



ORANGE COUNTY  
**LAFCO**



2025 - 2028

# STRATEGIC PLAN

April 4, 2025



IN CONSULTATION WITH  
KELLY ASSOCIATES MANAGEMENT GROUP LLC



## April 4, 2025

### **The Commission**

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Wendy Bucknum, Vice Chair

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Aimee Diaz, Policy Analyst

Cