No. _____

Clerk of the Board signature: _____

Date Entered by Auditor/Controller _____

Initials _____

INSTRUCTIONS:

Original and 1 copy of ALL budget transfers go to Auditor/Controller. If supplemental request, they must go to the Auditor/Controller. Original will be kept by Auditor. Copies returned to Department after it is entered into the system.

Supplemental transfer must have Auditor/Controllers signature. Auditor/Controller will forward all signed, supplemental transfers to the Board for approval.

If one copy of agenda request and 13 copies of Board memo and backup are attached, the entire packet will be forwarded, after all signatures are obtained, to the Clerk of the Board. If only the budget form is sent, it will be returned to the Department after all signatures are obtained.

Transfers that are going to be submitted to the Board for approval:

A. Must be signed by the Auditor/Controller; if supplemental must be signed by the Auditor/Controller.

COUNTY OF PLUMAS
REQUEST FOR BUDGET APPROPRIATION TRANSFER
OR SUPPLEMENTAL BUDGET

TRANSFER NUMBER
(Auditor's Use Only)

Department: **Hospital Preparedness** Dept. No. **70566** Date **12/29/2016**

The Reason for this request is (check one):

- A. _____ Transfer to or from Contingencies
B. _____ Supplemental Budgets (including budget reductions)
C. ☒ Transfers to/from or new Fixed Asset, within a 51XXX
D. _____ Transfer within a department, except fixed asset
E. _____ Establish any new account except fixed assets

Approval Required
Board
Board
Board
Auditor
Auditor

☒ **TRANSFER FROM OR**

☐ **SUPPLEMENTAL REVENUE ACCOUNTS**

CHECK "TRANSFER FROM" IF TRANSFER WITHIN EXISTING BUDGET, CHECK "SUPPLEMENTAL REVENUE" IF SUPPLEMENTAL, NEW UNBUDGETED REVENUE)

FUND #	DEPT #	ACCT #	NAME OF BUDGET ITEM	\$ AMOUNT
0015P	70566	524771	Bio Equipment	\$ 3,072.00
0015P	70566	527380	Non Employee Travel	\$ 3,700.00
0015P	70566	51000	Regular Wages	\$ 20,000.00
0015P	70566	51080	Retirement	\$ 4,000.00
0015P	70566	51090	Group Insurance	\$ 2,000.00
0015P	70566	51100	FICA	726.00
Total (must equal transfer to total)				\$ 33,498.00

☒ **TRANSFER TO OR**

☐ **SUPPLEMENTAL EXPENDITURE ACCOUNTS**

CHECK "TRANSFER TO" IF TRANSFER WITHIN EXISTING BUDGET, CHECK "SUPPLEMENTAL REVENUE" IF SUPPLEMENTAL, NEW UNBUDGETED REVENUE)

FUND #	DEPT #	ACCT #	NAME OF BUDGET ITEM	\$ AMOUNT
0015P	70566	521900	Professional Services	\$ 33,498.00
Total (must equal transfer to total)				\$ 33,498.00

Supplemental budget requests require Auditor/Controller's signature _____

Please provide copy of grant award, terms of award, proof of receipt of additional revenue, and/or backup to support

In the space below, state (a) reason for request, (b) reason why there are sufficient balances in affected accounts to finance transfer, (c) why transfer cannot be delayed until next budget year (attach memo if more space is needed) or (d) reason for the receipt of more or less revenue than budgeted.

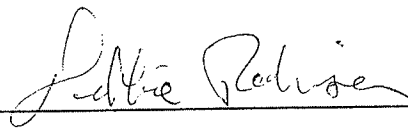
(A) Redirecting grant expenditures

(B) Shifting budgeted expenses

C 2016/17 expenses

(D) N/A

Approved by Department Signing Authority:



_____ Approved/Recommended

_____ Disapproved/Not recommended

Auditor/Controller Signature: _____

Board Approval Date: _____

Agenda Item No. _____

Clerk of the Board signature: _____

Date Entered by Auditor/Controller _____

Initials _____

INSTRUCTIONS:

Original and 1 copy of ALL budget transfers go to Auditor/Controller. If supplemental request, they must go to the Auditor/Controller. Original will be kept by Auditor. Copies returned to Department after it is entered into the system.

Supplemental transfer must have Auditor/Controllers signature. Auditor/Controller will forward all signed, supplemental transfers to the Board for approval.

If one copy of agenda request and 13 copies of Board memo and backup are attached, the entire packet will be forwarded, after all signatures are obtained, to the Clerk of the Board. If only the budget form is sent, it will be returned to the Department after all signatures are obtained.

Transfers that are going to be submitted to the Board for approval:

A. Must be signed by the Auditor/Controller; if supplemental must be signed by the Auditor/Controller.

COUNTY OF PLUMAS
REQUEST FOR BUDGET APPROPRIATION TRANSFER
OR SUPPLEMENTAL BUDGET

TRANSFER NUMBER

(Auditor's Use Only)

Department: **Public Health**

Dept. No. **70560**

Date **1/4/2017**

The Reason for this request is (check one):

- A. ☐ Transfer to/from Contingencies OR between Departments
B. ☒ Supplemental Budgets (including budget reductions)
C. ☐ Transfers to/from or new Fixed Asset, out of a 51XXX
D. ☐ Transfer within Department, except fixed assets, out of 51XXX
E. ☐ Establish any new account except fixed assets

Approval Required

Board
Board
Board
Auditor
Auditor

☐ **TRANSFER FROM OR**

☒ **SUPPLEMENTAL REVENUE ACCOUNTS**

UNBUDGETED REVENUE)

FUND #	DEPT #	ACCT #	NAME OF BUDGET ITEM	\$ AMOUNT
0015	70560	10100	Fund Balance Rolled Over from 15/16	\$ 230,134.00
			Total (must equal transfer total)	\$ 230,134.00

☐ **TRANSFER TO OR**

☒ **SUPPLEMENTAL EXPENDITURE ACCOUNTS**

CHECK "TRANSFER FROM" IF TRANSFER WITHIN EXISTING BUDGET, CHECK "SUPPLEMENTAL REVENUE" IF SUPPLEMENTAL, NEW UNBUDGETED REVENUE)

FUND #	DEPT #	ACCT #	NAME OF BUDGET ITEM	\$ AMOUNT
0015	70560	51000	Regular Wages	\$ 151,826.00
0015	70560	51080	Retirement	\$ 25,380.00
0015	70560	51090	Group Insurance	\$ 38,296.00
0015	70560	51100	FICA	\$ 14,632.00
			Total (must equal transfer total)	\$ 230,134.00

Supplemental budget requests require Auditor/Controller's signature

Please provide copy of grant award, terms of award, proof of receipt of additional revenue, and/or backup to support request.

In the space below, state (a) reason for request, (b) reason why there are sufficient balances in affected accounts to finance transfer, (c) why transfer cannot be delayed until next budget year (attach memo if more space is needed) or (d) reason for the receipt of more or less revenue than budgeted.

(A) Agency salaries were never reconciled with HR at budget time due to nursing increases happening in Oct. This is to put salary budget in place to cover FY 2016/17.

(B) N/A

C Grant term this fiscal year

(D) See above

Approved by Department Signing Authority:

Patricia Robison

☒ Approved/Recommended

☐ Disapproved/Not recommended

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John Miller

Board Approval Date: _____

Agenda Item No. _____

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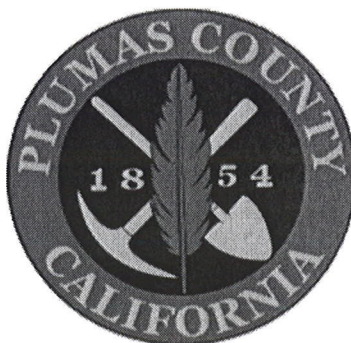
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Transfers that are going to be submitted to the Board for approval:

A. Must be signed by the Auditor/Controller; if supplemental must be signed by the Auditor/Controller.

JE4

2016-
2021



Plumas County Public Health Agency Strategic Plan (2016-2021)

Submitted June 30, 2016

By



Acknowledgements

Producing this Strategic Plan (2016-2021) would not have been possible without the support and participation of numerous individuals who contributed to this report through numerous discussions and draft reviews.

Public Health Management Team

Special acknowledgement goes to the Public Health staff who guided the design of all planning retreats and engaged their Divisions to identify the goals and objectives for this Strategic Plan.

- Andrew, Woodruff, Health Education Division Program Chief
- Debbie Robinson, Department Fiscal Officer II
- Karla Burnworth, Assistant Director
- Mimi Hall, Director
- Tina Venable, Director of Nursing
- Zach Revene, Health Education Coordinator II

Ellis Planning Associates Team

The development of this strategic plan was facilitated by Ellis Planning Associates, Inc.

- Galen Ellis, President
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- Shannon Eli, General Manager

Ellis Planning Associates, Inc. is an established team of strategic planning, community health, evaluation, program development, and training consultants, specializing in building the capacities of organizations and individuals in the public, non-profit, philanthropic, and small business sectors. More information on Ellis Planning Associates is available at www.ellisplanningassociates.com

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Message from the Director

At the Plumas County Public Health Agency, we have an opportunity to map out a course, in partnership with our entire community, towards a shared vision of a healthy, safe and vibrant Plumas County. Communities are not just residents who live together in the same neighborhood. Communities are groups of people who work together for a common good. We recognize that we are a part of numerous, cross sector efforts working towards a better Plumas County.

The 2016-2019 Strategic Plan is PCPHA's roadmap to proactively participate in our community's journey towards improved community health. After carefully assessing the social and environmental conditions in our communities and identifying health priorities with our residents and partners, we have outlined the steps and measures that will continuously lead the health department towards a singular vision: Plumas County is home to the healthiest and happiest people in the nation, who have strong social connections and work together for a better community.

Looking forward, the role of public health at the local level is shifting. We are deeply focused on addressing the underlying causes of the health challenges of tomorrow. Recognizing that the health care needs of the population are changing, the demographics of our county continue to change over time, and addressing all of the determinants of health requires alliances with health and non-health sectors, PCPHA looks forward to playing a vital role in reorientation of the broader local system toward prevention and wellness.

Through the strategic planning process, we have embraced our role in the broader context of a healthy Plumas County. We have developed long term goals and objectives, and identified the specific actions and processes that will help us achieve them. Our Values, which include humility, accountability, and compassion, are the daily inspirations that guide our efforts. The Strategic Plan will guide our decision-making, from developing programs to allocating resources, in a manner that keeps us on course to continuously pursue our Vision and Mission in every area of our work.

I look forward to working with the entire staff of PCPHA to implement the Strategic Plan, ensuring the community is served well through efforts that are thoughtfully addressed in a comprehensive and coordinated manner.

Mimi Khin Hall

Public Health Director

PCPHA Vision, Mission and Values Statements

Vision

Plumas County is home to the healthiest and happiest people in the nation, who have strong social connections and work together for a better community.

Mission

The mission of the Plumas County Public Health Agency is to promote and protect individual and community health and well-being. We do this through innovative partnerships, public planning and policy, and ensuring access to respectful services.

Values

These values reflect the guiding principles that inform how we work toward our collective vision with each other, our community partners, and the residents we serve.

Values	Value Statements
Honesty and Integrity	We commit to honesty and integrity in our interactions with others, and maintain transparency in our organization.
Relationships	We believe that our respectful connections to individuals, families, and the community as a whole are the foundation of community health and strength.
We Care	We act from compassion, kindness and respect and recognize how important it is to support and sustain each other.
Accountability	We hold ourselves accountable to being dependable, reliable and professional.
Positivity	We foster positivity and value humor in our workplace and the community.
Collective Impact	We recognize that we are stronger together and seek to draw on the unique strengths of our co-workers and community partners.
Empowerment through Information	We provide quality information and education to empower our whole community.
Innovation	We welcome and are passionate about change; are willing to go above and beyond; and are open to new ways of approaching solutions.

Humility and Inclusivity	We remain open-minded and non-judgmental; seeking to understand, accept, and assist each other regardless of any door a person walks through.
Communication	We remember to actively listen, communicate transparently, and honor confidentiality.

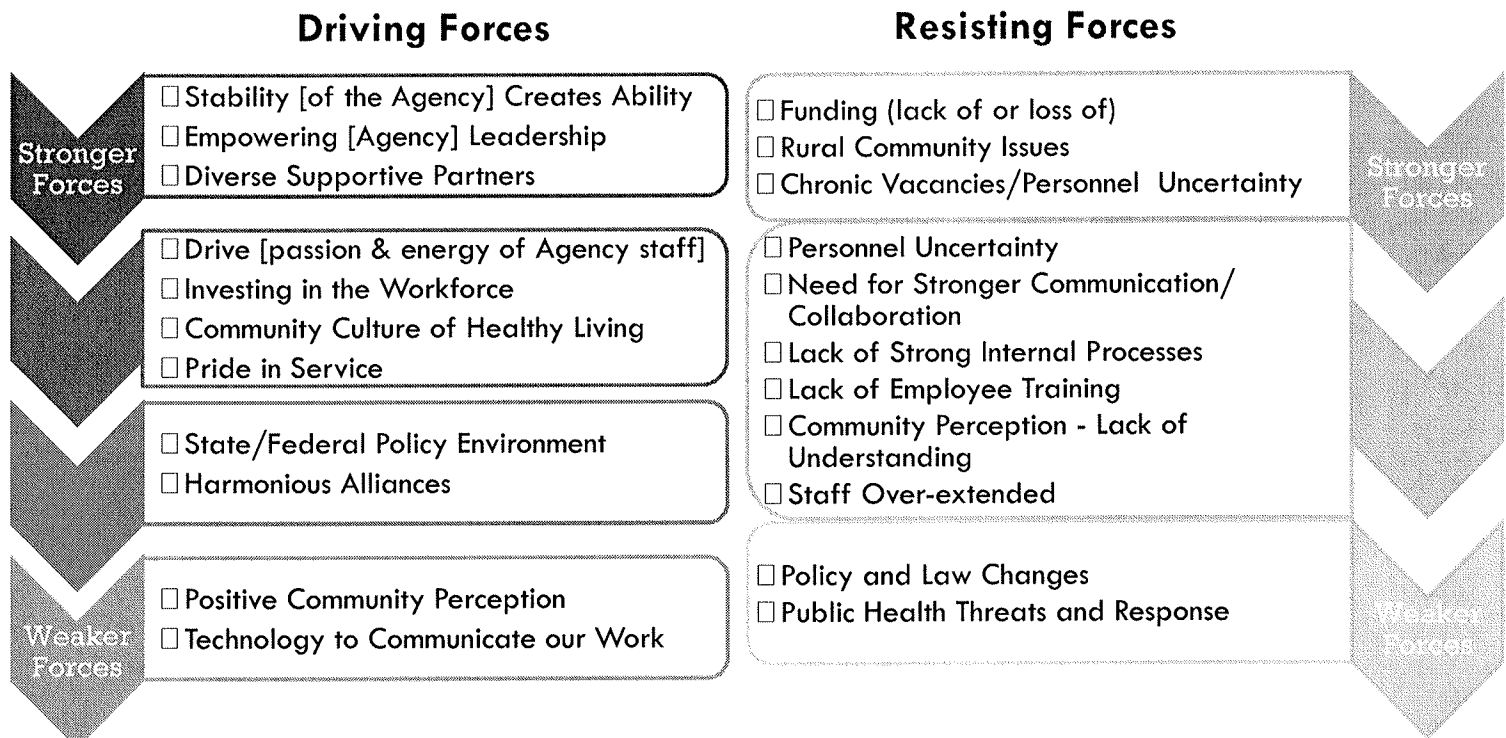
Overview of Strategic Planning Process

The PCPHA strategic planning process consisted of conducting a two-part SWOT Analysis (identification of strengths, weakness, opportunities, and threats); updating the PCPHA's vision, mission, and values; identifying broad strategic directions; and developing goals, objectives, activities, and timeframes. The process took place over a six-month period, and utilized an outside consultant to facilitate collaborative decision-making. The consultant met regularly with a Planning Team, made up of agency leaders, to design the strategic planning process and develop the design of two daylong workshops for Agency staff and a representative of the department's governing entity. The following steps were implemented:

Timeframe	Strategic Planning Step	Meetings and Method of Review
March-April 2016	Division identification of Strengths, Weakness, Opportunities and Threats (SWOT)	Three mini-strategic planning sessions for each PCPHA Division (Clinic and Nursing, Fiscal & Administrative, and Health Education) to detail strengths, weaknesses, opportunities and threats; and to identify preliminary goals.
May 2016	Update of Vision, Mission, Values	Agency-wide day-long retreat facilitated by an outside consultant to update the PCPHA's vision, and mission, and values to better reflect the identity of the department to the public as well as to affirm the work that is conducted by staff.
May 2016	Identification of Strategic Directions	Agency-wide day-long retreat facilitated by an outside consultant to apply SWOT data to conduct an analysis of driving and resisting forces for achieving the PCPHA vision, and to identify its broad strategic directions.
June-August 2016	Development of Goals, Objectives, Activities, and Timeframes	Two Strategic Plan Workgroup meetings for staff to work to develop goals, objectives, strategies and timeframes for each strategic direction.

Strategic Directions and Action Plan (Goals, Objectives and Strategies)

Appendix A includes the outcomes of the mini-strategic planning sessions held in each of the Agency's three Divisions, namely SWOT findings and preliminary thinking about goals in each one. In an agency-wide workshop, staff analyzed those early findings and identified the overall driving and resisting forces that were helping or hindering the agency in achieving its vision, then came to consensus on innovative, substantial actions that would deal with the underlying contradictions (resisting forces) and move the agency toward its vision (driving forces).



Priority Actions

The Workshop question that was answered through a consensus process was, “*What innovative, substantial actions will deal with the underlying contradictions and move us toward our vision?*” Participants brainstormed answers to this question, then grouped their ideas into clusters. These clusters were then given the following labels (full results are included in Appendix B):

- Active Recruitment
- Creating a Premier Workplace
- Ensure a Highly Competent Workforce

- Strengthening Internal Efficiencies
- Formalize Mission-Driven Financial Plan
- Engage & Empower Community Across the Spectrum of Prevention
- Promoting the Face of Public Health
- Broader Infrastructure Planning

From the priority actions, staff later identified three broad Strategic Priority Areas:

1. Organizational Excellence
2. Improve Quality of Life
3. Collaborate to Improve Community Health and Well-Being

Action Plan

The following Action Plan integrates all the work of the mini-strategic planning sessions and the agency-wide retreats into goals, objectives, and strategies for each of the Strategic Priority Areas.

Strategic Priority Area #1: Organizational Excellence	
Goal #1: Strengthen Operational Efficiencies	
Objectives	Strategies
Objective 1.1 – Ensure a mission driven financial system that supports PH capacity, sustainability and growth.	Strategy 1.1.1 – By June 2017, develop a formal process to monitor and adjust department-wide budget.
	Strategy 1.1.2 – By June 2017 and ongoing, increase communication and contact with the Board to improve board members' knowledge, awareness, and ability to influence all factors that affect local health jurisdiction funding.
Objective 1.2 - Maintain and improve department information management.	Strategy 1.2.1 – By June 2020, improve and streamline EMR implementation and use.
	Strategy 1.2.2 – By June 2018, develop and implement a formal process to monitor and evaluate department technological needs.

	Strategy 1.2.3 – By June 2017 and ongoing, increase the utilization and usability of department shared network.
Objective 1.3 - Strengthen operational infrastructure to facilitate organizational continuity.	Strategy 1.3.1 – By June 2017, review, update, and implement departmental policies and procedures.
	Strategy 1.3.2 – By June 2018, increase staff understanding of and inclusion in the Emergency Preparedness Continuity of Operations Plan.
	Strategy 1.3.3 – By June 2019, identify departmental continuity of operations strategies that address succession planning, including programmatic and financial knowledge.
Goal #2: Create a Premiere Workplace	
Objective 2.1 – Ensure a stable and highly competent workforce	Strategy 2.1.1 – By June 2017 and ongoing, implement newly developed workforce development plan.
	Strategy 2.1.2 – By June 2018, identify and implement departmental strategies to actively recruit competent and highly trained staff.
	Strategy 2.1.3 – By June 2017 and ongoing, identify, analyze, and adjust factors that increase our ability to become a choice place of employment, such as employee compensation.
	Strategy 2.1.4 – By June 2017, develop orientation and training guidelines to include Public Health competencies.
	Strategy 2.1.5 – By June 2018, assess information technology training needs of all staff.
	Strategy 2.1.6 – By July, 2016, dedicate time and money for staff professional development.
Objective 2.2 - Ensure a workplace environment that is balanced and embodies a culture of health and well-being.	Strategy 2.2.1 – By June 2017, create and implement an annual employee satisfaction survey.

	Strategy 2.2.2 – By June 2018, develop a regular employee feedback mechanism.
	Strategy 2.2.3 – By July 2016, develop and annually assess a formal employee recognition program.
	Strategy 2.2.4 – By June 2019, launch staff wellness policy/program.
Objective 2.3 - Integrate quality improvement and performance management into all programmatic and operational aspects of the department.	Strategy 2.3.1 – By June 2017, implement Quality Improvement Plan, including creation of QI team.
	Strategy 2.3.2 – Annually provide staff training on quality improvement and performance management.
	Strategy 2.3.3 – By June 2021, integrate the use of the performance management system into all levels of department operations.
Objective 2.4 - Ensure effective communication within the department and the county system of partners that impact Public Health operations.	Strategy 2.4.1 – By January 2018, complete a baseline communications needs assessment for the department.
	Strategy 2.4.2 – By June 2018, create and implement department-wide communication guidelines, including the effective use of department branding.

Strategic Priority Area #2: Improve Quality of Life

Goal #1: Ensure a bridge to respectful services that support and improve individual and population health.

Objectives	Strategies
Objective 1.1 – Assess new and existing programs to ensure the inclusion of the social determinants of health.	Strategy 1.1.1 – By March 2017, review developing Opiate, Dental, and OER programs to include activities and budgeted items that address the social determinants of health and barriers to care.

Objective 1.2 – Ensure enrollment of eligible applicants into MediCal, CMSP, and Covered California.	Strategy 1.2.1 – By June 2017 and ongoing, improve county-wide service provider outreach and enrollment capacity for MediCal, CMSP and Covered California.
Objective 1.3 - Ensure access to medical and dental homes to provide continuity of care and timely preventative services.	Strategy 1.3.1 – Annually work with hospitals, dental providers, and Social Services to identify vulnerable populations.
	Strategy 1.3.2 – Continuously provide care coordination and case management services to eligible clients.
Goal #2: Promote Healthy Lifestyles and Environments	
Objective 2.1 – Engage people where they are.	Strategy 2.1.1 – By June 2017 and ongoing, ensure culturally and linguistically appropriate services.
	Strategy 2.1.2 – By June 2017 and ongoing, prioritize place-based services to address the Social Determinants of Health.
	Strategy 2.1.3 – By June 2017 and ongoing, improve county-wide service provider capacity to provide harm reduction and strength-based services to clients.
	Strategy 2.1.4 – By June 2018, provide harm reduction and strength-based services to Public Health clients.
Objective 2.2 – Engage and empower communities across the spectrum of prevention.	Strategy 2.2.1 – By June 2021, increase education about and access to nutritious, affordable, and culturally appropriate food choices.
	Strategy 2.2.2 – By June 2021, decrease tobacco use in Plumas County by reducing health disparities and changing cultural norms through education and public policy.
	Strategy 2.2.3 – By June 2021, create a comprehensive system of harm reduction and treatment services for individuals experiencing opiate addiction.

	<p>Strategy 2.2.4 – By June 2021, actively engage youth from throughout Plumas County in efforts to reduce underage drinking, youth marijuana use and youth prescription drug misuse.</p> <p>Strategy 2.2.5 – By June 2021, increase outreach to populations at high risk for acquiring or transmitting HIV and Hepatitis C.</p>
Goal #3: Improve Client Customer Service	
Objective 3.1 – Improve Public Health staff awareness and knowledge of community services and supports.	<p>Strategy 3.1.1 – Annually update Public Health program information in the community resource guide.</p> <p>Strategy 3.1.2 – Annually provide information and training to Public Health staff on community resource guide contents and usage.</p> <p>Strategy 3.1.3 – By June 2018, develop and implement a client satisfaction survey for clinic services.</p>
Goal #4: Provide a warm, friendly, inviting, and safe place that supports the efficient delivery of public health services to clients	
Objective 4.1 – Create a warm and inviting décor that reflects our public health values.	<p>Strategy 4.1.1 – By December 2017, improve the décor of the Public Health department to reflect our Mission, Vision and Values.</p> <p>Strategy 4.1.2 – By December 2017, install wall art and signage to create a welcoming and warm environment for clients.</p>

Strategic Priority Area #3: Collaborate to Improve Community Health and Well-being	
Goal #1: Effectively communicate with stakeholders and residents to promote the face of Public Health and ensure public confidence in, recognition of, and value for public health services.	
Objectives	Strategies
Objective 1.1 – Identify and implement strategies to increase public awareness of public health services and priority community	Strategy 1.1.1 – By June 2021, increase the use of social media across Public Health Nursing and Health Education programs.

health initiatives.	Strategy 1.1.2 – By December 2017, revise and improve the department website.
	Strategy 1.1.3 – By June 2017, rebrand the Public Health Facebook page
	Strategy 1.1.4 – By June 2017, increase the number of links to community organizations and resources on the Public Health Facebook page.
Objective 2.1 – Expand the 20000 Lives initiative to broaden the implementation of the Community Health Improvement Plan and evaluate the effectiveness of collaborative efforts to improve the health status of local residents.	Strategy 2.1.1 – By June 2018, increase the participation of non-traditional partnerships in the 20000 Lives Coalition.
	Strategy 2.1.2 – Annually, provide education and training opportunities to coalition members, including rural health issues and professional development to strengthen community workforce.
Goal #2: Foster diverse partnerships that strengthen our operations and capacity to improve our community's health.	
Objective 2.2 - Coordinate and improve data collection efforts to enable the collection of reliable, local, specific health data.	Strategy 2.2.1 – By December 2016, develop and implement tools to collect reliable, local data.
	Strategy 2.2.2 – By December 2016, collaborate with community partners to identify and share available local data.
Objective 2.3 - Regularly assess community health to determine trends, gaps, and needs.	Strategy 2.3.1 – Conduct a Community Health Assessment (CHA) every 3-5 years.
	Strategy 2.3.2 – Annually revisit CHA indicators to determine changes in community health status.
Objective 2.4 - Work collaboratively with community partners to implement projects and initiatives identified in the Community Health Improvement Plan.	Strategy 2.4.1 – Develop a Community Health Improvement Plan (CHIP) every 3-5 years.
	Strategy 2.4.2 – By June 2021, implement the CHIP in collaboration with community partners.
	Strategy 2.4.3 – Annually review and update the CHIP to document progress.

Appendices

Appendix A: Division SWOT Analysis

SWOT Analysis Summaries

Clinic and Nursing Division

STRENGTHS:

- Group support; everyone has each other's backs
- Good knowledge base and mix of years of experience
- Strong family planning services
- Good client base
- Even those with access to services elsewhere still want to come to Public Health because they trust our clinic
- Good relationship with FRC
- Very loyal clients, especially to Edie
- Non-judgmental, open-minded, respectful services
- We see and treat each other as fellow human beings – are there to support each other
- EMR – will save time and money in the future
- Ease of access – it's fairly easy to get in for an appointment for family planning or IZ
- We often fill the "appointment gap" when there is a long wait at local outpatient providers
- Very flexible in willingness to see clients
- We get LOTS of referrals and requests for services – must have a good reputation
- Leadership
- Reputation for providing high quality services in all areas – flu clinics, family planning, outreach, etc.
- The community knows public health and our services
- Those from larger communities have less access to services and knowledge of PH programs and services
- High level of coordination and collaboration
- FRC students love it here – people "look" at you and see you as a fellow human being
- Culture of intimacy, community support, and humanity
- Clinic staff are all cross-trained

WEAKNESSES

- Confidentiality is difficult in such a small community
- Being short-staffed has taken its toll and affects morale
- Need more stable and responsive inventory control – i.e. shouldn't "run out" of essentials like rings, etc.
- Better resource allocation for medical supplies
- Have continued "status quo" programs and services and taken on new things without adding more staff
- Over-extended and overwhelmed due to being short-staffed and continuing status quo service expectation
- Lack of training for programmatic expectations such as Parents as Teachers, Childbirth Education classes, etc.
- EMR is a huge undertaking, taking staff time away from programs without an additional staff person to help build reports, etc. during the transition.
- Squeezing people in for emergency birth control
- EMR double-charting is labor intensive
- Culture of "if we don't do it, nobody will" so we feel pressured to take on things that overwhelm
- EMR experience can be impersonal – need practice and training to personalize
- Families First – hard to have a routine, constantly putting out fires. FF has an expectation of minimum monthly visits, 3 X's per family per quarter. Even with triage, higher functioning families get pushed to the end of the list, but we still have to "make our numbers"
- Families First is also overwhelmed by CPS referrals, health education requests in CPS team meetings, and requests from Court orders, Social Worker, etc. FF nurses are called anytime there is reunification, team meeting, other. CPS referrals have increased FF caseload and there are high expectations that are difficult to reach within the program SOW.

OPPORTUNITIES

- PDH staff has said they have teens wanting confidential services. Opportunity to do outreach to this target population
- Better address teen pregnancy, which seems to be on the rise
- Seneca has Family Pact
- Every Woman Counts – if we can become a provider, women not reproductive can get reproductive health screening and care

- Outreach – have been so busy with Families First referrals and being understaffed, have not done outreach
- Discuss challenges, goals, outcomes of Families First with First 5
- Explore Medication Assisted Therapy and budget neutral funding
- Increase coordination for MAT and other opportunities with other county departments
- Increase coordination within the public health department i.e. comprehensive sex education
- Increasing access to care for FRC students with urgent/emergent health needs and coordinating with system of care to get them timely, affordable coverage
- Presumptive Eligibility cross-coordination with hospitals

THREATS

- Changes/losses in funding, coupled with increased personnel costs as staff advance
 - CHDP/CCS/AOD/MHSA/1st Five
- Limited hiring pool for nursing
- Shift in client population due to ACA
 - Less IZ
- Change in medical marijuana laws and impact on PH
- Liability issues with employee health

Fiscal and Administrative Division

STRENGTHS:

- Good customer service ethic
- Teamwork, supportive team
- Good Communication
- Skilled/adaptable workforce
- Good leadership
- Positive morale, positive attitude
- Good financial situation
- Reliable staff
- Good working relationships with all staff
- Helpful attitude – filing needs as they arise

WEAKNESSES:

- Lack of understanding between divisions
- Lack of a good process for tracking Family Planning revenues
- Lack of sufficient workforce to ideally cover and do a good/thorough job

- Not enough time to complete work
- Need for better cross training – need more time
- Administrative Division not growing in proportion to other divisions
- Need for fiscal staff meetings – better communication & coordination
- Need a front door button for Diane and need to better configure the clinic reception area to make it more efficient for staff and more confidential for clients
- Poor staging in office areas with public access – need things for the walls & the TVs need programming
- Veterans client scheduling – unhappy clients

OPPORTUNITIES:

- Possible new funding opportunities – Opiate – additional staffing?
- EHR – better billing opportunities
- Changes in other county department’s leadership & consequent transition of administrative staff – is an opportunity to share knowledge and communicate better on a county-wide level
- Good county-wide collaboration between departments
- Upgrade to County Auditor accounting software – may make it easier to track and report

THREATS:

- Changing healthcare system – provider confusion – lack of communication with Social Services
- Funding does not keep up with the demand for services

Health Education Division

STRENGTHS:

- Positive morale; solid workforce/good team; successful teamwork; diversity of backgrounds; staff commitment & passion; overlap & redundancy of staff/good backup; staff have good work/life balance and are engaged in the community
- Engaging Workplace; FUN; accommodating workplace (sit/stand, schedule flexibility)
- Strong Partnerships – both internally and externally
- Good reputation in the community; seen as community resource – conveners & facilitators
- Active/engaged Health Officer
- Good leadership
- Good internal support from administrative staff
- Excellent financial conditions

WEAKNESSES:

- Communication: between programs and divisions; don't communicate our successes to the public well; outdated website
- Lack of Integration – programs & divisions
- Lack of clearly defined strategic goals that we can align with all work plans
- Siloed work/program requirements prevent participation in broader activities – Activity Overload
- Focus on outputs rather than outcomes
- Rising employee costs vs. stagnant program budgets – always have to do more with less
- Program isolation – need for reorganization
- Physical divisions exacerbate department divisions – clinic (downstairs) and HE/Admin (upstairs)
- Budget & reimbursement drive separations
- Staff spread thin – staff burnout
- Dilution of work – too willing to take on new activities that don't necessarily align with Public Health
- Sedentary work

OPPORTUNITIES:

- Strong state & regional partnerships; regional leadership
- Good reputation
- Requests for services from community partners
- Promoting evidence-based practices in the community
- New funding opportunities: Opiate Overdose, Traffic Safety, Sex Ed.
- Training coordination to strengthen regional partnerships – ex. EPO, Opiate, HIV coordination with other counties to bring trainings to rural areas
- Ability to tie our work to economic outcomes – to bring community leaders on-board
- Accreditation

THREATS:

- Outside perception that PCPHA has a Quincy-centric approach
- Lack of clear and constant communication to share what we do – in each community
- Political change – local, state & national
- Potential funding reductions – based on performance management
- Lack of continuity and strength in Plumas County Health Services (MH, A&D, Probation) and across the county (schools) inhibit our ability to address the social determinants of health
- Conservative nature of our community; stigma for client populations; abstinence vs. harm reduction; lack of support for social safety-net programs
- Lack of education about the Public Health approach – non-judgmental/measurable change

- Increase in natural disasters related to climate change (flooding, fires)
- A changing Public Health environment with little funding flexibility
- Funding cuts
- Staff & leadership changes with partners – hospitals, schools, etc.
- Partners experiencing loss of funding – school services coordinators at risk of cuts.

Appendix B: Values, Vision, Mission Workshop (May 9, 2016)

Plumas County Public Health Agency Strategic Planning Workshop 5/9/16 Notes

Welcome and Overview

Introductory Protolanguage Activity

Mission: The organization's core purpose; what the organization does and why.

Vision: Futuristic view regarding the ideal state or conditions that the organization aspires to change or create.

Values: Principles, beliefs and underlying assumptions that guide the organization.

Values

Interview & Sticky wall activity: What are the principles, beliefs, and underlying assumptions that guide our organization? (see attached spreadsheet).

Break exercise – values slide show: Old fashioned wagon wheel; Stable horse leg with flair; Weed or wildflower; two staff walking in the distance – walking and environment

Vision

Visioning script and questions all around:

Sheet 1 – In the past 10 years, what is the most significant breakthrough that launched the organization into a whole new level of wild success? How? What happened? Who helped make it happen? What was different?

- More funding
- Fully staffed with equitable pay
- Plumas County ranked highest for quality of life because of income, equity, health outcomes, and social connections
- Staff gets training to bring it to the next level
- Regional coordinated effort reduced/eliminated overdose deaths
- An active community environment due to collaboration with Public Works and agricultural tourism

- Data driven interventions – performance management
- Better clinical efficiency through use of EHR

Sheet 2 – What are you most proud of? What are your top 1-3 major accomplishments or big wins? What difference did these accomplishments make in the community?

- The health department creates and unleashes leader!
- Complete knowledge of AOD prevention/treatment
- Retirement
- Established electronic medical records
- Reduction in tobacco use
- Availability
- Free meals – whole foods – for every child/youth
- Building relationships
- Sustainable living
- We have started collecting and disseminating more local data
- Showing our value at the table in multiple areas
- Sustainable AOD/youth prevention program – less lives lost to alcohol and drugs
- Everyone has equal opportunities
- Reduction in preventable health problems
- Partnerships
- Knowledge of health needs
- Voice for aging in our community
- Plumas top county in healthy/happy living

Sheet 3 – How are people working together internally? What is the feeling/tone of that work: how are teams working with one another across silos? What's new and different? Why is it working so well? What are the specific structures and practices that are making this new level of collaboration so successful?

- Collaborative creative solutions – efficiency
- Culture of quality
- All employees on the same floor
- Understanding by partners of PH's role within the system
- Use of groupware (Google docs or MS office 360)
- Willingness and openness
- Utilizing strengths of individual employees
- Team building exercises
- Potent and meaningful campaigns and messages

- Understanding of each individual's role/job/mission within PH
- Comfortable environment to voice ideas – work hard together
- Make personal contact
- More collaboration across programs
- We are the mode of innovative collective work with measurable results. Everyone wants to work here to change the community.
- Respectful – innovative - change government work structure will help in employee health and innovation

Sheet 4 – What lives is your work touching? Who are you serving? How are they engaging with you? Zero in on one or two representative individuals... Why are they choosing to engage with your messages, services, programs? What's in it for them?

- Individual feels heard in the community
- Touching lives of people who won't even know it
- Whoever walks in the front door
- Seniors, preschoolers, elementary, mid/high school/college
- People just like me
- Youth in all communities
- Underserved – Medi-Cal/underinsured population
- There are no barriers to care here!
- Change in environment affects all

Sheet 5 – Notice other groups that you partner with now... How is the health department specifically unique and different?

- A hub
- Focus on workforce development
- Understanding of need
- We're the host
- Stable leadership
- High functioning facilitators
- Part of bigger group
- Willingness to partner wherever we are needed
- We are the leader – convener-chief strategist.
- Community members approach us and say "How can I help?"
- Robots
- Build up our allies
- Variety of programs

- We have the desire to make it happen!

Sheet 6 – Are there new or unusual allies that contributed to your success as a health department?

- Law enforcement
- Food banks
- Public Works – environment
- More buy-in/support from Board of Supervisors
- Mental Health
- Seniors
- Individuals
- Retirees
- Youth
- Business community
- Schools/Office of Ed
- Medi-Cal clinics
- Retail owners
- Farmers
- Family Involvement
- HIV+ individuals
- A motivated leader
- PCIRC – resource centers
- Housing Authority
- People in recovery
- Representative, outside normal PH, diverse, collaborating

Distribution of Dots: Top responses on flip charts

- 1) PC ranks highest Quality of Life because of income, equity, health outcomes and social connections
- 2) More collaboration across programs
- 3) Top county in healthy, happy living
- 4) Touching lives of people who don't even know it
- 5) We have the desire to make it happen
- 6) Community members approach us and say "how can we help?"
- 7) Reduction in preventable health problems

Draft vision statements incorporating the top responses:

- **Utilizing community engagement** and collaboration to realize Plumas County's **highest health and well-being potential**.
- Plumas County Public Health strives to provide the highest QOL through **innovation**, organizational collaboration, community involvement, and providing opportunities for **social connections**.
- Plumas County is home to the **healthiest and happiest** people in the nation, because of the department's **commitment to innovative partnerships to improve every life**.
- PCPHA has successful health outcomes, **sustainable living**, and social connections that improve the Quality of Life through collaboration with and **participation of the community**.
- Plumas County Public Health Agency is a regional leader, **engaging a diverse group of community partners** who work together to create a healthy, happy, and **equitable environment** for everyone.

Mission

Draft mission statements (W: Who we are, N: Needs we exist to fill, R: Our Role, H: How we respond to needs)

- To promote health equity that improves Quality of Life for the entire community by maximizing innovative partnerships and collaborations. Safeguarding the community's rights to having an equitable environment to live in. (N,H,R)
- To better the community through innovative resources for a sustainable living. To meet the needs of Plumas County's highest health and wellbeing potential. (W, N, H)
- We endeavor to promote individual and community health and happiness through our devotion towards providing collaborative relationships with community partners and safeguarding our overall quality of life. (N, R, H)
- Empowering individuals to reach their healthiest potential through equitable services and meaningful connections. (N, H)
- PCPHA promotes the highest quality of life through innovative support of policy, system, and environmental changes that enhance our community. (W, N, R, H)
- PCPHA provides direct and indirect health care through collaboration within our community, connecting individuals with the appropriate services and education. (W, N, R, H)
- To promote and protect the health and safety of our community through innovative engagement of local residents and partners to encourage change to policies,

systems, and environments that prevent illness, promote social connections, and create a healthy, happy community. (N, R, H)

- To inform the community on healthy living and to enhance the highest health and wellbeing potential. (N, R, H)
- To ensure that all community members have access to health care and health education to enhance their quality of life. (N, R)
- To lead the community to health and happiness through community engagement, dedication and innovation. (N, R)
- To promote health, health equity, and healthy lifestyles by empowering individuals through prevention interventions and education. (R, N, H)
- Create conditions to achieve the highest QOL through innovation, safeguarding the environment and empowering our community through partnerships and social connections. (H, N, R)
- To ensure the best life possible for every resident through engaging the community in meaningful partnerships that impact health. (H, N, R)

Notes from Values Exercise

What are the principles, beliefs, and underlying assumptions that guide our organization?										
Honesty and Integrity	Community, Strengths, Connections	Compassion	Dependable, reliable, accountable, professional	Positive	Collective Impact	We care	Decisions empowered by knowledge	Innovation	Inclusive Service-Oriented	Communication
Honesty	Strengthening our community	Compassion	Consistency	Positive workplace	We have collective impact	Supportive	Education and interaction	Never static	Be humble and inviting	Communicate transparently
Integrity	We help frame our community	Keep your compassion	Dependable & reliable	smile	Collaboration	Sustainable	The knowledge to give the best care to the public	Positive change	We are welcoming	Communication
	We believe in our community	Kindness	On time with appointments	laughter is the best medicine	Working toward similar goals	Respectful	Give the tools to succeed (Life/Work)	Joyfulness in making a change	No wrong door approach	Listen
	Hope	Show Kindness	Reliable		Sustainable programming		Can provide accurate information	Look for solutions	We are open-minded and non-judgmental with our clients	Value listening
	Family		Professionalism - supporting clients		Stronger together		Informed	Willingness - going above and beyond	Help as many as you can	Confidential

	Environment of mutual respect		Be professional		Team work		Promotion/ Outreach	Above and beyond	Every person matters	
	Be courteous				Efficient			Being flexible with your time	Equity	
	Relationships with co-workers and clients				Individuals have unique strengths			Passion should be what motivated staff	Don't react to bad behavior	
									Understanding /accepting of co-workers and clients	

PCPHA VALUES-DRAFT

These values reflect the guiding principles that inform how we work toward our collective vision with each other, our community partners, and the residents we serve.

Honesty and Integrity

We commit to honesty and integrity in our interactions with others, and maintain transparency in our organization.

Relationships

We believe that our respectful connections to individuals, families, and the community as a whole are the foundation of community health and strength.

We Care

We act from compassion, kindness and respect and recognize how important it is to support and sustain each other.

Accountability

We hold ourselves accountable to being dependable, reliable and professional.

Positivity

We foster positivity and value humor in our workplace and the community.

Collective Impact

We recognize that we are stronger together and seek to draw on the unique strengths of our co-workers and community partners.

Empowerment through Information

We provide quality information and education to empower our whole community.

Innovation

We welcome and are passionate about change; are willing to go above and beyond; and are open to new ways of approaching solutions.

Humility and Inclusivity

We remain open-minded and non-judgmental; seeking to understand, accept, and assist each other regardless of any door a person walks through.

Communication

We remember to actively listen, communicate transparently, and honor confidentiality.

PCPHA VISION AND MISSION STATEMENTS

Vision

Plumas County is home to the healthiest and happiest people in the nation, who have strong social connections and work together for a better community.

Mission

The mission of the Plumas County Public Health Agency is to promote and protect individual and community health and well-being. We do this through innovative partnerships, public planning and policy, and ensuring access to respectful services.

Appendix C: Strategic Directions Workshop (May 23, 2016)

Driving and Resisting Forces

Plumas County Public Health Agency Strategic Planning Session May 23, 2016							
<i>Plumas County is home to the healthiest people in the nation, who have strong social connections and work together for a better community</i>							
DRIVING FORCES				RESISTING FORCES			
			Stability Creates Ability	Funding (lack of or loss of)			
			Empowering Leadership	Rural Community Issues			
			Diverse Supportive Partners	Chronic Vacancies	Personnel Uncertainty		
		Drive			Need for Stronger Communication/ Collaboration		
		Investing in the Workforce			Lack of Strong Internal Processes		
		Community Culture of Healthy Living			Lack of Employee Training		
		Pride in Service			Community Perception - Lack of Understanding		
	State/Federal Policy Environment				Staff Over- extended		
	Harmonious Alliances					Policy and Law Changes	
Positive Community Perception						Public Health Threats and Response	
Technology to Communicate our Work							

Identification of Broad Strategic Actions

What innovative, substantial actions will deal with the underlying contradictions and move us toward our vision?

Active Recruitment (B)	Creating a Premier Workplace (B)	Ensure Highly Competent Workforce (NT)	Strengthening Internal Efficiencies (K)	Formalize Mission Driven Financial Plan (S)	Engage & Empower Community Across the Spectrum of Prevention (K)	Promoting the face of Public Health (NT)	Broader Infrastructure Planning (B,S)
Proactive Recruiting (incentivize)	Analyzing Pay Scale	Enhancing a Stable Workforce through a Workforce Development Plan	Developing and Implementing P&P	Initiating Mission-Driven Funding Pursuits	Empowering Community	Promoting the Face of Public Health	Supporting Coalitions with Shared Goals to Fill Gaps/Needs
Expanding Employment Advertisment	Reformatting Workplace Compensations Even Beyond Salary & Benefits	Developing Orientation & Training Guidelines	Update our Technological Capabilities		Support Policy Development that Empowers People to Make Healthy Choices	Expanding Community Awareness of Public Health Issues and Services	Yearly Updated Resource Guide

	Launching Staff Wellness Policy/Program	Develop a 3 year Training Plan that Supports Employee Professional Development	Developing Action Plans to Work Toward Measurable Goals		Touch People Where They Are		Empowering Internal and External Partners to Better Advocate for Rural Issues
	Develop Employee Feedback/Survey Mechanisms	Dedicated Time/Money for Staff Development	Develop Continuity Planning				Engaging Non- Traditional Partnerships
			Enhancing Team Cohesion				

Appendix D: List of individuals who participated in the strategic planning process

STRATEGIC PLANNING WORKSHOPS ATTENDANCE ROSTER & TITLES

First	Last	TITLE
Andrew	Woodruff	Health Education Division Program Chief
Ashley	Underwood	Administrative Assistant I
Audrey	Rice	Fiscal & Technical Services Assistant II
Christi	Meyer	Public Health Nurse
Dana	Cash	Health Education Coordinator I
Danielle	Blust	Community Outreach Coordinator
Dawn	Fowler	Licensed Vocational Nurse I
Debbie	Robinson	Department Fiscal Officer II
Deniece	Heard	Department Fiscal Officer I
Diane	Goni	Administrative Assistant II
Edie	O'Connor	Physicians Assistant
James	Wilson	Health Education Specialist
Jana	McDowell	Licensed Vocational Nurse II
Jessica	Coelho	Health Education Specialist
Jimmy	LaPlante	Veterans Services Officer
John	Rix	Senior Services Director
Karla	Burnworth	Assistant Director
Katherine	Stafford	Public Health Nurse
Kristin	Brown	Registered Nurse I
Kyle	Short	Veterans Services Representative
Linda	DeWolf	Registered Nurse II
Lori	Pini	Health Education Coordinator I
Lori	Simpson	Plumas County Board of Supervisors
Meagan	Miller	Health Education Specialist
Megan	Mansfield	Health Education Specialist
Mimi	Hall	Director
Richard	Dolezal	Veterans Services Representative
Rosie	Olney	Management Analyst I
Tina	Venable	Director of Nursing
Zach	Revene	Health Education Coordinator II

Plumas County Public Health Agency Organizational Overview

January 17, 2017 Plumas County Board of Supervisors

Mimi Hall, Public Health Director



2E5

Plumas County Public Health Agency

1. Vision, Mission, Values
2. Mandates and Funding
3. Programs and Services
4. Funding and Staffing Trends
5. Key Issues

Vision and Mission

Vision

Plumas County is home to the healthiest and happiest people in the nation, who have strong social connections and work together for a better community.

Mission

The mission of the Plumas County Public Health Agency is to promote and protect individual and community health and well-being. We do this through innovative partnerships, public planning and policy, and ensuring access to respectful services.

Values

Values	Value Statements
Honesty and Integrity	We commit to honesty and integrity in our interactions with others, and maintain transparency in our organization.
Relationships	We believe that our respectful connections to individuals, families, and the community as a whole are the foundation of community health and strength.
We Care	We act from compassion, kindness and respect and recognize how important it is to support and sustain each other.
Accountability	We hold ourselves accountable to being dependable, reliable and professional.
Positivity	We foster positivity and value humor in our workplace and the community.
Collective Impact	We recognize that we are stronger together and seek to draw on the unique strengths of our co-workers and community partners.
Empowerment through Information	We provide quality information and education to empower our whole community.
Innovation	We welcome and are passionate about change; are willing to go above and beyond; and are open to new ways of approaching solutions.
Humility and Inclusivity	We remain open-minded and non-judgmental; seeking to understand, accept, and assist each other regardless of any door a person walks through.
Communication	We remember to actively listen, communicate transparently, and honor confidentiality.

Preventing, Promoting, Protecting the Health of the Public

- The Agency oversees and administers a number of federal and state programs
- We leverage these grants with Realignment and other resources to achieve our goals
- Other funds include special programs, grants, donations, and charges for services to meet local priorities.

Statutory Health and Indigent Care Mandates

- Health and Safety Code Section 101025, county responsibility to “...take measures as may be necessary to preserve and protect the public health...of the county...”
- Welfare and Institutions Code Section 17000 requires county governments to provide relief to the poor, including “those incapacitated by age, disease, or accident” (indigent health care).
- California Code of Regulations Title 17, Chapter 3: each local health department “shall offer at least the following basic services to the health jurisdiction it serves”

CCR Title 17 Basic Health Services

- Data Collection and Analysis
- Health Education Programs
- Communicable Disease Control
- Environmental Health
- Laboratory Services
- Services Promoting Maternal and Child Health
- Nutrition Education Services
- Chronic Disease Prevention Services
- Public Health Nursing Services

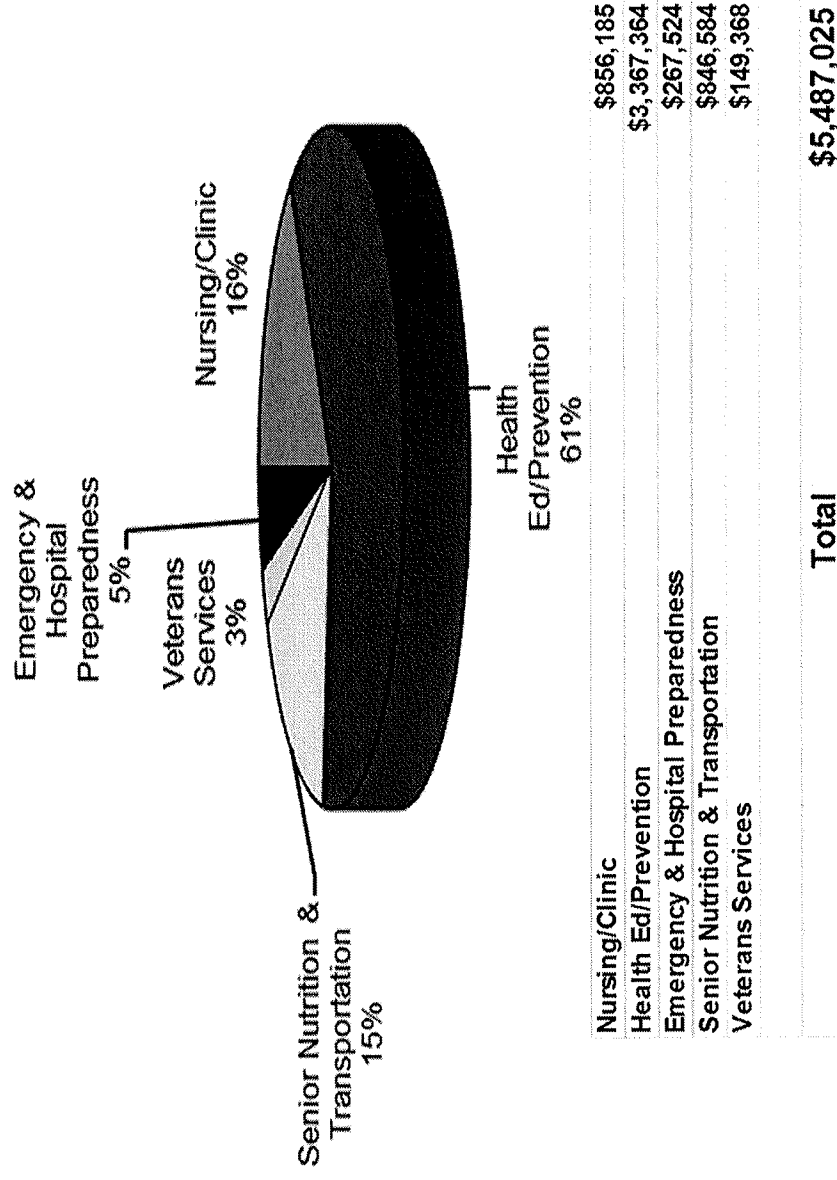
10 Essential Public Health Services

1. **Monitor** health status to identify and solve community health problems.
2. **Diagnose and investigate** health problems and health hazards in the community.
3. **Inform, educate**, and empower people about health issues.
4. **Mobilize** community partnerships and action to identify and solve health problems.
5. **Develop policies and plans** that support individual and community health efforts.
6. **Enforce** laws and regulations that protect health and ensure safety. Example: restaurant inspections.
7. **Link** people to needed personal health services and assure the provision of health care when otherwise unavailable.
8. **Assure** competent public and personal health care workforce.
9. **Evaluate** effectiveness, accessibility, and quality of personal and population-based health services.
10. **Research** for new insights and innovative solutions.

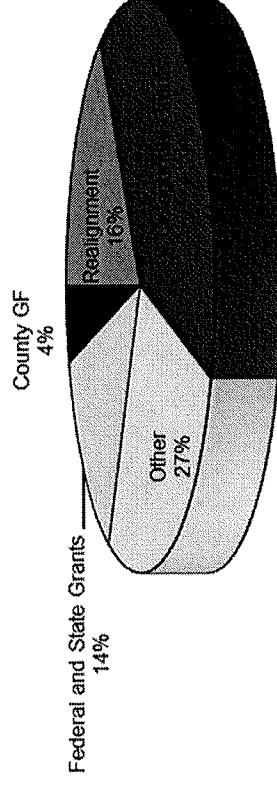
Organizational Divisions

- Fiscal and Administrative
- Clinic and Health Services
- Health Education and Prevention
- Senior Services
- Veterans Services

2016-2017 Funding by Programs



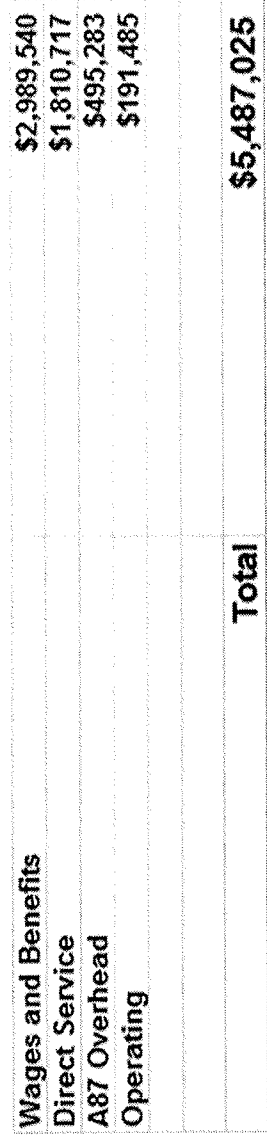
2016-2017 Funding by Source



Realignment	\$882,000
Categorical Grants	\$2,149,958
Other	\$1,473,167
Federal and State Grants	\$742,316
County GF	\$239,584
Total	\$5,487,025

The pie chart illustrates the distribution of costs across four categories. The largest portion is Wages and Benefits at 54%, followed by A87 Overhead at 9%, Operating at 4%, and an unlabeled category at 0%.

Category	Percentage
Wages and Benefits	54%
A87 Overhead	9%
Operating	4%
Unlabeled	0%



Categorical Funding

- Maternal Child Adolescent Health
- Child Health and Disability Prevention Program
- Nutrition Education
- Immunizations
- California Children's Services

Other Funding

- Medi-Cal Administrative Activities
- Alcohol and Other Drug Prevention – SAPT Block Grant
- Mental Health Services Act
- First 5
- General Fund
- Fee for Service
- Various grants

State and Federal Funding

- HIV / AIDS
- Childhood Lead Prevention
- CalVet Subvention
- Area Agency on Aging
- Proposition 99 Tobacco tax

Realignment Funding

1991/AB85

- Stable, relatively predictable (until recently) funding source to allow counties to plan across fiscal years
- Intent was to allow counties flexibility to target resources to address priority health needs
- Realignment funds can be used to supplement categorical grant funding that hasn't kept up with need
- Each county has a Maintenance of Effort match

Realignment Challenges and Opportunities

- Sales Tax and Vehicle License fees are volatile
- In economic downturns when Realignment decreases, the demand for local health services in counties' most vulnerable residents increases
- \$882K in FY 16-17 Realignment
 - \$495K is transferred to GF for overhead,
 - \$200K is transferred to the Environmental Health Department
 - \$187K, about 20%, is available to support core public health needs
- \$66,295 GF MOE is reinvested towards activities that address Community Health Improvement Plan Priorities Areas

2016-2017 Organizational Priorities

- National Public Health Accreditation
- Strategic Plan Implementation
 - Performance Management System
- Multi-year plan with targeted reserves
- Protect sufficient Health Realignment funding for residual indigent health and core public health responsibilities.

Questions?



OFFICE OF THE
COUNTY COUNSEL
COUNTY OF PLUMAS

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January 11, 2017

MEMORANDUM

TO: Honorable Board of Supervisors, County of Plumas

FROM: R. Craig Settlemyre, *Plumas County Counsel*

A handwritten signature in cursive script, reading "R. Craig Settlemyre".

SUBJECT: Review and Update of "Guidelines for Tax Exchange Negotiations for Annexations" (for the meeting on January 17, 2017)

Summary of Recommendation and Alternative Action(s):


Primary Recommendation: That the current "Guidelines for Tax Exchange Negotiations for Annexations" (see Attachment "A" for a full copy) be rescinded in their entirety, and that any request for an exchange of property tax revenues be brought directly to the Board of Supervisors for direct negotiations with the district (or city) in an open session.

Alternative Actions:

A. No change. (Continue with existing Guidelines, but require compliance before considering any transfer of County property tax revenue. Failure to comply with the Guidelines requirements will result in the conclusion of negotiations as "unsuccessful.")

B. Rescind the existing Guidelines in favor of direct negotiation in front of the Board *before a petition is filed with LAFCo* for the annexation. (This is similar to the Primary Recommendation, above, but requires a district seeking a share of the County's property tax revenue to initiate discussions before the LAFCo process is started. Failure to initiate such early negotiations will result in conclusion of later negotiations as "unsuccessful.")

C. Revise the Guidelines to establish a new standard consistent with the result in the La Porte annexation. (County will contribute by transferring a share of County allocation that exceeds the County allocation in the pre-Proposition 13 area of the district; the district to raise any additional revenue by way of special parcel tax, charges for buy-in to existing facilities, and pay a proportionate share of the cost to serve the newly annexed area (development fee). This would provide predictability for districts and property owners considering annexations.)

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Applicable Law and Current Plumas County Policy:

State Law – Generally: Prior to the passage of Proposition 13 by the voters in 1978, counties, cities, and special districts having the power to levy a property tax based on the value of land and improvements (an "*ad valorem*" tax) would typically establish a budget for the coming fiscal year, then levy a property tax to provide the necessary revenue to fund the budget appropriations. Each levy was added to the other levies to come up with a total tax rate that was collected on the property tax bill sent out by the county treasurer. Proposition 13 ended this practice by limiting the maximum *ad valorem* property tax rate (not including bond levies) to one percent (1%) of assessed value. Where the total pre-Proposition 13 tax rate exceeded one percent (1%), each taxing entity had its property tax rate proportionately reduced so the total rate did not exceed one percent (1%). Only governmental entities having a share of the property tax at the time of passage of Proposition 13 could continue to collect a property tax. Any newly created governmental entities, or governmental entities seeking to expand their territory, would have to obtain a share of property taxes from the other entities that had a share of the property taxes. This exchange (or transfer) of property tax revenue is accomplished by negotiation.

The exchange of *ad valorem* property tax revenue between the County and other entities having the power to levy a property tax generally comes up in two likely situations: 1) the annexation of new territory to a city or special district in order to provide the annexing territory with new governmental services; or 2) a post-annexation request by an entity having the power to levy a property tax to another entity having the power to levy a property tax that some part of the share of property tax revenue be transferred from one to the other.

New Annexations: Sections 99 and 99.01 of the Revenue and Taxation Code (see Attachment "B") provide that in the event of an annexation ("jurisdictional change") that will result in a special district providing services to an area where those services have not been previously provided, the local agencies receiving property tax revenue are to enter into negotiations for the possible exchange of property tax revenue from the property tax increment with the agency providing the new services. The initial negotiating period is 60 days but may be extended to 90 days. While negotiations are mandatory, in the case of special districts, there is no requirement that the negotiations result in an agreement. If there is no agreement, LAFCo cannot complete the annexation.

Post-Annexation: After an annexation has been completed, participation in *post-annexation* property tax exchange negotiations, such as this proposal, is voluntary and subject to statutory restrictions. Subdivision (k) of Revenue and Taxation Code section 99 provides:

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(k) At any time after a jurisdictional change is effective, any of the local agencies party to the agreement to exchange property tax revenue *may renegotiate the agreement* with respect to the current fiscal year or subsequent fiscal years, subject to approval by all local agencies affected by the renegotiation.

[Italics added for emphasis.]

The use of the word "*may*" indicates that renegotiation are *permissive*, not mandatory. Revenue and Taxation Code section 99.02(b) also uses the permissive "*may*" when it provides that, "[A]ny local agency *may*, by the adoption of a resolution of its governing body or governing board, determine to transfer any portion of its property tax revenues"

However, before an exchange can be made, Revenue and Taxation Code section 99.02 (see Attachment "C" for the full text) requires the following procedures and conditions:

- A. Both agencies are required to hold a **public hearing**, ". . . to consider the effect of the proposed transfer on fees, charges, assessments, taxes, or other revenues." Notice of the public hearing shall be published in the newspaper.
- B. The adoption of a **Resolution** determining the portion of property taxes transferred.
- C. No local agency shall transfer property tax revenue pursuant to this section unless **each of the following conditions exists**:
 - (1) The transferring agency determines that revenues are available for this purpose.
 - (2) The transfer will not result in any increase in the ratio between the amount of revenues of the transferring agency that are generated by regulatory licenses, use charges, user fees, or assessments and the amount of revenues of the transferring agency used to finance services provided by the transferring agency.
 - (3) The transfer will not impair the ability of the transferring agency to provide existing services.
 - (4) The transfer will not result in a reduction of property tax revenues to school entities.

Existing County Policy: In addition to the foregoing statutory requirements, on December 18, 2007, the Plumas County Board of Supervisors approved "Guidelines for Tax Exchange Negotiations for Annexations" (see Attachment "A"). The Guidelines require a district seeking to receive an exchange of a portion of the County share of the property tax increment provide specific information in support of the request, and that the district approve a special tax,

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assessment, or other funding mechanism prior to the County agreement to a tax exchange. In addition, any emergency response district is expected to implement a "cost reimbursement system."

Discussion:

Although the Board of Supervisors adopted the "Guidelines for Tax Exchange Negotiations for Annexations" on December 18, 2007, since my arrival in the County Counsel's Office over six years ago, no special district requesting an exchange of property tax revenue, nor the County itself, has ever followed the provisions of these "Guidelines." The districts have not provided the financial justification, plan for uses of revenue, a cost reimbursement system, or special tax, assessment, or other funding mechanism (except to point to an existing special tax, if any). Nor has the County Board of Supervisors insisted upon such requirements as a prerequisite to negotiations and an exchange of property tax revenues from the County to the District. A spreadsheet summarizing the results of recent property tax negotiations is attached as Attachment "D."

Primary Recommendation: That the Guidelines be rescinded in their entirety, and that any request for an exchange of property tax revenues be brought directly to the Board of Supervisors for direct negotiations with the district in an open session.

This approach will greatly speed up the negotiation process. In the past, the time it takes to request the Guideline information (and not receive it), to schedule an in-person meeting between County and District representatives, and then to agendaize the matter before the Board of Supervisors has exceeded the 90-day time period for such negotiations specified in the Revenue and Taxation Code. With this new approach, the matter may be brought to the Board as soon as the Auditor provides the allocation factors to all the taxing entities and right after the Clerk of the Board gives written notice to each of the taxing entities that the Board of Supervisors will negotiate on behalf of all the taxing entities (other than school entities) unless they opt to negotiate on their own behalf.

The current statutory system contemplates that the property tax negotiations will take place at the very end of the annexation process. From a practical standpoint, this is backwards. By law, LAFCo cannot complete the annexation if the parties do not agree to a property tax exchange. If the property tax exchange is critical to the annexation, this needs to be addressed at the very beginning of the process – before anyone expends the time to petition LAFCo and pay LAFCo filing fees.

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Additional Recommendation: The County should require negotiations over property tax exchange happen BEFORE a petition is filed with LAFCo.

At the beginning of negotiations, typically annexing districts will not do anything to help themselves financially, except to demand a share of the County's *ad valorem* property taxes – although it has been pointed out that revenue will be totally inadequate to provide services to the annexing territory. The Guideline requirements that the districts describe financial justification, plan for uses of revenue, a cost reimbursement system, or special tax, assessment, or other funding mechanism was intended to get the districts to think about such matters, often for the first time. Although I have used this as an opportunity (based on my past experience representing such districts) to recommend a charge for buy-in to existing capital facilities, a development fee for needed facilities to expand services to the new territory, special taxes to provide immediate cash flow to fund services, charges for service calls (reimbursable by insurance), and other financial considerations that can be implemented to improve District finances, the Districts often decline to entertain such options. Districts will, instead, as was the case with Chandler, opt to wait for changes in the tax increment that may only generate as little as \$75 per year in the entire subdivision. (The only district that made any attempt to follow some of these suggestions was La Porte Fire.)

Usually, the negotiating stance of the districts has been to ask for a share of property tax allocation equal to that paid by taxpayers in the majority of the existing district (in effect, that part of the district existing before Proposition 13.) No reason is given for this position except to say, "It is fair that the new area support the district like their neighbors do." But, because school entities are prohibited by law from sharing any part of their property taxes and the districts do not want to take taxes away from their fellow districts that are struggling, this leaves it to the County to give up its property taxes – sometimes as much as one-quarter or one-third of future increases in property taxes. (The districts do not consider that their request will result in the newly annexed areas supporting the County General Fund at a lower level than does the pre-Prop 13 part of the district.) No consideration is given to the impact on the County's property tax revenue because the revenue on one or two parcels seems so small. However, the County does need to consider the cumulative effect of this approach if the thousands of parcels outside a fire district are annexed. A calculation should be done for each parcel not in a fire district of the effect of transferring the increment using the tax share allocation of the nearest fire district. Then, run that number forward for 25 years assuming the historic increase in property tax valuations since Prop 13. The amount of lost revenue to the County of continuing the de facto practice of the last six years is likely to be substantial.

Since fire districts routinely respond to all fires, whether in their district or not, a property owner may ask the question, "Why annex at all?" It would seem that the only reason to annex would be

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if a property owner wants to divide his/her property into new parcels. State law now prohibits new parcel creation without providing for fire protection. But, as mentioned, existing parcels receive fire protection anyway without annexation.

Respectfully submitted.

END OF MEMORANDUM

[Y:\Memos\BOS Memo re Property Tax Negotiations -- Guidelines update.doc]

Guidelines for Tax Exchange Negotiations for Annexations
(Approved December 18, 2007)

1. It is not the policy of Plumas County to share any portion of the County tax base, and this policy applies only to the sharing of tax increment. Exchanges will be based on public policy reasons.
2. The district will be expected to provide financial justification for the request of tax exchange. This justification must include both how the sharing would benefit the district and how the exchange benefits the County.
3. The District must approve a special tax, assessment, or other funding mechanism prior to the County agreement to a tax exchange.
4. The District must present its plan for uses for the revenues generated by the exchange.
5. The County shall make the following two findings:
 - (a) The County shall determine that revenues are available for the transfer.
 - (b) The transfer will not impair the ability of the County to provide existing services.
6. Any emergency response district shall implement a cost reimbursement system.
7. Districts must notify the County of their desire to negotiate.
8. The County may choose not to negotiate with any district that is not part of the Special District Association. The Special District Association may provide negotiators.

§ 99. Allocation of property tax revenues when jurisdictional changes occur; Notice; Property tax transfer agreement; Community college annexation; Renegotiation

- (a) For the purposes of the computations required by this chapter:
- (1) In the case of a jurisdictional change, other than a city incorporation, city disincorporation, or a formation of a district as defined in Section 2215, the auditor shall adjust the allocation of property tax revenue determined pursuant to Section 96 or 96.1, or the annual tax increment determined pursuant to Section 96.5, for local agencies whose service area or service responsibility would be altered by the jurisdictional change, as determined pursuant to subdivision (b) or (c).
 - (2) In the case of a city incorporation or disincorporation, the auditor shall assign the allocation of property tax revenues determined pursuant to Section 56810 of the Government Code and the adjustments in tax revenues that may occur pursuant to Section 56815 of the Government Code to the newly formed city or district and shall make the adjustment as determined by Section 56810 or 56813 in the allocation of property tax revenue determined pursuant to Section 96 or 96.1 for each local agency whose service area or service responsibilities would be altered by the incorporation.
 - (3) In the case of a formation of a district as defined in Section 2215, the auditor shall assign the allocation of property tax revenues determined pursuant to Section 56810 of the Government Code to the district and shall make the adjustment as determined by Section 56810, or for the disincorporated city or dissolved district as determined by Section 56813, in the allocation of property tax revenue determined pursuant to Section 96 or 96.1 for each local agency whose service area or service responsibilities would be altered by the change of organization.
- (b) Upon the filing of an application or a resolution pursuant to the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (Division 3 (commencing with Section 56000) of Title 5 of the Government Code), but prior to the issuance of a certificate of filing, the executive officer shall give notice of the filing to the assessor and auditor of each county within which the territory subject to the jurisdictional change is located. This notice shall specify each local agency whose service area or responsibility will be altered by the jurisdictional change.
- (1)
 - (A) The county assessor shall provide to the county auditor, within 30 days of the notice of filing, a report which identifies the assessed valuations for the territory subject to the jurisdictional change and the tax rate area or areas in which the territory exists.
 - (B) The auditor shall estimate the amount of property tax revenue generated within the territory that is the subject of the jurisdictional change during the current fiscal year.
 - (2) The auditor shall estimate what proportion of the property tax revenue determined pursuant to paragraph (1) is attributable to each local agency pursuant to Sections 96.1 and 96.5.
 - (3) Within 45 days of notice of the filing of an application or resolution, the auditor shall notify the governing body of each local agency whose service area or service responsibility will be altered by the jurisdictional change of the amount of, and allocation factors with respect to, property tax revenue estimated pursuant to paragraph (2) that is subject to a negotiated exchange.
 - (4) Upon receipt of the estimates pursuant to paragraph (3), the local agencies shall commence negotiations to determine the amount of property tax revenues to be exchanged between and among the local agencies. Except as otherwise provided, this negotiation period shall not exceed 60 days. If a local agency involved in these negotiations notifies the other local agencies, the county auditor, and the local agency formation commission in writing of its desire to extend the negotiating period, the negotiating period shall be 90 days.

The exchange may be limited to an exchange of property tax revenues from the annual tax increment generated in the area subject to the jurisdictional change and attributable to the local agencies whose service area or service

responsibilities will be altered by the proposed jurisdictional change. The final exchange resolution shall specify how the annual tax increment shall be allocated in future years.

- (5) In the event that a jurisdictional change would affect the service area or service responsibility of one or more special districts, the board of supervisors of the county or counties in which the districts are located shall, on behalf of the district or districts, negotiate any exchange of property tax revenues. Prior to entering into negotiation on behalf of a district for the exchange of property tax revenue, the board shall consult with the affected district. The consultation shall include, at a minimum, notification to each member and executive officer of the district board of the pending consultation and provision of adequate opportunity to comment on the negotiation.
- (6) Notwithstanding any other provision of law, the executive officer shall not issue a certificate of filing pursuant to Section 56658 of the Government Code until the local agencies included in the property tax revenue exchange negotiation, within the negotiation period, present resolutions adopted by each such county and city whereby each county and city agrees to accept the exchange of property tax revenues.
- (7) In the event that the commission modifies the proposal or its resolution of determination, any local agency whose service area or service responsibility would be altered by the proposed jurisdictional change may request, and the executive officer shall grant, 30 days for the affected agencies, pursuant to paragraph (4), to renegotiate an exchange of property tax revenues. Notwithstanding the time period specified in paragraph (4), if the resolutions required pursuant to paragraph (6) are not presented to the executive officer within the 30-day period, all proceedings of the jurisdictional change shall automatically be terminated.
- (8) In the case of a jurisdictional change that consists of a city's qualified annexation of unincorporated territory, an exchange of property tax revenues between the city and the county shall be determined in accordance with subdivision (e) if that exchange of revenues is not otherwise determined pursuant to either of the following:
 - (A) Negotiations completed within the applicable period or periods as prescribed by this subdivision.
 - (B) A master property tax exchange agreement among those local agencies, as described in subdivision (d).

For purposes of this paragraph, a qualified annexation of unincorporated territory means an annexation, as so described, for which an application or a resolution was filed on or after January 1, 1998, and on or before January 1, 2021.
- (9) No later than the date on which the certificate of completion of the jurisdictional change is recorded with the county recorder, the executive officer shall notify the auditor or auditors of the exchange of property tax revenues and the auditor or auditors shall make the appropriate adjustments as provided in subdivision (a).
- (c) Whenever a jurisdictional change is not required to be reviewed and approved by a local agency formation commission, the local agencies whose service area or service responsibilities would be altered by the proposed change, shall give notice to the State Board of Equalization and the assessor and auditor of each county within which the territory subject to the jurisdictional change is located. This notice shall specify each local agency whose service area or responsibility will be altered by the jurisdictional change and request the auditor and assessor to make the determinations required pursuant to paragraphs (1) and (2) of subdivision (b). Upon notification by the auditor of the amount of, and allocation factors with respect to, property tax subject to exchange, the local agencies, pursuant to the provisions of paragraphs (4) and (6) of subdivision (b), shall determine the amount of property tax revenues to be exchanged between and among the local agencies. Notwithstanding any other provision of law, no such jurisdictional change shall become effective until each county and city included in these negotiations agrees, by resolution, to accept the negotiated exchange of property tax revenues. The exchange may be limited to an exchange of property tax revenue from the annual tax increment generated in the area subject to the jurisdictional change and attributable to the local agencies whose service area or service responsibilities will be altered by the proposed jurisdictional change. The final exchange resolution shall specify how the annual tax increment shall be allocated in future years. Upon the adoption of the resolutions required pursuant to this section, the adopting agencies shall notify the auditor who shall make the appropriate adjustments as provided in subdivision (a). Adjustments in property tax allocations made as the result of a city or library district withdrawing from a county free library system pursuant to Section 19116 of the Education Code shall be made pursuant to Section 19116 of the Education Code, and this subdivision shall not apply.

- (d) With respect to adjustments in the allocation of property taxes pursuant to this section, a county and any local agency or agencies within the county may develop and adopt a master property tax transfer agreement. The agreement may be revised from time to time by the parties subject to the agreement.
- (e)
- (1) An exchange of property tax revenues that is required by paragraph (8) of subdivision (b) to be determined pursuant to this subdivision shall be determined in accordance with all of the following:
 - (A) The city and the county shall mutually select a third-party consultant to perform a comprehensive, independent fiscal analysis, funded in equal portions by the city and the county, that specifies estimates of all tax revenues that will be derived from the annexed territory and the costs of city and county services with respect to the annexed territory. The analysis shall be completed within a period not to exceed 30 days, and shall be based upon the general plan or adopted plans and policies of the annexing city and the intended uses for the annexed territory. If, upon the completion of the analysis period, no exchange of property tax revenues is agreed upon by the city and the county, subparagraph (B) shall apply.
 - (B) The city and the county shall mutually select a mediator, funded in equal portions by those agencies, to perform mediation for a period not to exceed 30 days. If, upon the completion of the mediation period, no exchange of property tax revenues is agreed upon by the city and the county, subparagraph (C) shall apply.
 - (C) The city and the county shall mutually select an arbitrator, funded in equal portions by those agencies, to conduct an advisory arbitration with the city and the county for a period not to exceed 30 days. At the conclusion of this arbitration period, the city and the county shall each present to the arbitrator its last and best offer with respect to the exchange of property tax revenues. The arbitrator shall select one of the offers and recommend that offer to the governing bodies of the city and the county. If the governing body of the city or the county rejects the recommended offer, it shall do so during a public hearing, and shall, at the conclusion of that hearing, make written findings of fact as to why the recommended offer was not accepted.
 - (2) Proceedings under this subdivision shall be concluded no more than 150 days after the auditor provides the notification pursuant to paragraph (3) of subdivision (b), unless one of the periods specified in this subdivision is extended by the mutual agreement of the city and the county. Notwithstanding any other provision of law, except for those conditions that are necessary to implement an exchange of property tax revenues determined pursuant to this subdivision, the local agency formation commission shall not impose any fiscal conditions upon a city's qualified annexation of unincorporated territory that is subject to this subdivision.
 - (f) Except as otherwise provided in subdivision (g), for the purpose of determining the amount of property tax to be allocated in the 1979-80 fiscal year and each fiscal year thereafter for those local agencies that were affected by a jurisdictional change which was filed with the State Board of Equalization after January 1, 1978, but on or before January 1, 1979. The local agencies shall determine by resolution the amount of property tax revenues to be exchanged between and among the affected agencies and notify the auditor of the determination.
 - (g) For the purpose of determining the amount of property tax to be allocated in the 1979-80 fiscal year and each fiscal year thereafter, for a city incorporation that was filed pursuant to Sections 54900 to 54904, inclusive, of the Government Code after January 1, 1978, but on or before January 1, 1979, the amount of property tax revenue considered to have been received by the jurisdiction for the 1978-79 fiscal year shall be equal to two-thirds of the amount of property tax revenue projected in the final local agency formation commission staff report pertaining to the incorporation multiplied by the proportion that the total amount of property tax revenue received by all jurisdictions within the county for the 1978-79 fiscal year bears to the total amount of property tax revenue received by all jurisdictions within the county for the 1977-78 fiscal year. Except, however, in the event that the final commission report did not specify the amount of property tax revenue projected for that incorporation, the commission shall by October 10 determine pursuant to Section 54790.3 of the Government Code the amount of property tax to be transferred to the city.

The provisions of this subdivision shall also apply to the allocation of property taxes for the 1980-81 fiscal year and each fiscal year thereafter for incorporations approved by the voters in June 1979.

- (h) For the purpose of the computations made pursuant to this section, in the case of a district formation that was filed pursuant to Sections 54900 to 54904, inclusive, of the Government Code after January 1, 1978, but before January 1, 1979, the amount of property tax to be allocated to the district for the 1979-80 fiscal year and each fiscal year thereafter shall be determined pursuant to Section 54790.3 of the Government Code.
- (i) For the purposes of the computations required by this chapter, in the case of a jurisdictional change, other than a change requiring an adjustment by the auditor pursuant to subdivision (a), the auditor shall adjust the allocation of property tax revenue determined pursuant to Section 96 or 96.1 or its predecessor section, or the annual tax increment determined pursuant to Section 96.5 or its predecessor section, for each local school district, community college district, or county superintendent of schools whose service area or service responsibility would be altered by the jurisdictional change, as determined as follows:
 - (1) The governing body of each district, county superintendent of schools, or county whose service areas or service responsibilities would be altered by the change shall determine the amount of property tax revenues to be exchanged between and among the affected jurisdictions. This determination shall be adopted by each affected jurisdiction by resolution. For the purpose of negotiation, the county auditor shall furnish the parties and the county board of education with an estimate of the property tax revenue subject to negotiation.
 - (2) In the event that the affected jurisdictions are unable to agree, within 60 days after the effective date of the jurisdictional change, and if all the jurisdictions are wholly within one county, the county board of education shall, by resolution, determine the amount of property tax revenue to be exchanged. If the jurisdictions are in more than one county, the State Board of Education shall, by resolution, within 60 days after the effective date of the jurisdictional change, determine the amount of property tax to be exchanged.
 - (3) Upon adoption of any resolution pursuant to this subdivision, the adopting jurisdictions or State Board of Education shall notify the county auditor who shall make the appropriate adjustments as provided in subdivision (a).
- (j) For purposes of subdivision (i), the annexation by a community college district of territory within a county not previously served by a community college district is an alteration of service area. The community college district and the county shall negotiate the amount, if any, of property tax revenues to be exchanged. In these negotiations, there shall be taken into consideration the amount of revenue received from the timber yield tax and forest reserve receipts by the community college district in the area not previously served. In no event shall the property tax revenue to be exchanged exceed the amount of property tax revenue collected prior to the annexation for the purposes of paying tuition expenses of residents enrolled in the community college district, adjusted each year by the percentage change in population and the percentage change in the cost of living, or per capita personal income, whichever is lower, less the amount of revenue received by the community college district in the annexed area from the timber yield tax and forest reserve receipts.
- (k) At any time after a jurisdictional change is effective, any of the local agencies party to the agreement to exchange property tax revenue may renegotiate the agreement with respect to the current fiscal year or subsequent fiscal years, subject to approval by all local agencies affected by the renegotiation.

History

Added Stats 1994 ch 1167 § 3 (AB 3347). Amended Stats 1996 ch 522 § 5 (SB 1998), operative July 1, 1997; Stats 1997 ch 692 § 2 (SB 466); Stats 1999 ch 550 § 29 (SB 275), effective September 28, 1999, operative January 1, 2000; Stats 2000 ch 761 § 285 (AB 2838); Stats 2004 ch 355 § 11 (AB 3077); Stats 2005 ch 189 § 1 (AB 818), effective January 1, 2006; Stats 2009 ch 332 § 79.5 (SB 113), effective January 1, 2010; Stats 2010 ch 47 § 11 (AB 2795), effective January 1, 2011; Stats 2012 ch 62 § 21 (AB 2698), effective January 1, 2013; Stats 2015 ch 304 § 22 (AB 851), effective January 1, 2016.

- Amended Stats 2000 ch 761 § 285 (AB 2838); Stats 2004 ch 355 § 11 (AB 3077); Stats 2005 ch 189 § 1 (AB 818), effective January 1, 2006; Stats 2009 ch 332 § 79.5 (SB 113), effective January 1, 2010; Stats 2010 ch 47 § 11 (AB 2795), effective January 1, 2011; Stats 2012 ch 62 § 21 (AB 2698), effective January 1, 2013; Stats 2015 ch 304 § 22 (AB 851), effective January 1, 2016.

§ 99.01. Change resulting in new services

- (a) For the purposes of Section 99, in the case of a jurisdictional change that will result in a special district providing one or more services to an area where those services have not been previously provided by any local agency, the following shall apply:
- (1) The special district referred to in this subdivision and each local agency that receives an apportionment of property tax revenue from the area shall be considered local agencies whose service area or service responsibility will be altered by the jurisdictional change.
 - (2) The exchange of property tax among those local agencies shall be limited to property tax revenue from the annual tax increment generated in the area subject to the jurisdictional change and attributable to those local agencies.
 - (3) Notwithstanding the provisions of paragraph (5) of subdivision (b) of Section 99, any special district affected by the jurisdictional change may negotiate on its own behalf, if it so chooses.
 - (4) If a special district involved in the negotiation (other than the district which will provide one or more services to the area where those services have not been previously provided) fails to adopt a resolution providing for the exchange of property tax revenue, the board of supervisors of the county in the area subject to the jurisdictional change is located shall determine the exchange of property tax revenue for that special district.
- (b) The provisions of subdivisions (a), (b), (c), (d), and (j) of Section 99 not in conflict with this section shall apply. The jurisdictional changes described in subdivisions (e), (f), (g), (h), and (i) of Section 99 shall not be affected by the provisions of this section.

History

Added Stats 1994 ch 1167 § 3 (AB 3347).

Cal Rev & Tax Code § 99.01

DEERING'S CALIFORNIA CODES ANNOTATED

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End of Document

Transfer of Property Tax Revenue Not Related to Jurisdictional Change -- Statutes

Revenue & Taxation Code § 99.02. Transfer of property tax revenue; Adjustments; Public hearing

(a) For the purposes of the computations required by this chapter for the 1985-86 fiscal year and fiscal years thereafter, in the case of any transfer of property tax revenues between local agencies that is adopted and approved in conformity with subdivisions (b) and (c), the auditor shall adjust the allocation of property tax revenue determined pursuant to Section 96.1 or its predecessor section, or the annual tax increment determined pursuant to Section 96.5 or its predecessor section, for those local agencies whose allocation would be altered by the transfer.

(b) Commencing with the 1985-86 fiscal year, any local agency may, by the adoption of a resolution of its governing body or governing board, determine to transfer any portion of its property tax revenues that is allocable to one or more tax rate areas within the local agency to one or more other local agencies having the same tax rate area or tax rate areas. Upon the local agency's adoption of the resolution, the local agency shall notify the board of supervisors of the county or the city council of the city within which the transfer of property tax revenues is proposed.

(c) If the board of supervisors or the city council concurs with the proposed transfer of property tax revenue, the board or council shall, by resolution, notify the county auditor of the approved transfer.

(d) Upon receipt of notification from the board of supervisors or the city council, the county auditor shall make the necessary adjustments specified in subdivision (a).

(e) Prior to the adoption or approval by any local agency of a transfer of property tax revenues pursuant to this section, each local agency that will be affected by the proposed transfer shall hold a public hearing to consider the effect of the proposed transfer on fees, charges, assessments, taxes, or other revenues. Notice of the hearing shall be published pursuant to Section 6061 of the Government Code in one or more newspapers of general circulation within each affected local agency.

(f) No local agency shall transfer property tax revenue pursuant to this section unless each of the following conditions exists:

- (1) The transferring agency determines that revenues are available for this purpose.
- (2) The transfer will not result in any increase in the ratio between the amount of revenues of the transferring agency that are generated by regulatory licenses, use charges, user fees, or assessments and the amount of revenues of the transferring agency used to finance services provided by the transferring agency.
- (3) The transfer will not impair the ability of the transferring agency to provide existing services.
- (4) The transfer will not result in a reduction of property tax revenues to school entities.

History:

Added Stats 1994 ch 1167 § 3 (AB 3347). Amended Stats 2010 ch 699 § 37.5 (SB 894), effective January 1, 2011.

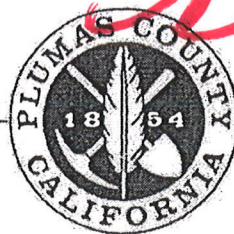
Cal Rev & Tax Code § 99.02

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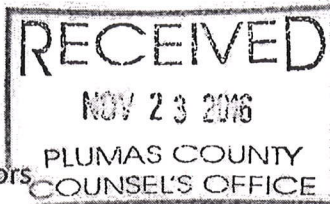
3B

PLUMAS COUNTY AUDITOR / CONTROLLER

520 MAIN STREET • ROOM 205 • QUINCY, CA 95971-4111 • (530) 283-6246 • FAX (530) 283-6442
ROBERTA M. ALLEN, CPA • AUDITOR / CONTROLLER



November 21, 2016



To:

Plumas County Board of Supervisors
Plumas County Counsel
Flood Control
Chester Cemetery

Seneca Hospital
Education
Plumas Unified School District
Feather River College

Cc:

John Benoit, LAFCO Executive Officer

From:

Roberta Allen, CPA, Auditor/Controller

Subject:

LAFCO File 2016-ANNX-0001 Brussard Annexation to Chester Public Utility District

This memo serves as your notification that proceedings have been initiated affecting certain property in your district. These proceedings concern the annexation of the Brussard Properties to Chester PUD.

Attached is an estimate of the amount of property tax revenue generated within the territory that is the subject of the jurisdictional change during the current fiscal year.

Upon receipt of this memo and attached estimates, the agencies shall commence negotiations to determine the amount of property tax revenues to be exchanged between and among the agencies. This negotiation period shall not exceed sixty days.

In the event that LAFCO modifies the proposal or its resolution of determination, any agency whose service area of responsibility would be altered may request, and the LAFCO Executive Officer shall grant, a fifteen day extension to renegotiate an exchange of property tax revenues. If the resolutions are not presented to LAFCO within the fifteen day period, all proceedings of the jurisdictional change shall automatically be terminated.

The agency may, by the adoption of a resolution of its governing board, determine to exchange any portion of its property tax revenues. Upon the agency's adoption of their resolution, the agency shall notify the County Board of Supervisors. If the County Board of Supervisors concurs with the proposed exchange of proposed property tax revenues, the Board shall, by resolution notify the County Auditor of the approved exchange.

**Plumas County Auditor/Controller
Calculation for TRA Changes**

LAFCo File 2016-ANNX-0001
Brussard Annexation to the Chester Public Utility District
Used Tax Year 2016 Assessed Gross Values

TRA 053-035

Tax Rate Area	APN's Involved	Total TRA 053-035
Assessed Value	140,360	29,976,853
Tax Amount (1%)	1,404	299,769

Jurisdiction	Increment Factor	Estimate of Taxes	Increment Factor	Current Taxes
County	30.818772%	\$ 433.00	30.818772%	\$ 92,385.00
Flood Control	0.342071%	\$ 5.00	0.342071%	\$ 1,025.00
Chester Cemetery	0.490510%	\$ 7.00	0.490510%	\$ 1,470.00
Seneca Hospital	3.443460%	\$ 48.00	3.443460%	\$ 10,322.00
Education	0.150755%	\$ 2.00	0.150755%	\$ 452.00
Plumas Unified SD	51.455124%	\$ 722.00	51.455124%	\$ 154,246.00
Feather River College	13.299308%	\$ 187.00	13.299308%	\$ 39,867.00
	100.000000%	\$ 1,404.00	100.000000%	\$ 299,767.00

Assessed Value is GROSS value and does not reflect homeowners exemption or ERAF shift amo

APN's Involved:

011-110-016-000
011-110-039-000

Schedule 2

PLUMAS COUNTY
AB8 PERCENTAGES FY 2016/17

Note: This schedule is only updat

JURISDICTION	053-035
	To 053-181/86
County	30.818772%
City of Portola	0.000000%
Crescent Mills Lighting	0.000000%
Quincy Lighting	0.000000%
Beckwourth CSA	0.000000%
Flood Control	0.342071%
Greenhorn Creek CSD	0.000000%
West Almanor CSD	0.000000%
Plumas Eureka CSD	0.000000%
CSA #11	0.000000%
Indian Valley CSD	0.000000%
Chester Cemetery	0.490510%
Cromberg Cemetery	0.000000%
Greenville Cemetery	0.000000%
Meadow Valley Cemetery	0.000000%
Mohawk Valley Cemetery	0.000000%
Portola Cemetery	0.000000%
Quincy Cemetery	0.000000%
Taylorville Cemetery	0.000000%
Prattville-Almanor Fire	0.000000%
Beckwourth Fire	0.000000%
Chester Fire	0.000000%
Crescent Mills Fire	0.000000%
Graeagle Fire	0.000000%
Hamilton Branch Fire	0.000000%
LaPorte Fire	0.000000%
Meadow Valley Fire	0.000000%
Peninsula Fire	0.000000%
Quincy Fire	0.000000%
Sierra Valley Fire	0.000000%
Eastern Plumas Rural Fire	0.000000%
Eastern Plumas Hospital	0.000000%
Indian Valley Hospital	0.000000%
Plumas Hospital	0.000000%
Seneca Hospital	3.443460%
Chester PUD - Zone A	0.000000%
Quincy CSD	0.000000%
Graeagle CSD	0.000000%
Central Plumas Rec.	0.000000%
Chester PUD	0.000000%
Clio PUD	0.000000%
Johnsville PUD	0.000000%
East Quincy Services	0.000000%
Grizzly Lake CSD	0.000000%
Gold Mountain CSD	0.000000%
Education	0.150755%
Plumas Unified SD	51.455124%
Feather River College	13.299308%
Sierra / Plumas Unified SD	0.000000%
TOTAL	100.000000%

11/21/2016

Plumas County Auditor/Controller

LAFCO file 2015-ANNX-0003 Chandler Ranch Home Sites to Quincy Fire Protection District
Using tax year 2016 Values

APN	Name	TRA	Acres	Land	Structure	Personal Prop	Total Value	Value by TRA
011-110-016-000	Brussard, Travis & Kacie	053-035	10.00	45,263			45,263	
011-110-039-000	Brussard, Travis & Kacie	053-035	40.40	\$ 95,097			95,097	
							140,360	

Asmt: 011-110-039-000 Feeparcel: 011-110-039-000 Status: ACTIVE

Owner: BROUSSARD TRAVIS & KACIE H/W

Site Address		BROUSSARD TRAVIS & KACIE H/W	
Name Address		PO BOX 1464	
		CHESTER CA 95020	
Status	ACTIVE	Status Date	01/30/2004
Taxability Code	000	Descr	NORMAL OWNERSHIP
TRA	053-035	Base Date	
Creating Doc#	2004R0000595	Create Date	01/30/2004
Current Doc#	2016R0002583	Cur Date	06/01/2015
Terminating Doc#		Term Date	
Neighborhood Code	1011	Supl Cnt	1
Asmt Description	10 VACANT LOT RESIDENTIAL		
LandUse 1	Dwell 1 0		
Zoning 1	Sqft		
Acres	SSN 2		
SSN 1			
Comments	FROM 011-110-017 & 024 FOR 2005		

Values	Taxroll	Current	Aprdate
Land	95,097	95,097	12/17/2008
Structure			
Fixtures			
Growing			
Total L&I	95,097	95,097	
FixtureRP			
M-PP			
PP			
Exemption			
Net	95,097	95,097	
Homesite			

R/C # TR/Date Status

Description

ENROLLED IS BASE YEAR

TPZ ☐ Ag Pres ☐ Etal ☒ Bonds ☐

Multi Situs ☐ 910 MH ☐ Flag 1 ☐ Flag 2 ☐

Asmt PP ☐ Tax PP ☐ Appeal ☐ Split ☐

1/2

Main | Has Notes | Ownership Detail | Ownership History | Exemptions | Mfg Homes | Attributes | Value History | Situs | Sales | Parcel Desc | 1/1 | 1/2 | 1/3 | 1/4 | 1/5 | 1/6 | 1/7 | 1/8 | 1/9 | 1/10 | 1/11 | 1/12 | 1/13 | 1/14 | 1/15 | 1/16 | 1/17 | 1/18 | 1/19 | 1/20 | 1/21 | 1/22 | 1/23 | 1/24 | 1/25 | 1/26 | 1/27 | 1/28 | 1/29 | 1/30 | 1/31 | 1/32 | 1/33 | 1/34 | 1/35 | 1/36 | 1/37 | 1/38 | 1/39 | 1/40 | 1/41 | 1/42 | 1/43 | 1/44 | 1/45 | 1/46 | 1/47 | 1/48 | 1/49 | 1/50 | 1/51 | 1/52 | 1/53 | 1/54 | 1/55 | 1/56 | 1/57 | 1/58 | 1/59 | 1/60 | 1/61 | 1/62 | 1/63 | 1/64 | 1/65 | 1/66 | 1/67 | 1/68 | 1/69 | 1/70 | 1/71 | 1/72 | 1/73 | 1/74 | 1/75 | 1/76 | 1/77 | 1/78 | 1/79 | 1/80 | 1/81 | 1/82 | 1/83 | 1/84 | 1/85 | 1/86 | 1/87 | 1/88 | 1/89 | 1/90 | 1/91 | 1/92 | 1/93 | 1/94 | 1/95 | 1/96 | 1/97 | 1/98 | 1/99 | 1/100 | 1/101 | 1/102 | 1/103 | 1/104 | 1/105 | 1/106 | 1/107 | 1/108 | 1/109 | 1/110 | 1/111 | 1/112 | 1/113 | 1/114 | 1/115 | 1/116 | 1/117 | 1/118 | 1/119 | 1/120 | 1/121 | 1/122 | 1/123 | 1/124 | 1/125 | 1/126 | 1/127 | 1/128 | 1/129 | 1/130 | 1/131 | 1/132 | 1/133 | 1/134 | 1/135 | 1/136 | 1/137 | 1/138 | 1/139 | 1/140 | 1/141 | 1/142 | 1/143 | 1/144 | 1/145 | 1/146 | 1/147 | 1/148 | 1/149 | 1/150 | 1/151 | 1/152 | 1/153 | 1/154 | 1/155 | 1/156 | 1/157 | 1/158 | 1/159 | 1/160 | 1/161 | 1/162 | 1/163 | 1/164 | 1/165 | 1/166 | 1/167 | 1/168 | 1/169 | 1/170 | 1/171 | 1/172 | 1/173 | 1/174 | 1/175 | 1/176 | 1/177 | 1/178 | 1/179 | 1/180 | 1/181 | 1/182 | 1/183 | 1/184 | 1/185 | 1/186 | 1/187 | 1/188 | 1/189 | 1/190 | 1/191 | 1/192 | 1/193 | 1/194 | 1/195 | 1/196 | 1/197 | 1/198 | 1/199 | 1/200 | 1/201 | 1/202 | 1/203 | 1/204 | 1/205 | 1/206 | 1/207 | 1/208 | 1/209 | 1/210 | 1/211 | 1/212 | 1/213 | 1/214 | 1/215 | 1/216 | 1/217 | 1/218 | 1/219 | 1/220 | 1/221 | 1/222 | 1/223 | 1/224 | 1/225 | 1/226 | 1/227 | 1/228 | 1/229 | 1/230 | 1/231 | 1/232 | 1/233 | 1/234 | 1/235 | 1/236 | 1/237 | 1/238 | 1/239 | 1/240 | 1/241 | 1/242 | 1/243 | 1/244 | 1/245 | 1/246 | 1/247 | 1/248 | 1/249 | 1/250 | 1/251 | 1/252 | 1/253 | 1/254 | 1/255 | 1/256 | 1/257 | 1/258 | 1/259 | 1/260 | 1/261 | 1/262 | 1/263 | 1/264 | 1/265 | 1/266 | 1/267 | 1/268 | 1/269 | 1/270 | 1/271 | 1/272 | 1/273 | 1/274 | 1/275 | 1/276 | 1/277 | 1/278 | 1/279 | 1/280 | 1/281 | 1/282 | 1/283 | 1/284 | 1/285 | 1/286 | 1/287 | 1/288 | 1/289 | 1/290 | 1/291 | 1/292 | 1/293 | 1/294 | 1/295 | 1/296 | 1/297 | 1/298 | 1/299 | 1/300 | 1/301 | 1/302 | 1/303 | 1/304 | 1/305 | 1/306 | 1/307 | 1/308 | 1/309 | 1/310 | 1/311 | 1/312 | 1/313 | 1/314 | 1/315 | 1/316 | 1/317 | 1/318 | 1/319 | 1/320 | 1/321 | 1/322 | 1/323 | 1/324 | 1/325 | 1/326 | 1/327 | 1/328 | 1/329 | 1/330 | 1/331 | 1/332 | 1/333 | 1/334 | 1/335 | 1/336 | 1/337 | 1/338 | 1/339 | 1/340 | 1/341 | 1/342 | 1/343 | 1/344 | 1/345 | 1/346 | 1/347 | 1/348 | 1/349 | 1/350 | 1/351 | 1/352 | 1/353 | 1/354 | 1/355 | 1/356 | 1/357 | 1/358 | 1/359 | 1/360 | 1/361 | 1/362 | 1/363 | 1/364 | 1/365 | 1/366 | 1/367 | 1/368 | 1/369 | 1/370 | 1/371 | 1/372 | 1/373 | 1/374 | 1/375 | 1/376 | 1/377 | 1/378 | 1/379 | 1/380 | 1/381 | 1/382 | 1/383 | 1/384 | 1/385 | 1/386 | 1/387 | 1/388 | 1/389 | 1/390 | 1/391 | 1/392 | 1/393 | 1/394 | 1/395 | 1/396 | 1/397 | 1/398 | 1/399 | 1/400 | 1/401 | 1/402 | 1/403 | 1/404 | 1/405 | 1/406 | 1/407 | 1/408 | 1/409 | 1/410 | 1/411 | 1/412 | 1/413 | 1/414 | 1/415 | 1/416 | 1/417 | 1/418 | 1/419 | 1/420 | 1/421 | 1/422 | 1/423 | 1/424 | 1/425 | 1/426 | 1/427 | 1/428 | 1/429 | 1/430 | 1/431 | 1/432 | 1/433 | 1/434 | 1/435 | 1/436 | 1/437 | 1/438 | 1/439 | 1/440 | 1/441 | 1/442 | 1/443 | 1/444 | 1/445 | 1/446 | 1/447 | 1/448 | 1/449 | 1/450 | 1/451 | 1/452 | 1/453 | 1/454 | 1/455 | 1/456 | 1/457 | 1/458 | 1/459 | 1/460 | 1/461 | 1/462 | 1/463 | 1/464 | 1/465 | 1/466 | 1/467 | 1/468 | 1/469 | 1/470 | 1/471 | 1/472 | 1/473 | 1/474 | 1/475 | 1/476 | 1/477 | 1/478 | 1/479 | 1/480 | 1/481 | 1/482 | 1/483 | 1/484 | 1/485 | 1/486 | 1/487 | 1/488 | 1/489 | 1/490 | 1/491 | 1/492 | 1/493 | 1/494 | 1/495 | 1/496 | 1/497 | 1/498 | 1/499 | 1/500 | 1/501 | 1/502 | 1/503 | 1/504 | 1/505 | 1/506 | 1/507 | 1/508 | 1/509 | 1/510 | 1/511 | 1/512 | 1/513 | 1/514 | 1/515 | 1/516 | 1/517 | 1/518 | 1/519 | 1/520 | 1/521 | 1/522 | 1/523 | 1/524 | 1/525 | 1/526 | 1/527 | 1/528 | 1/529 | 1/530 | 1/531 | 1/532 | 1/533 | 1/534 | 1/535 | 1/536 | 1/537 | 1/538 | 1/539 | 1/540 | 1/541 | 1/542 | 1/543 | 1/544 | 1/545 | 1/546 | 1/547 | 1/548 | 1/549 | 1/550 | 1/551 | 1/552 | 1/553 | 1/554 | 1/555 | 1/556 | 1/557 | 1/558 | 1/559 | 1/560 | 1/561 | 1/562 | 1/563 | 1/564 | 1/565 | 1/566 | 1/567 | 1/568 | 1/569 | 1/570 | 1/571 | 1/572 | 1/573 | 1/574 | 1/575 | 1/576 | 1/577 | 1/578 | 1/579 | 1/580 | 1/581 | 1/582 | 1/583 | 1/584 | 1/585 | 1/586 | 1/587 | 1/588 | 1/589 | 1/590 | 1/591 | 1/592 | 1/593 | 1/594 | 1/595 | 1/596 | 1/597 | 1/598 | 1/599 | 1/600 | 1/601 | 1/602 | 1/603 | 1/604 | 1/605 | 1/606 | 1/607 | 1/608 | 1/609 | 1/610 | 1/611 | 1/612 | 1/613 | 1/614 | 1/615 | 1/616 | 1/617 | 1/618 | 1/619 | 1/620 | 1/621 | 1/622 | 1/623 | 1/624 | 1/625 | 1/626 | 1/627 | 1/628 | 1/629 | 1/630 | 1/631 | 1/632 | 1/633 | 1/634 | 1/635 | 1/636 | 1/637 | 1/638 | 1/639 | 1/640 | 1/641 | 1/642 | 1/643 | 1/644 | 1/645 | 1/646 | 1/647 | 1/648 | 1/649 | 1/650 | 1/651 | 1/652 | 1/653 | 1/654 | 1/655 | 1/656 | 1/657 | 1/658 | 1/659 | 1/660 | 1/661 | 1/662 | 1/663 | 1/664 | 1/665 | 1/666 | 1/667 | 1/668 | 1/669 | 1/670 | 1/671 | 1/672 | 1/673 | 1/674 | 1/675 | 1/676 | 1/677 | 1/678 | 1/679 | 1/680 | 1/681 | 1/682 | 1/683 | 1/684 | 1/685 | 1/686 | 1/687 | 1/688 | 1/689 | 1/690 | 1/691 | 1/692 | 1/693 | 1/694 | 1/695 | 1/696 | 1/697 | 1/698 | 1/699 | 1/700 | 1/701 | 1/702 | 1/703 | 1/704 | 1/705 | 1/706 | 1/707 | 1/708 | 1/709 | 1/710 | 1/711 | 1/712 | 1/713 | 1/714 | 1/715 | 1/716 | 1/717 | 1/718 | 1/719 | 1/720 | 1/721 | 1/722 | 1/723 | 1/724 | 1/725 | 1/726 | 1/727 | 1/728 | 1/729 | 1/730 | 1/731 | 1/732 | 1/733 | 1/734 | 1/735 | 1/736 | 1/737 | 1/738 | 1/739 | 1/740 | 1/741 | 1/742 | 1/743 | 1/744 | 1/745 | 1/746 | 1/747 | 1/748 | 1/749 | 1/750 | 1/751 | 1/752 | 1/753 | 1/754 | 1/755 | 1/756 | 1/757 | 1/758 | 1/759 | 1/760 | 1/761 | 1/762 | 1/763 | 1/764 | 1/765 | 1/766 | 1/767 | 1/768 | 1/769 | 1/770 | 1/771 | 1/772 | 1/773 | 1/774 | 1/775 | 1/776 | 1/777 | 1/778 | 1/779 | 1/780 | 1/781 | 1/782 | 1/783 | 1/784 | 1/785 | 1/786 | 1/787 | 1/788 | 1/789 | 1/790 | 1/791 | 1/792 | 1/793 | 1/794 | 1/795 | 1/796 | 1/797 | 1/798 | 1/799 | 1/800 | 1/801 | 1/802 | 1/803 | 1/804 | 1/805 | 1/806 | 1/807 | 1/808 | 1/809 | 1/810 | 1/811 | 1/812 | 1/813 | 1/814 | 1/815 | 1/816 | 1/817 | 1/818 | 1/819 | 1/820 | 1/821 | 1/822 | 1/823 | 1/824 | 1/825 | 1/826 | 1/827 | 1/828 | 1/829 | 1/830 | 1/831 | 1/832 | 1/833 | 1/834 | 1/835 | 1/836 | 1/837 | 1/838 | 1/839 | 1/840 | 1/841 | 1/842 | 1/843 | 1/844 | 1/845 | 1/846 | 1/847 | 1/848 | 1/849 | 1/850 | 1/851 | 1/852 | 1/853 | 1/854 | 1/855 | 1/856 | 1/857 | 1/858 | 1/859 | 1/860 | 1/861 | 1/862 | 1/863 | 1/864 | 1/865 | 1/866 | 1/867 | 1/868 | 1/869 | 1/870 | 1/871 | 1/872 | 1/873 | 1/874 | 1/875 | 1/876 | 1/877 | 1/878 | 1/879 | 1/880 | 1/881 | 1/882 | 1/883 | 1/884 | 1/885 | 1/886 | 1/887 | 1/888 | 1/889 | 1/890 | 1/891 | 1/892 | 1/893 | 1/894 | 1/895 | 1/896 | 1/897 | 1/898 | 1/899 | 1/900 | 1/901 | 1/902 | 1/903 | 1/904 | 1/905 | 1/906 | 1/907 | 1/908 | 1/909 | 1/910 | 1/911 | 1/912 | 1/913 | 1/914 | 1/915 | 1/916 | 1/917 | 1/918 | 1/919 | 1/920 | 1/921 | 1/922 | 1/923 | 1/924 | 1/925 | 1/926 | 1/927 | 1/928 | 1/929 | 1/930 | 1/931 | 1/932 | 1/933 | 1/934 | 1/935 | 1/936 | 1/937 | 1/938 | 1/939 | 1/940 | 1/941 | 1/942 | 1/943 | 1/944 | 1/945 | 1/946 | 1/947 | 1/948 | 1/949 | 1/950 | 1/951 | 1/952 | 1/953 | 1/954 | 1/955 | 1/956 | 1/957 | 1/958 | 1/959 | 1/960 | 1/961 | 1/962 | 1/963 | 1/964 | 1/965 | 1/966 | 1/967 | 1/968 | 1/969 | 1/970 | 1/971 | 1/972 | 1/973 | 1/974 | 1/975 | 1/976 | 1/977 | 1/978 | 1/979 | 1/980 | 1/981 | 1/982 | 1/983 | 1/984 | 1/985 | 1/986 | 1/987 | 1/988 | 1/989 | 1/990 | 1/991 | 1/992 | 1/993 | 1/994 | 1/995 | 1/996 | 1/997 | 1/998 | 1/999 | 1/1000 | 1/1001 | 1/1002 | 1/1003 | 1/1004 | 1/1005 | 1/1006 | 1/1007 | 1/1008 | 1/1009 | 1/1010 | 1/1011 | 1/1012 | 1/1013 | 1/1014 | 1/1015 | 1/1016 | 1/1017 | 1/1018 | 1/1019 | 1/1020 | 1/1021 | 1/1022 | 1/1023 | 1/1024 | 1/1025 | 1/1026 | 1/1027 | 1/1028 | 1/1029 | 1/1030 | 1/1031 | 1/1032 | 1/1033 | 1/1034 | 1/1035 | 1/1036 | 1/1037 | 1/1038 | 1/1039 | 1/1040 | 1/1041 | 1/1042 | 1/1043 | 1/1044 | 1/1045 | 1/1046 | 1/1047 | 1/1048 | 1/1049 | 1/1050 | 1/1051 | 1/1052 | 1/1053 | 1/1054 | 1/1055 | 1/1056 | 1/1057 | 1/1058 | 1/1059 | 1/1060 | 1/1061 | 1/1062 | 1/1063 | 1/1064 | 1/1065 | 1/1066 | 1/1067 | 1/1068 | 1/1069 | 1/1070 | 1/1071 | 1/1072 | 1/1073 | 1/1074 | 1/1075 | 1/1076 | 1/1077 | 1/1078 | 1/1079 | 1/1080 | 1/1081 | 1/1082 | 1/1083 | 1/1084 | 1/1085 | 1/1086 | 1/1087 | 1/1088 | 1/1089 | 1/1090 | 1/1091 | 1/1092 | 1/1093 | 1/1094 | 1/1095 | 1/1096 | 1/1097 | 1/1098 | 1/1099 | 1/1100 | 1/1101 | 1/1102 | 1/1103 | 1/1104 | 1/1105 | 1/1106 | 1/1107 | 1/1108 | 1/1109 | 1/1110 | 1/1111 | 1/1112 | 1/1113 | 1/1114 | 1/1115 | 1/1116 | 1/1117 | 1/1118 | 1/1119 | 1/1120 | 1/1121 | 1/1122 | 1/1123 | 1/1124 | 1/1125 | 1/1126 | 1/1127 | 1/1128 | 1/1129 | 1/1130 | 1/1131 | 1/1132 | 1/1133 | 1/1134 | 1/1135 | 1/1136 | 1/1137 | 1/1138 | 1/1139 | 1/1140 | 1/1141 | 1/1142 | 1/1143 | 1/1144 | 1/1145 | 1/1146 | 1/1147 | 1/1148 | 1/1149 | 1/1150 | 1/1151 | 1/1152 | 1/1153 | 1/1154 | 1/1155 | 1/1156 | 1/1157 | 1/1158 | 1/1159 | 1/1160 | 1/1161 | 1/1162 | 1/1163 | 1/1164 | 1/1165 | 1/1166 | 1/1167 | 1/1168 | 1/1169 | 1/1170 | 1/1171 | 1/1172 | 1/1173 | 1/1174 | 1/1175 | 1/1176 | 1/1177 | 1/1178 | 1/1179 | 1/1180 | 1/1181 | 1/1182 | 1/1183 | 1/1184 | 1/1185 | 1/1186 | 1/1187 | 1/1188 | 1/1189 | 1/1190 | 1/1191 | 1/1192 | 1/1193 | 1/1194 | 1/1195 | 1/1196 | 1/1197 | 1/1198 | 1/1199 | 1/1200 | 1/1201 | 1/1202 | 1/1203 | 1/1204 | 1/1205 | 1/1206 | 1/1207 | 1/1208 | 1/1209 | 1/1210 | 1/1211 | 1/1212 | 1/1213 | 1/1214 | 1/1215 | 1/1216 | 1/1217 | 1/1218 | 1/1219 | 1/1220 | 1/1221 | 1/1222 | 1/1223 | 1/1224 | 1/1225 | 1/1226 | 1/1227 | 1/1228 | 1/1229 | 1/1230 | 1/1231 | 1/1232 | 1/1233 | 1/1234 | 1/1235 | 1/1236 | 1/1237 | 1/1238 | 1/1239 | 1/1240 | 1/1241 | 1/1242 | 1/1243 | 1/1244 | 1/1245 | 1/1246 | 1/1247 | 1/1248 | 1/1249 | 1/1250 | 1/1251 | 1/1252 | 1/1253 | 1/1254 | 1/1255 | 1/1256 | 1/1257 | 1/1258 | 1/1259 | 1/1260 | 1/1261 | 1/1262 | 1/1263 | 1/1264 | 1/1265 | 1/1266 | 1/1267 | 1/1268 | 1/1269 | 1/1270 | 1/1271 | 1/1272 | 1/1273 | 1/1274 | 1/1275 | 1/1276 | 1/1277 | 1/1278 | 1/1279 | 1/1280 | 1/1281 | 1/1282 | 1/1283 | 1/1284 | 1/1285 | 1/1286 | 1/1287 | 1/1288 | 1/1289 | 1/1290 | 1/1291 | 1/1292 | 1/1293 | 1/1294 | 1/1295 | 1/1296 | 1/1297 | 1/1298 | 1/1299 | 1/1300 | 1/1301 | 1/1302 | 1/1303 | 1/1304 | 1/1305 | 1/1306 | 1/1307 | 1/1308 | 1/1309 | 1/1310 | 1/1311 | 1/1312 | 1/1313 | 1/1314 | 1/1315 | 1/1316 | 1/1317 | 1/1318 | 1/1319 | 1/1320 | 1/1321 | 1/1322 | 1/1323 | 1/1324 | 1/1325 | 1/1326 | 1/1327 | 1/1328 | 1/1329 | 1/1330 | 1/1331 | 1/1332 | 1/1333 | 1/1334 | 1/1335 | 1/1336 | 1/1337 | 1/1338 | 1/1339 | 1/1340 | 1/1341 | 1/1342 | 1/1343 | 1/1344 | 1/1345 | 1/1346 | 1/1347 | 1/1348 | 1/1349 | 1/1350 | 1/1351 | 1/1352 | 1/1353 | 1/1354 | 1/1355 | 1/1356 | 1/1357 | 1/1358 | 1/1359 | 1/1360 | 1/1361 | 1/1362 | 1/1363 | 1/1364 | 1/1365 | 1/1366 | 1/1367 | 1/1368 | 1/1369 | 1/1370 | 1/1371 | 1/1372 | 1/1373 | 1/1374 | 1/1375 | 1/1376 | 1/1377 | 1/1378 | 1/1379 | 1/1380 | 1/1381 | 1/1382 | 1/1383 | 1/1384 | 1/1385 | 1/1386 | 1/1387 | 1/1388 | 1/1389 | 1/1390 | 1/1391 | 1/1392 | 1/1393 | 1/1394 | 1/1395 | 1/1396 | 1/1397 | 1/1398 | 1/1399 | 1/1400 | 1/1401 | 1/1402 | 1/1403 | 1/1404 | 1/1405 | 1/1406 | 1/1407 | 1/1408 | 1/1409 | 1/1410 | 1/1411 | 1/1412 | 1/1413 | 1/1414 | 1/1415 | 1/1416 | 1/1417 | 1/1418 | 1/1419 | 1/1420 | 1/1421 | 1/1422 | 1/1423 | 1/1424 | 1/1425 | 1/1426 | 1/1427 | 1/1428 | 1/1429 | 1/1430 | 1/1431 | 1/1432 | 1/1433 | 1/1434 | 1/1435 | 1/1436 | 1/1437 | 1/1438 | 1/1439 | 1/1440 | 1/1441 | 1/1442 | 1/1443 | 1/1444 | 1/1445 | 1/1446 | 1/1447 | 1/1448 | 1/1449 | 1/1450 | 1/1451 | 1/1452 | 1/1453 | 1/1454 | 1/1455 | 1/1456 | 1/1457 | 1/1458 | 1/1459 | 1/1460 | 1/1461 | 1/1462 | 1/1463 | 1/1464 | 1/1465 | 1/1466 | 1/1467 | 1/1468 | 1/1469 | 1/1470 | 1/1471 | 1/1472 | 1/1473 | 1/1474 | 1/1475 | 1/1476 | 1/1477 | 1/1478 | 1/1479 | 1/1480 | 1/1481 | 1/1482 | 1/1483 | 1/1484 | 1/1485 | 1/1486 | 1/1487 | 1/1488 | 1/1489 | 1/1490 | 1/1491 | 1/1492 | 1/1493 | 1/1494 | 1/1495 | 1/1496 | 1/1497 | 1/1498 | 1/1499 | 1/1500 | 1/1501 | 1/1502 | 1/1503 |

**California State Board of Equalization
Tax Rate Area Chart
for the 2016/17 Board Roll of State Assessed Properties
for Plumas County**

Primary: 053

TRA: 053-031
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0011] MEADOW VALLEY
15 FLOOD CONTROL [0016] COUNTY
26 HOSPITAL [0033] PLUMAS
58 ROAD-PERMANENT [0041] PLUMAS COUNTY
65 COUNTY SERVICE [0063] AREA NO. 11 (AMBULANCE)

Districts: 7

TRA: 053-032
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0006] CHESTER
15 FLOOD CONTROL [0016] COUNTY
21 FIRE PROTECTION [0026] PENINSULA
26 HOSPITAL [0034] SENECA
56 PARK & REC [0077] ALMANOR
58 ROAD-PERMANENT [0041] PLUMAS COUNTY

Districts: 8

TRA: 053-033
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0010] QUINCY-LA PORTE
15 FLOOD CONTROL [0016] COUNTY
26 HOSPITAL [0033] PLUMAS
58 ROAD-PERMANENT [0041] PLUMAS COUNTY
65 COUNTY SERVICE [0063] AREA NO. 11 (AMBULANCE)

Districts: 7

TRA: 053-034
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0009] GREENVILLE
15 FLOOD CONTROL [0016] COUNTY
26 HOSPITAL [0032] INDIAN VALLEY
56 PARK & REC [0040] INDIAN VALLEY
58 ROAD-PERMANENT [0041] PLUMAS COUNTY
64 COMM. SERVICE [0073] INDIAN VALLEY

Districts: 8

TRA: 053-035
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0006] CHESTER
15 FLOOD CONTROL [0016] COUNTY
26 HOSPITAL [0034] SENECA
56 PARK & REC [0077] ALMANOR
58 ROAD-PERMANENT [0041] PLUMAS COUNTY

Districts: 7

CURRENT TRA

TRA: 053-036
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0006] CHESTER
15 FLOOD CONTROL [0016] COUNTY
26 HOSPITAL [0034] SENECA
56 PARK & REC [0077] ALMANOR
58 ROAD-PERMANENT [0041] PLUMAS COUNTY
69 PUBLIC UTILITY [0067] CHESTER (PUD/FIRE)-ZONE A
[0082] CHESTER (PUD/FIRE)

Districts: 9

TRA: 053-037
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0006] CHESTER
15 FLOOD CONTROL [0016] COUNTY
26 HOSPITAL [0034] SENECA
56 PARK & REC [0077] ALMANOR
58 ROAD-PERMANENT [0041] PLUMAS COUNTY
69 PUBLIC UTILITY [0067] CHESTER (PUD/FIRE)-ZONE A
[0082] CHESTER (PUD/FIRE)

Districts: 9

TRA: 053-038
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0006] CHESTER
15 FLOOD CONTROL [0016] COUNTY
21 FIRE PROTECTION [0026] PENINSULA
26 HOSPITAL [0034] SENECA
56 PARK & REC [0077] ALMANOR
58 ROAD-PERMANENT [0041] PLUMAS COUNTY
64 COMM. SERVICE [0063] HAMILTON BRANCH
65 COUNTY SERVICE [0066] AREA NO. 03

Districts: 10

TRA: 053-039
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0006] CHESTER
15 FLOOD CONTROL [0016] COUNTY
21 FIRE PROTECTION [0023] HAMILTON BRANCH
26 HOSPITAL [0034] SENECA
56 PARK & REC [0077] ALMANOR
58 ROAD-PERMANENT [0041] PLUMAS COUNTY
65 COUNTY SERVICE [0058] AREA NO. 03

Districts: 9

TRA: 053-040
04 UNIFIED SCHOOL [0003] PLUMAS COUNTY
05 COMM. COLLEGE [0005] FEATHER RIVER
11 CEMETERY [0013] PORTOLA
15 FLOOD CONTROL [0016] COUNTY
21 FIRE PROTECTION [0021] EASTERN PLUMAS RURAL
26 HOSPITAL [0031] EASTERN PLUMAS
56 PARK & REC [0078] EASTERN PLUMAS
58 ROAD-PERMANENT [0041] PLUMAS COUNTY

Districts: 8

County of Plumas
ASSESSOR TO AUDITOR CERTIFIED VALUES BY TRA
Model Num: final, Tax Year: 2016

TRA	PARCEL CNT	LAND	IMPS	PERS PROP	GROSS VALUE	HOX	OTHER EXEMPT	NET VALUE
053-032								
SECURED	353	22,290,829	60,308,863	29,010	82,628,702	273,000	253,890	82,101,812
UNSECURED	48	0		498,893	498,893	0	5,380	493,513
TOTALS	401	22,290,829	60,308,863	527,903	83,127,595	273,000	259,270	82,595,325
053-033								
SECURED	33	890,301	962,125	4,420	1,856,846	28,000	0	1,828,846
UNSECURED	3	8,350	9,018	0	17,368	0	0	17,368
UTILITY	1	5,119		0	5,119	0	0	5,119
TOTALS	37	903,770	971,143	4,420	1,879,333	28,000	0	1,851,333
053-034								
SECURED	7	116,650	239,322	0	355,972	7,000	116,934	232,038
UNSECURED	1	2,228		0	2,228	0	2,228	0
TOTALS	8	118,878	239,322	0	358,200	7,000	119,162	232,038
053-035								
SECURED	624	19,615,800	10,361,053	0	29,976,853	21,000	0	29,955,853
UNSECURED	127	1,758,646	3,683,654	1,719,321	7,161,621	0	6,140	7,155,481
UTILITY	1	72,034		0	72,034	0	0	72,034
TOTALS	752	21,446,480	14,044,707	1,719,321	37,210,508	21,000	6,140	37,183,368
053-036								
SECURED	1,153	40,613,426	88,945,205	497,595	130,056,226	2,310,000	2,269,766	125,476,460
UNSECURED	163	2,800	1,318,710	6,244,027	7,565,537	0	23,862	7,541,675
TOTALS	1,316	40,616,226	90,263,915	6,741,622	137,621,763	2,310,000	2,293,628	133,018,135
053-037								
SECURED	2	90,787	1,827,174	120,850	2,038,811	0	687,781	1,351,030
TOTALS	2	90,787	1,827,174	120,850	2,038,811	0	687,781	1,351,030
053-038								
SECURED	1	615,000	16,395	0	631,395	0	0	631,395
TOTALS	1	615,000	16,395	0	631,395	0	0	631,395
053-039								
SECURED	114	4,757,453	12,845,261	0	17,602,714	308,000	126,380	17,168,334
UNSECURED	14	0		95,136	95,136	0	0	95,136
TOTALS	128	4,757,453	12,845,261	95,136	17,697,850	308,000	126,380	17,263,470
053-040								
SECURED	39	1,283,043	1,742,963	0	3,026,006	14,000	126,380	2,885,626
UNSECURED	3	0		11,070	11,070	0	0	11,070
TOTALS	42	1,283,043	1,742,963	11,070	3,037,076	14,000	126,380	2,896,696
053-041								
SECURED	12	802,345	189,409	0	991,754	0	0	991,754
TOTALS	12	802,345	189,409	0	991,754	0	0	991,754
053-042								
SECURED	9	422,196	674,129	0	1,096,325	14,000	0	1,082,325
UNSECURED	18	81,224		0	81,224	0	2,228	78,996
TOTALS	27	503,420	674,129	0	1,177,549	14,000	2,228	1,161,321

PLUMAS
LOCAL AGENCY FORMATION COMMISSION
Application Form for Changes of Organization

— LAFCO use only —

AGENCY-PROJECT	SHORT FORM DESIGNATION
CPUD File 2016-001	BRUSSARD ANNEX TO CPUD

— To be completed by applicant —

Use supplemental pages as necessary, and reference all attachments on the attachment list

1. Subject Property

PROJECT TITLE:		ADDRESS OR LOCATION:
Broussard Annexation		APN:011-110-039
		APN:011-110-016
ACREAGE: 50.40	PARCEL NO.:	

2. Proposal

Applicants request the following change of organization: Annexation into CPUD for water, sewer and fire

Services & SOLID WASTE & LIGHTING

3. Applicants

LAFCO will send copies of the staff report on the proposal to the following (maximum of 3):

NAME: Travis & Kacie Broussard	PHONE: 530-592-7027
ADDRESS: PO BOX 1464 Chester CA 96020	
EMAIL: <u>kacielhowell@gmail.com</u>	

NAME: CPUD	PHONE: 530-258-2171
ADDRESS: PO BOX 503 Chester CA 96020	
EMAIL:	

NAME:	PHONE:
ADDRESS:	
EMAIL:	

4. Authority to File Application

☒X Petition of landowners or registered voters ☐ Resolution of Application of an affected agency

August 2014

Plumas LAFCO Application Form Project #: 2016-0001

Certified copies of the Petition or Resolution of Application are included as Attachment 2.

Petitions and Resolutions of Application must meet certain legal requirements. The Application Instructions include samples for applicant use.

5. Statement of Justification

Provide a Statement of Justification for and explain the purpose of each request for change of organization. Include in the statement reasons why the proposal is more effective than the present organization and/or what services to the area are to be enhanced by the project. If any terms or conditions are proposed for this project, include them in the statement.

A Statement of Justification for this proposal is included as Attachment 1.

6. Boundaries

- An 8.5 x 11 map of the subject territory meeting the specifications listed in the Application Instructions is included as Attachment _____.
- A legal description of the boundaries of the subject territory meeting the specifications listed in the Application Instructions is included as Attachment _____.
- Describe how the boundaries of this proposal were determined. The boundaries were determined _____
by NST _____

- This proposal X is _____ is not (check one) consistent with the sphere of influence of all the affected agencies. (If you are not sure of each agency's sphere boundaries, check with LAFCO staff.)
- Describe access to the area. The access to the property is off of Wagon Road _____

7. Neighboring Properties NA

- A Public Notice List meeting the specifications listed in the Application Instructions is included as Attachment _____.
- Have surrounding property owners been canvassed for participation in the proposal? _____
Results of any survey of surrounding property owners are included as Attachment _____.

8. Land Use

- Describe existing land use within the subject property. The land is not being utilized at this time

- Does this proposal conform to the General Plan designation for the territory? Yes _____
- Have any zoning changes, General Plan amendments, subdivision maps, or conditional use permits been applied for on the subject property?
NO _____
Copies of any such maps and/or applications or entitlements are included as Attachment _____.
- Will any such applications be made after approval of this proposal? Yes _____
If yes, please explain. To have water, sewer and fire to a single family dwelling _____

- If this proposal is for an annexation to a city, a prezone map and adopted city resolution is

August 2014

Plumas LAFCO Application Form Project #: 2016-0001
included as Attachment _____.

f. Does the project involve agricultural or open space lands? No _____.

9. Public Services

a. Please indicate which agencies presently provide public services to the subject territory, and which are proposed to provide service. If you are uncertain, you may leave spaces blank.

Service	Present Provider	Proposed Provider
Fire Protection	—	CPUD
Police Protection	Sheriff	PLUMAS CO SHERIFF
Domestic Water Service	—	CPUD
Agricultural Water Service	N/A	
Sewer Service	—	CPUD
Solid Waste	PLUMAS CO.	PLUMAS COUNTY CPUD
Road/Street Maintenance	PLUMAS CO	PLUMAS COUNTY
Snow Removal	PLUMAS CO	PLUMAS COUNTY
Power	PG & E	PG&E
Street Lighting	PLUMAS CO	PLUMAS COUNTY CPUD
Planning & Zoning Authority	PLUMAS COUNTY	PLUMAS COUNTY
Schools	PUSD	PLUMAS UNIFIED SCHOOL DISTRICT

b. What effect will approval of this proposal have on the type or level of services *within* the subject property? _____
NA _____

c. What effect will approval of this proposal have on public services *outside* the subject property? _____
NA _____

d. Will approval of this proposal place additional burdens on a public service provider? If so, what revenue will the change in organization generate to compensate the provider for the additional services? _____
NO _____

e. Have the affected agencies been notified of this proposal (per G.C. 56654 (b))? CPUD _____

A list of agencies who have received notification is included as Attachment _____.

10. Population

Estimate whether the subject territory contains:

____ 12 or more registered voters. X Less than 12 registered voters.

11. Property Tax Exchange

An agreement for property tax exchange (if relevant) must be in place prior to LAFCO considering this change of organization. The Tax and Revenue Code requires negotiation of such an agreement to be completed within up to 90 days of initiation or in compliance 99b of the Revenue and Taxation Code, or the LAFCO application proceeding will be considered terminated. To assure satisfaction of this requirement, LAFCO requires applications to be accompanied by documentation that property tax negotiations have been completed (See Attachment #7 to the LAFCO Application Instructions, Plumas County Property Tax Exchange Guidelines).

- a. If this application includes a Resolution of Application, does the Resolution include or reference documentation that the agencies are in agreement with regards to a Tax Exchange Agreement?
NA
- b. If this application includes a petition, documentation of applicants' request that the affected agencies initiate tax exchange negotiations is included as Attachment _____.

12. Feasibility of Proposal NA

- a. What revenue will this proposal require for the accomplishment of its goals and what are the prospective sources of such revenues? _____
 If the proposal involves a granting of an additional service, consolidation, incorporation, or formation, a 5 - year projected budget is included as Attachment _____.
- b. Is a new tax or assessment being proposed as a part of this project? _____
 If so, a thorough discussion of how the service will utilize the tax or assessment, as well as the legal authority for the agency to utilize the tax or assessment is included as Attachment _____.
- c. Have agreements to mitigate the financial effects of this proposal been established with present service providers? _____
 If so, signed copies of these agreements are included as Attachment _____.

13. Environmental Compliance

- a. Is the applicant agency acting as ☐ Lead Agency or ☐ Responsible Agency (*check one*) for purposes of California Environmental Quality Act (CEQA) compliance?
- i. Indicate what the Lead Agency has done to comply with the requirements of CEQA.
☒ X Categorical Exemption from CEQA _____ Negative Declaration
 _____ Environmental Impact Report _____ Other (*please specify*): _____
- ii. Copies of the complete environmental documentation prepared by the Lead Agency (including the initial study, any technical reports, and any written comments or recorded public testimony relative to the environmental documents), and a copy of the Notice of Determination, showing the date filed with the County Clerk, are included as Attachment _____.
If you are not sure what constitutes the complete environmental documentation, consult with the appropriate staff at the Lead Agency.
- iii. Was the environmental documentation circulated to the Plumas County Local Agency Formation Commission prior to adoption by the Lead Agency? ☐ _____ Yes _____ No
 If yes, copies of any comments made by LAFCO relative to the project, and any Lead Agency responses are included as Attachment _____.

Note for Sphere of Influence Proposals and Updates: Should an agency desire to include more territory within its Sphere of Influence all additional CEQA costs must be paid by that agency prior to the Commission approving the Sphere of Influence Update.

August 2014

Plumas LAFCO Application Form Project #: 2016-0001

If the applicant agency has declined to act as Lead Agency, and the applicant wishes LAFCO to assume this responsibility, applicant must **Request for LAFCO to Act as Lead Agency**.

14. Disclosure Requirements and Certification Pursuant to Government Code Sections 56700.1 and 57009 of the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000, and 82015 and 82025 of the Political Reform Act applicants for LAFCO approvals and those opposing such proposals are required to report to LAFCO all political contributions and expenditures with respect to the proposal that exceed \$1,000. LAFCO has adopted policies to implement the law, which are attached to this application (attachment #8 to application instructions). By your signature to this application, you are binding the applicant to abide by these disclosure requirements. You are further agreeing that should LAFCO be required to enforce these requirements against you (or if the agency is the formal applicant, the real party in interest) that you will reimburse LAFCO for all staff cost and legal fees, and litigation expenses incurred in that enforcement process. Applicants request that proceedings as described in this application be taken in accordance with the provisions of Government Code sections 56000 *et seq.* and hereto affix their signatures:

Date	Signature	Printed Name	Title
9/28/16	K. Bloussard	Kacie Bloussard	owner
9/28/16	[Signature]	Traus Bloussard	owner

NOTE:

Applications will not be accepted without the signature of one or more of the following: 1) the legal owner(s) or official agents with Power of Attorney or written authorization to sign (a copy of which must be attached); 2) Chief Petitioners; 3) Chair of the Legislative Body submitting a Resolution of Application.

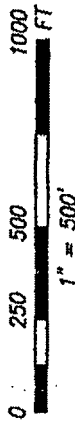
Applicants must also sign and date **Agreement to Pay**; the Application will be considered incomplete until that form is submitted.

Project #: 2016-0001

Proposal Name Broussard Annexation

Applicant TRANS 3 KARE BHIMSAH

6



TAX RATE AREA:
53-035

- APN: 011-110-039
COURSES:
- ① S 89°17'00" W 563.98'
 - ② N 00°34'25" W 1150.92'
 - ③ S 89°27'49" W 763.24'
 - ④ N 00°32'12" W 175.00'
 - ⑤ N 00°32'12" W 664.16'
 - ⑥ N 89°33'15" E 1325.39'
 - ⑦ S 00°36'39" E 662.07'
 - ⑧ S 00°36'39" E 1324.15'

APN: 011-110-016
10.00 ac
The NW 1/4 of the
NE 1/4 of the SE 1/4
of SECTION 31,
T.29N., R.7E. MDB&M

APN: 011-110-039
40.40 ac

- PROPOSED CHESTER PUBLIC UTILITY DISTRICT BOUNDARY
- EXISTING CHESTER PUBLIC UTILITY DISTRICT BOUNDARY
- SECTIONAL BREAKDOWN
- CURRENT CHESTER PUBLIC UTILITY DISTRICT SPHERE OF INFLUENCE

POINT OF BEGINNING

32
31
5

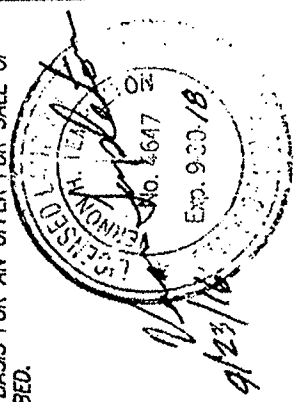
T. 29 N., R. 7 E. MDB&M
T. 28 N., R. 7 E. MDB&M

1
6
5



LOCATION MAP
1" = 2000'

DISCLAIMER:
FOR ASSESSMENT PURPOSES ONLY. THIS DESCRIPTION
OF LAND IS NOT A LEGAL PROPERTY DESCRIPTION AS
DEFINED IN THE SUBDIVISION MAP ACT AND MAY NOT
BE USED AS THE BASIS FOR AN OFFER FOR SALE OF
THE LAND DESCRIBED.



ASSESSOR'S PARCEL NUMBERS: 011-110-016 & 039	LAPCO RESOLUTION No	DATE: 09/23/16	SCALE: 1" = 500'
CHESTER ANNEXATION No			
BEING A PORTION OF SECTION 31, T. 29 N., R. 7 E. MDB&M PLUMAS COUNTY			
NST Engineering, Inc. 1495 Riverside Drive Susanville, CA 96130 (530) 257-5173 Job No. 2016-077			

ANNEXATION No. _____

ANNEXATION TO CHESTER PUBLIC UTILITY DISTRICT

GEOGRAPHIC DESCRIPTION

All that certain real property, situate in portion of section 31, Township 29 North, Range 7 East, Mount Diablo Base and Meridian, in the County of Plumas, State of California, described as follows:

The Northwest 1/4 of the Northeast 1/4 of the Southeast 1/4, and containing 10.00 acres of land more or less. Together with that portion of said Southeast 1/4 more particularly described as follows:

Beginning at the southeast corner of section 31, also being the existing Chester Public Utility District boundary;

Thence, (1) South 89°17'00" West 563.98 feet;

Thence, leaving the existing district boundary, (2) North 00°34'25" West 1150.92 feet;

Thence, (3) South 89°27'49" West 763.24 feet;

Thence, (4) North 00°32'12" West 175.00 feet;

Thence, (5) North 00°32'12" West 664.16 feet;

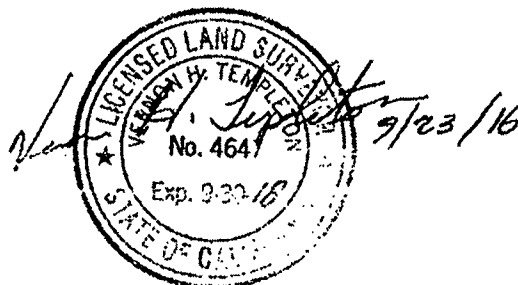
Thence, (6) North 89°33'15" East 1325.39 feet;

Thence, (7) South 00°36'39" East 662.07 feet;

Thence, (8) South 00°36'39" East 1324.15 feet to the **Point of beginning**, and containing 40.40 acres of land more or less.

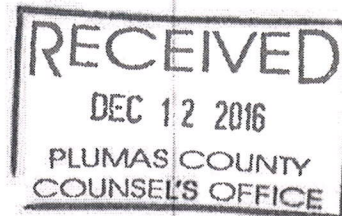
Total computed acreage containing 50.40 acres more or less.

For assessment purposes only. This description of land is not a legal property description as defined in the Subdivision Map Act and may not be used as the basis for an offer for sale of the land described.



QUINCY FIRE PROTECTION DISTRICT

505 Lawrence Street, Quincy, CA 95971 quincyfire@sbcglobal.net (530) 283-0870 Fax: (530) 283-0897



Dec. 8, 2016

Plumas County Board of Supervisors

520 Main Street, Room 309

Quincy, Ca. 95971

Subject: Revenue and Taxation Code Section 99 (K)

Dear Honorable Board of Supervisors,

The Quincy Fire Department and Fire Protection District has served the residents in the Quincy and American Valley area since 1878. In those 138 years, the Department and District have agreed to expand our service to newly developing areas within the region as a matter of public service. Historically, funding for fire protection service within the District is predominately local property tax dollars. As you know, in recent years the District has found it necessary to augment the property tax revenue stream with additional support in the form a Special Tax Assessment. With the ever increasing regulatory requirements and the strain of the inflationary pressures on costs the District has a fiduciary responsibility to continually review both income streams and expenditures.

With your board's full cooperation and support, the Quincy Protection District recently annexed and negotiated a Tax Exchange Agreement (TEA) with Plumas County in conjunction with the Chandler Ranch Homesites Subdivision. That subdivision was initially developed without being annexed to a fire protection district. This situation is typical of developments that occurred during that era. Fortunately, the new leadership at LAFCO appears to be committed to insuring that problems of this nature and the lack of proper tax negotiations will not occur going forward. As our District studied that annexation, it was noted that the district provides service in a number of Tax Rate Areas. It was also noted by County Counsel during the Chandler negotiations — and for reasons not clearly understood by those present at that meeting — that the District is currently not receiving a revenue share in seven of the tax rate areas we serve. We believe it's not only important, but certainly fair that we "level the playing field" and correct this oversight for all concerned. It is for that reason that the District is making a formal request to open Tax Negotiations as authorized in Revenue and Taxation Code section 99 (K).

QUINCY FIRE PROTECTION DISTRICT

505 Lawrence Street, Quincy, CA 95971 quincyfire@sbcglobal.net (530) 283-0870 Fax: (530) 283-0897



For your review, here are the tax rate areas and our estimated incremental share for 2017:

Quincy Fire Protection District

Tax Rate Areas with No Current Revenue Share

				1% Tax
				QFPD
				Tax Share@
<u>Tax Rate Area</u>	<u>2016</u> <u>Net Value</u>	<u>2017</u> <u>EST. Net Value (+2%)</u>	<u>(2016)</u> <u>Increment</u>	<u>7.785975%</u>
053-000	\$606,936	\$619,075	\$ 12,139	\$ 9.45
053-092	\$11,296,463	\$11,522,392	\$225,929	\$ 175.90
053-105	\$3,374,831	\$3,442,327	\$67,496	\$ 52.55
053-106	\$272,747	\$278,202	\$5,455	\$ 4.25
053-110	\$6,338,070	\$6,464,831	\$126,761	\$ 98.70
053-113	\$1,303,049	\$1,329,110	\$26,061	\$ 20.29
053-136	\$1,448,169	\$1,477,132	\$28,963	<u>\$ 22.55</u>
Estimated New Revenue due to increment in above TRAs for 2017				\$382.97

As you can see, the revenue impact of these negotiations to the county's general fund is minimal and prospective in nature. Successful completion of these tax negotiations will resolve historic lapses in the LAFCO process. Clearly, these negotiations will not replace the revenues to the District that would have been received had proper negotiations been completed at the time of the annexations. That said, the District makes this request looking forward.

Thank you in advance for your prompt consideration of this request. Feel free to contact me should you have any questions.

Sincerely

A handwritten signature in black ink, appearing to read "Mike Taborski", is written over a light blue horizontal line.

Michael Taborski

Chairman

Quincy Fire Protection District



OFFICE OF THE
COUNTY COUNSEL
COUNTY OF PLUMAS

Plumas County Courthouse
520 Main Street, Room 301
Quincy, California 95971-9115

R. CRAIG SETTLEMIRE
COUNTY COUNSEL
STEPHEN L. MANSELL
DEPUTY COUNTY COUNSEL
MARI SNYDER
PARALEGAL/SMALL CLAIMS ADVISOR

Phone: (530) 283-6240
Fax: (530) 283-6116

January 6, 2017

MEMORANDUM

TO: Honorable Board of Supervisors, County of Plumas

FROM: R. Craig Settlemire, *Plumas County Counsel*

A handwritten signature in cursive script, reading "R. Craig Settlemire", written over a horizontal line.

SUBJECT: Post-Annexation Property Tax Transfer Request from Quincy Fire Protection District (for the meeting on January 17, 2017)

Background:

The Quincy Fire Protection District (the "District") has requested that the County of Plumas transfer 7.785975% of *ad valorem* property tax revenue from the property tax increment in seven (7) tax rate areas ("TRAs") within the District to the Quincy Fire Protection District. (See Attachment "A" for a copy of Quincy Fire Protection District letter to the Plumas County Board of Supervisors dated Dec. 8, 2016.) In its letter, the District states that "for reasons not clearly understood" the District "is currently not receiving a revenue share in seven of the tax rate areas we serve." While the District acknowledges the reasons for these circumstances are not clearly understood, the District nevertheless asserts that, "We believed it's not only important, but certainly fair that we 'level the playing field' and correct this oversight for all concerned" The District provides no historical background on how seven TRAs were annexed to the District without an exchange of property tax revenue. The District also provides no information in support of its statement that this action "will resolve historic lapses in the LAFCO process." The District suggests that "proper negotiations" were not "completed at the time of the annexations" but provides no facts in support of that conclusion.

Applicable Law and Policy:

Sections 99 and 99.01 of the Revenue and Taxation Code (see Attachment "B") provide that in the event of an annexation ("jurisdictional change") that will result in a special district providing services to an area where those services have not been previously provided, the local agencies receiving property tax revenue are to enter into negotiations for the possible exchange of property tax revenue from the property tax increment with the agency providing the new services. Since the seven (7) TRAs under discussion are already in the District, we may

TO: Honorable Board of Supervisors, County of Plumas
FROM: R. Craig Settlemyre, *Plumas County Counsel*
SUBJECT: Post-Annexation property Tax Transfer Request from Quincy Fire Protection District (for the meeting on January 17, 2017)

January 6, 2016

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presume, in absence of facts to the contrary, that such negotiations have already taken place resulting in no exchange of property tax revenue.

After an annexation has been completed, participation in *post*-annexation property tax exchange negotiations, such as this proposal, is voluntary and subject to statutory restrictions. Subdivision (k) of Revenue and Taxation Code section 99 provides:

(k) At any time after a jurisdictional change is effective, any of the local agencies party to the agreement to exchange property tax revenue *may renegotiate the agreement* with respect to the current fiscal year or subsequent fiscal years, subject to approval by all local agencies affected by the renegotiation.

[Italics added for emphasis.]

The use of the word “*may*” indicates that renegotiation are *permissive*, not mandatory. Revenue and Taxation Code section 99.02(b) also uses the permissive “*may*” when it provides that, “[A]ny local agency *may*, by the adoption of a resolution of its governing body or governing board, determine to transfer any portion of its property tax revenues”

However, before an exchange can be made, Revenue and Taxation Code section 99.02 (see Attachment “C” for the full text) requires the following procedures and conditions:

- A. Both agencies are required to hold a **public hearing**, “. . . to consider the effect of the proposed transfer on fees, charges, assessments, taxes, or other revenues.” Notice of the public hearing shall be published in the newspaper.
- B. The adoption of a **Resolution** determining the portion of property taxes transferred.
- C. No local agency shall transfer property tax revenue pursuant to this section unless **each of the following conditions exists**:
 - (1) The transferring agency determines that revenues are available for this purpose.
 - (2) The transfer will not result in any increase in the ratio between the amount of revenues of the transferring agency that are generated by regulatory licenses, use charges, user fees, or assessments and the amount of revenues of the transferring agency used to finance services provided by the transferring agency.
 - (3) The transfer will not impair the ability of the transferring agency to provide existing services.

TO: Honorable Board of Supervisors, County of Plumas
FROM: R. Craig Settlemyre, *Plumas County Counsel*
SUBJECT: Post-Annexation property Tax Transfer Request from Quincy Fire Protection District (for the meeting on January 17, 2017)

January 6, 2016

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(4) The transfer will not result in a reduction of property tax revenues to school entities.

In addition to the foregoing statutory requirements, on December 18, 2007, the Plumas County Board of Supervisors approved "Guidelines for Tax Exchange Negotiations for Annexations" (see Attachment "D"). The Guidelines require a district seeking to receive an exchange of a portion of the County share of the property tax increment provide specific information in support of the request, and that the district approve a special tax, assessment, or other funding mechanism prior to the County agreement to a tax exchange. In addition, any emergency response district is expected to implement a "cost reimbursement system." A copy of the Guidelines was initially provided to the District on June 12, 2015, and again on September 3, 2015, in connection with the recent annexation of the Chandler Ranch subdivision. The District has not provided information specifically responding to the Guidelines in connection with this request.

The information provided by the District in support of its request, that the hypothetical cost to the County is only \$382.97 from 2016 to 2017, is incomplete. The District's estimate only takes into account Proposition 13's inflation adjustment limit of two percent (2%) per year. The District does not consider reassessments because of new construction, changes of ownership, or recovery of Prop 8 values due to appreciation the "Great Recession" that could exceed two percent.

The current allocations of property tax to the County in the seven TRAs are as follows:

TRA	53-000	53-092	53-105	53-106	53-110	53-113	53-136
County Share	27.55009	27.55009	24.84956	27.55009	27.55009	27.55009	27.55009
Requested Transfer	7.785975	7.785975	7.785975	7.785975	7.785975	7.785975	7.785975
% Reduction	-28.3%	-28.3%	-31.3%	-28.3%	-28.3%	-28.3%	-28.3%

Clearly, the District sees this as a precedent intended to cure "historic lapses" and the lack of "proper negotiations at the time of annexation." If so, the District has provided no data as to the cost to the County if other special districts make the same request.

Possible Actions Available to the Board of Supervisors:

Procedurally, the Board is not in a position to grant the request either in whole or in part because this agenda item has not been noticed as a public hearing and there is no resolution for the Board to adopt at this meeting. The Board could direct staff to give notice of a public hearing for a specific date and direct the preparation of a draft resolution for the Board to consider.

TO: Honorable Board of Supervisors, County of Plumas
FROM: R. Craig Settlemyre, *Plumas County Counsel*
SUBJECT: Post-Annexation property Tax Transfer Request from Quincy Fire Protection District (for the meeting on January 17, 2017)

January 6, 2016

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Except for denying this request outright, the Board of Supervisors lacks sufficient information to grant the request in whole or in part.

Since post-annexation property tax exchanges are voluntary, the Board can summarily decline to engage in any negotiations, thereby concluding the matter. While no reason need be given for declining to negotiate, the Board can point to recent budget difficulties as to support a determination that the transfer of property tax revenues could impair the ability of the County to deliver its services, thereby preventing the Board from making the necessary findings required by Section 99.02(f) that 1) the County has the revenue available to transfer; and 2) that the transfer would not impair the ability of the County to deliver services.

If the Board is inclined to consider the request and possibly grant it in whole or in part, the Board will need more facts and data to make an informed decision. The Board could direct:

1. That the District provide all the information called for by the Guidelines.
2. The District provide documentation and other facts supporting the statements that:
 - a. There were "historic lapses in the LAFCO process" that resulted in the District not receiving a share of property tax revenue upon annexation.
 - b. That "proper negotiations" were not "completed at the time of annexation."
 - c. How the proposal would "level the playing field" and "correct this oversight."

Upon receipt of the information from the District, that staff:

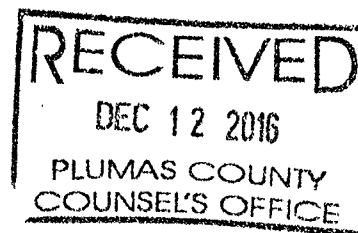
3. Review the information provided by the District.
4. Analyze the potential cost to the County in property tax revenue at 1 year, 10 years, and 50 years of the proposal if applied:
 - a. Relating to the subject TRAs.
 - b. Relating to TRAs in all other special districts with Plumas County for which there is a zero property tax share to that special district.
 - c. Relating to TRAs that are within every special district's sphere of influence.
 - d. Relating to all TRAs that are not currently within a fire protection district.

END OF MEMORANDUM

[Y:\Memos\BOS Memo re Property Tax Negotiations -- Quincy Fire request 20161208.doc]

QUINCY FIRE PROTECTION DISTRICT

505 Lawrence Street, Quincy, CA 95971 quincyfire@sbcglobal.net (530) 283-0870 Fax: (530) 283-0897



Dec. 8, 2016

Plumas County Board of Supervisors

520 Main Street, Room 309

Quincy, Ca. 95971

Subject: Revenue and Taxation Code Section 99 (K)

Dear Honorable Board of Supervisors,

The Quincy Fire Department and Fire Protection District has served the residents in the Quincy and American Valley area since 1878. In those 138 years, the Department and District have agreed to expand our service to newly developing areas within the region as a matter of public service. Historically, funding for fire protection service within the District is predominately local property tax dollars. As you know, in recent years the District has found it necessary to augment the property tax revenue stream with additional support in the form a Special Tax Assessment. With the ever increasing regulatory requirements and the strain of the inflationary pressures on costs the District has a fiduciary responsibility to continually review both income streams and expenditures.

With your board's full cooperation and support, the Quincy Protection District recently annexed and negotiated a Tax Exchange Agreement (TEA) with Plumas County in conjunction with the Chandler Ranch Homesites Subdivision. That subdivision was initially developed without being annexed to a fire protection district. This situation is typical of developments that occurred during that era. Fortunately, the new leadership at LAFCO appears to be committed to insuring that problems of this nature and the lack of proper tax negotiations will not occur going forward. As our District studied that annexation, it was noted that the district provides service in a number of Tax Rate Areas. It was also noted by County Counsel during the Chandler negotiations — and for reasons not clearly understood by those present at that meeting — that the District is currently not receiving a revenue share in seven of the tax rate areas we serve. We believe it's not only important, but certainly fair that we "level the playing field" and correct this oversight for all concerned. It is for that reason that the District is making a formal request to open Tax Negotiations as authorized in Revenue and Taxation Code section 99 (K).

QUINCY FIRE PROTECTION DISTRICT

505 Lawrence Street, Quincy, CA 95971 quincyfire@sbcglobal.net (530) 283-0870 Fax: (530) 283-0897



For your review, here are the tax rate areas and our estimated incremental share for 2017:

Quincy Fire Protection District

Tax Rate Areas with No Current Revenue Share

				1% Tax
				QFPD
				Tax Share@
<u>Tax Rate Area</u>	<u>2016</u> <u>Net Value</u>	<u>2017</u> <u>EST. Net Value (+2%)</u>	<u>(2016)</u> <u>Increment</u>	<u>7.785975%</u>
053-000	\$606,936	\$619,075	\$ 12,139	\$ 9.45
053-092	\$11,296,463	\$11,522,392	\$225,929	\$ 175.90
053-105	\$3,374,831	\$3,442,327	\$67,496	\$ 52.55
053-106	\$272,747	\$278,202	\$5,455	\$ 4.25
053-110	\$6,338,070	\$6,464,831	\$126,761	\$ 98.70
053-113	\$1,303,049	\$1,329,110	\$26,061	\$ 20.29
053-136	\$1,448,169	\$1,477,132	\$28,963	\$ 22.55
Estimated New Revenue due to increment in above TRAs for 2017				\$382.97

As you can see, the revenue impact of these negotiations to the county's general fund is minimal and prospective in nature. Successful completion of these tax negotiations will resolve historic lapses in the LAFCO process. Clearly, these negotiations will not replace the revenues to the District that would have been received had proper negotiations been completed at the time of the annexations. That said, the District makes this request looking forward.

Thank you in advance for your prompt consideration of this request. Feel free to contact me should you have any questions.

Sincerely

A handwritten signature in black ink, appearing to read "Mike Taborski".

Michael Taborski

Chairman

Quincy Fire Protection District

EXHIBIT A

Page 2 of 2

§ 99. Allocation of property tax revenues when jurisdictional changes occur; Notice; Property tax transfer agreement; Community college annexation; Renegotiation

- (a) For the purposes of the computations required by this chapter:
- (1) In the case of a jurisdictional change, other than a city incorporation, city disincorporation, or a formation of a district as defined in Section 2215, the auditor shall adjust the allocation of property tax revenue determined pursuant to Section 96 or 96.1, or the annual tax increment determined pursuant to Section 96.5, for local agencies whose service area or service responsibility would be altered by the jurisdictional change, as determined pursuant to subdivision (b) or (c).
 - (2) In the case of a city incorporation or disincorporation, the auditor shall assign the allocation of property tax revenues determined pursuant to Section 56810 of the Government Code and the adjustments in tax revenues that may occur pursuant to Section 56815 of the Government Code to the newly formed city or district and shall make the adjustment as determined by Section 56810 or 56813 in the allocation of property tax revenue determined pursuant to Section 96 or 96.1 for each local agency whose service area or service responsibilities would be altered by the incorporation.
 - (3) In the case of a formation of a district as defined in Section 2215, the auditor shall assign the allocation of property tax revenues determined pursuant to Section 56810 of the Government Code to the district and shall make the adjustment as determined by Section 56810, or for the disincorporated city or dissolved district as determined by Section 56813, in the allocation of property tax revenue determined pursuant to Section 96 or 96.1 for each local agency whose service area or service responsibilities would be altered by the change of organization.
- (b) Upon the filing of an application or a resolution pursuant to the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (Division 3 (commencing with Section 56000) of Title 5 of the Government Code), but prior to the issuance of a certificate of filing, the executive officer shall give notice of the filing to the assessor and auditor of each county within which the territory subject to the jurisdictional change is located. This notice shall specify each local agency whose service area or responsibility will be altered by the jurisdictional change.
- (1)
 - (A) The county assessor shall provide to the county auditor, within 30 days of the notice of filing, a report which identifies the assessed valuations for the territory subject to the jurisdictional change and the tax rate area or areas in which the territory exists.
 - (B) The auditor shall estimate the amount of property tax revenue generated within the territory that is the subject of the jurisdictional change during the current fiscal year.
 - (2) The auditor shall estimate what proportion of the property tax revenue determined pursuant to paragraph (1) is attributable to each local agency pursuant to Sections 96.1 and 96.5.
 - (3) Within 45 days of notice of the filing of an application or resolution, the auditor shall notify the governing body of each local agency whose service area or service responsibility will be altered by the jurisdictional change of the amount of, and allocation factors with respect to, property tax revenue estimated pursuant to paragraph (2) that is subject to a negotiated exchange.
 - (4) Upon receipt of the estimates pursuant to paragraph (3), the local agencies shall commence negotiations to determine the amount of property tax revenues to be exchanged between and among the local agencies. Except as otherwise provided, this negotiation period shall not exceed 60 days. If a local agency involved in these negotiations notifies the other local agencies, the county auditor, and the local agency formation commission in writing of its desire to extend the negotiating period, the negotiating period shall be 90 days.

The exchange may be limited to an exchange of property tax revenues from the annual tax increment generated in the area subject to the jurisdictional change and attributable to the local agencies whose service area or service

responsibilities will be altered by the proposed jurisdictional change. The final exchange resolution shall specify how the annual tax increment shall be allocated in future years.

- (5) In the event that a jurisdictional change would affect the service area or service responsibility of one or more special districts, the board of supervisors of the county or counties in which the districts are located shall, on behalf of the district or districts, negotiate any exchange of property tax revenues. Prior to entering into negotiation on behalf of a district for the exchange of property tax revenue, the board shall consult with the affected district. The consultation shall include, at a minimum, notification to each member and executive officer of the district board of the pending consultation and provision of adequate opportunity to comment on the negotiation.
- (6) Notwithstanding any other provision of law, the executive officer shall not issue a certificate of filing pursuant to Section 56658 of the Government Code until the local agencies included in the property tax revenue exchange negotiation, within the negotiation period, present resolutions adopted by each such county and city whereby each county and city agrees to accept the exchange of property tax revenues.
- (7) In the event that the commission modifies the proposal or its resolution of determination, any local agency whose service area or service responsibility would be altered by the proposed jurisdictional change may request, and the executive officer shall grant, 30 days for the affected agencies, pursuant to paragraph (4), to renegotiate an exchange of property tax revenues. Notwithstanding the time period specified in paragraph (4), if the resolutions required pursuant to paragraph (6) are not presented to the executive officer within the 30-day period, all proceedings of the jurisdictional change shall automatically be terminated.
- (8) In the case of a jurisdictional change that consists of a city's qualified annexation of unincorporated territory, an exchange of property tax revenues between the city and the county shall be determined in accordance with subdivision (e) if that exchange of revenues is not otherwise determined pursuant to either of the following:
 - (A) Negotiations completed within the applicable period or periods as prescribed by this subdivision.
 - (B) A master property tax exchange agreement among those local agencies, as described in subdivision (d).

For purposes of this paragraph, a qualified annexation of unincorporated territory means an annexation, as so described, for which an application or a resolution was filed on or after January 1, 1998, and on or before January 1, 2021.
- (9) No later than the date on which the certificate of completion of the jurisdictional change is recorded with the county recorder, the executive officer shall notify the auditor or auditors of the exchange of property tax revenues and the auditor or auditors shall make the appropriate adjustments as provided in subdivision (a).
- (e) Whenever a jurisdictional change is not required to be reviewed and approved by a local agency formation commission, the local agencies whose service area or service responsibilities would be altered by the proposed change, shall give notice to the State Board of Equalization and the assessor and auditor of each county within which the territory subject to the jurisdictional change is located. This notice shall specify each local agency whose service area or responsibility will be altered by the jurisdictional change and request the auditor and assessor to make the determinations required pursuant to paragraphs (1) and (2) of subdivision (b). Upon notification by the auditor of the amount of, and allocation factors with respect to, property tax subject to exchange, the local agencies, pursuant to the provisions of paragraphs (4) and (6) of subdivision (b), shall determine the amount of property tax revenues to be exchanged between and among the local agencies. Notwithstanding any other provision of law, no such jurisdictional change shall become effective until each county and city included in these negotiations agrees, by resolution, to accept the negotiated exchange of property tax revenues. The exchange may be limited to an exchange of property tax revenue from the annual tax increment generated in the area subject to the jurisdictional change and attributable to the local agencies whose service area or service responsibilities will be altered by the proposed jurisdictional change. The final exchange resolution shall specify how the annual tax increment shall be allocated in future years. Upon the adoption of the resolutions required pursuant to this section, the adopting agencies shall notify the auditor who shall make the appropriate adjustments as provided in subdivision (a). Adjustments in property tax allocations made as the result of a city or library district withdrawing from a county free library system pursuant to Section 19116 of the Education Code shall be made pursuant to Section 19116 of the Education Code, and this subdivision shall not apply.

- (d) With respect to adjustments in the allocation of property taxes pursuant to this section, a county and any local agency or agencies within the county may develop and adopt a master property tax transfer agreement. The agreement may be revised from time to time by the parties subject to the agreement.
- (e)
- (1) An exchange of property tax revenues that is required by paragraph (8) of subdivision (b) to be determined pursuant to this subdivision shall be determined in accordance with all of the following:
 - (A) The city and the county shall mutually select a third-party consultant to perform a comprehensive, independent fiscal analysis, funded in equal portions by the city and the county, that specifies estimates of all tax revenues that will be derived from the annexed territory and the costs of city and county services with respect to the annexed territory. The analysis shall be completed within a period not to exceed 30 days, and shall be based upon the general plan or adopted plans and policies of the annexing city and the intended uses for the annexed territory. If, upon the completion of the analysis period, no exchange of property tax revenues is agreed upon by the city and the county, subparagraph (B) shall apply.
 - (B) The city and the county shall mutually select a mediator, funded in equal portions by those agencies, to perform mediation for a period not to exceed 30 days. If, upon the completion of the mediation period, no exchange of property tax revenues is agreed upon by the city and the county, subparagraph (C) shall apply.
 - (C) The city and the county shall mutually select an arbitrator, funded in equal portions by those agencies, to conduct an advisory arbitration with the city and the county for a period not to exceed 30 days. At the conclusion of this arbitration period, the city and the county shall each present to the arbitrator its last and best offer with respect to the exchange of property tax revenues. The arbitrator shall select one of the offers and recommend that offer to the governing bodies of the city and the county. If the governing body of the city or the county rejects the recommended offer, it shall do so during a public hearing, and shall, at the conclusion of that hearing, make written findings of fact as to why the recommended offer was not accepted.
 - (2) Proceedings under this subdivision shall be concluded no more than 150 days after the auditor provides the notification pursuant to paragraph (3) of subdivision (b), unless one of the periods specified in this subdivision is extended by the mutual agreement of the city and the county. Notwithstanding any other provision of law, except for those conditions that are necessary to implement an exchange of property tax revenues determined pursuant to this subdivision, the local agency formation commission shall not impose any fiscal conditions upon a city's qualified annexation of unincorporated territory that is subject to this subdivision.
- (f) Except as otherwise provided in subdivision (g), for the purpose of determining the amount of property tax to be allocated in the 1979-80 fiscal year and each fiscal year thereafter for those local agencies that were affected by a jurisdictional change which was filed with the State Board of Equalization after January 1, 1978, but on or before January 1, 1979. The local agencies shall determine by resolution the amount of property tax revenues to be exchanged between and among the affected agencies and notify the auditor of the determination.
- (g) For the purpose of determining the amount of property tax to be allocated in the 1979-80 fiscal year and each fiscal year thereafter, for a city incorporation that was filed pursuant to Sections 54900 to 54904, inclusive, of the Government Code after January 1, 1978, but on or before January 1, 1979, the amount of property tax revenue considered to have been received by the jurisdiction for the 1978-79 fiscal year shall be equal to two-thirds of the amount of property tax revenue projected in the final local agency formation commission staff report pertaining to the incorporation multiplied by the proportion that the total amount of property tax revenue received by all jurisdictions within the county for the 1978-79 fiscal year bears to the total amount of property tax revenue received by all jurisdictions within the county for the 1977-78 fiscal year. Except, however, in the event that the final commission report did not specify the amount of property tax revenue projected for that incorporation, the commission shall by October 10 determine pursuant to Section 54790.3 of the Government Code the amount of property tax to be transferred to the city.

The provisions of this subdivision shall also apply to the allocation of property taxes for the 1980-81 fiscal year and each fiscal year thereafter for incorporations approved by the voters in June 1979.

- (h) For the purpose of the computations made pursuant to this section, in the case of a district formation that was filed pursuant to Sections 54900 to 54904, inclusive, of the Government Code after January 1, 1978, but before January 1, 1979, the amount of property tax to be allocated to the district for the 1979-80 fiscal year and each fiscal year thereafter shall be determined pursuant to Section 54790.3 of the Government Code.
- (i) For the purposes of the computations required by this chapter, in the case of a jurisdictional change, other than a change requiring an adjustment by the auditor pursuant to subdivision (a), the auditor shall adjust the allocation of property tax revenue determined pursuant to Section 96 or 96.1 or its predecessor section, or the annual tax increment determined pursuant to Section 96.5 or its predecessor section, for each local school district, community college district, or county superintendent of schools whose service area or service responsibility would be altered by the jurisdictional change, as determined as follows:
- (1) The governing body of each district, county superintendent of schools, or county whose service areas or service responsibilities would be altered by the change shall determine the amount of property tax revenues to be exchanged between and among the affected jurisdictions. This determination shall be adopted by each affected jurisdiction by resolution. For the purpose of negotiation, the county auditor shall furnish the parties and the county board of education with an estimate of the property tax revenue subject to negotiation.
 - (2) In the event that the affected jurisdictions are unable to agree, within 60 days after the effective date of the jurisdictional change, and if all the jurisdictions are wholly within one county, the county board of education shall, by resolution, determine the amount of property tax revenue to be exchanged. If the jurisdictions are in more than one county, the State Board of Education shall, by resolution, within 60 days after the effective date of the jurisdictional change, determine the amount of property tax to be exchanged.
 - (3) Upon adoption of any resolution pursuant to this subdivision, the adopting jurisdictions or State Board of Education shall notify the county auditor who shall make the appropriate adjustments as provided in subdivision (a).
- (j) For purposes of subdivision (i), the annexation by a community college district of territory within a county not previously served by a community college district is an alteration of service area. The community college district and the county shall negotiate the amount, if any, of property tax revenues to be exchanged. In these negotiations, there shall be taken into consideration the amount of revenue received from the timber yield tax and forest reserve receipts by the community college district in the area not previously served. In no event shall the property tax revenue to be exchanged exceed the amount of property tax revenue collected prior to the annexation for the purposes of paying tuition expenses of residents enrolled in the community college district, adjusted each year by the percentage change in population and the percentage change in the cost of living, or per capita personal income, whichever is lower, less the amount of revenue received by the community college district in the annexed area from the timber yield tax and forest reserve receipts.
- (k) At any time after a jurisdictional change is effective, any of the local agencies party to the agreement to exchange property tax revenue may renegotiate the agreement with respect to the current fiscal year or subsequent fiscal years, subject to approval by all local agencies affected by the renegotiation.

History

Added Stats 1994 ch 1167 § 3 (AB 3347). Amended Stats 1996 ch 522 § 5 (SB 1998), operative July 1, 1997; Stats 1997 ch 692 § 2 (SB 466); Stats 1999 ch 550 § 29 (SB 275), effective September 28, 1999, operative January 1, 2000; Stats 2000 ch 761 § 285 (AB 2838); Stats 2004 ch 355 § 11 (AB 3077); Stats 2005 ch 189 § 1 (AB 818), effective January 1, 2006; Stats 2009 ch 332 § 79.5 (SB 113), effective January 1, 2010; Stats 2010 ch 47 § 11 (AB 2795), effective January 1, 2011; Stats 2012 ch 62 § 21 (AB 2698), effective January 1, 2013; Stats 2015 ch 304 § 22 (AB 851), effective January 1, 2016.

• Amended Stats 2000 ch 761 § 285 (AB 2838); Stats 2004 ch 355 § 11 (AB 3077); Stats 2005 ch 189 § 1 (AB 818), effective January 1, 2006; Stats 2009 ch 332 § 79.5 (SB 113), effective January 1, 2010; Stats 2010 ch 47 § 11 (AB 2795), effective January 1, 2011; Stats 2012 ch 62 § 21 (AB 2698), effective January 1, 2013; Stats 2015 ch 304 § 22 (AB 851), effective January 1, 2016.

§ 99.01. Change resulting in new services

(a) For the purposes of Section 99, in the case of a jurisdictional change that will result in a special district providing one or more services to an area where those services have not been previously provided by any local agency, the following shall apply:

- (1) The special district referred to in this subdivision and each local agency that receives an apportionment of property tax revenue from the area shall be considered local agencies whose service area or service responsibility will be altered by the jurisdictional change.
- (2) The exchange of property tax among those local agencies shall be limited to property tax revenue from the annual tax increment generated in the area subject to the jurisdictional change and attributable to those local agencies.
- (3) Notwithstanding the provisions of paragraph (5) of subdivision (b) of Section 99, any special district affected by the jurisdictional change may negotiate on its own behalf, if it so chooses.
- (4) If a special district involved in the negotiation (other than the district which will provide one or more services to the area where those services have not been previously provided) fails to adopt a resolution providing for the exchange of property tax revenue, the board of supervisors of the county in the area subject to the jurisdictional change is located shall determine the exchange of property tax revenue for that special district.

(b) The provisions of subdivisions (a), (b), (c), (d), and (j) of Section 99 not in conflict with this section shall apply. The jurisdictional changes described in subdivisions (e), (f), (g), (h), and (i) of Section 99 shall not be affected by the provisions of this section.

History

Added Stats 1994 ch 1167 § 3 (AB 3347).

Cal Rev & Tax Code § 99.01

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End of Document

Transfer of Property Tax Revenue Not Related to Jurisdictional Change -- Statutes

Revenue & Taxation Code § 99.02. Transfer of property tax revenue; Adjustments; Public hearing

(a) For the purposes of the computations required by this chapter for the 1985-86 fiscal year and fiscal years thereafter, in the case of any transfer of property tax revenues between local agencies that is adopted and approved in conformity with subdivisions (b) and (c), the auditor shall adjust the allocation of property tax revenue determined pursuant to Section 96.1 or its predecessor section, or the annual tax increment determined pursuant to Section 96.5 or its predecessor section, for those local agencies whose allocation would be altered by the transfer.

(b) Commencing with the 1985-86 fiscal year, any local agency may, by the adoption of a resolution of its governing body or governing board, determine to transfer any portion of its property tax revenues that is allocable to one or more tax rate areas within the local agency to one or more other local agencies having the same tax rate area or tax rate areas. Upon the local agency's adoption of the resolution, the local agency shall notify the board of supervisors of the county or the city council of the city within which the transfer of property tax revenues is proposed.

(c) If the board of supervisors or the city council concurs with the proposed transfer of property tax revenue, the board or council shall, by resolution, notify the county auditor of the approved transfer.

(d) Upon receipt of notification from the board of supervisors or the city council, the county auditor shall make the necessary adjustments specified in subdivision (a).

(e) Prior to the adoption or approval by any local agency of a transfer of property tax revenues pursuant to this section, each local agency that will be affected by the proposed transfer shall hold a public hearing to consider the effect of the proposed transfer on fees, charges, assessments, taxes, or other revenues. Notice of the hearing shall be published pursuant to Section 6061 of the Government Code in one or more newspapers of general circulation within each affected local agency.

(f) No local agency shall transfer property tax revenue pursuant to this section unless each of the following conditions exists:

(1) The transferring agency determines that revenues are available for this purpose.

(2) The transfer will not result in any increase in the ratio between the amount of revenues of the transferring agency that are generated by regulatory licenses, use charges, user fees, or assessments and the amount of revenues of the transferring agency used to finance services provided by the transferring agency.

(3) The transfer will not impair the ability of the transferring agency to provide existing services.

(4) The transfer will not result in a reduction of property tax revenues to school entities.

History:

Added Stats 1994 ch 1167 § 3 (AB 3347). Amended Stats 2010 ch 699 § 37.5 (SB 894), effective January 1, 2011.

Cal Rev & Tax Code § 99.02

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Guidelines for Tax Exchange Negotiations for Annexations
(Approved December 18, 2007)

1. It is not the policy of Plumas County to share any portion of the County tax base, and this policy applies only to the sharing of tax increment. Exchanges will be based on public policy reasons.
2. The district will be expected to provide financial justification for the request of tax exchange. This justification must include both how the sharing would benefit the district and how the exchange benefits the County.
3. The District must approve a special tax, assessment, or other funding mechanism prior to the County agreement to a tax exchange.
4. The District must present its plan for uses for the revenues generated by the exchange.
5. The County shall make the following two findings:
 - (a) The County shall determine that revenues are available for the transfer.
 - (b) The transfer will not impair the ability of the County to provide existing services.
6. Any emergency response district shall implement a cost reimbursement system.
7. Districts must notify the County of their desire to negotiate.
8. The County may choose not to negotiate with any district that is not part of the Special District Association. The Special District Association may provide negotiators.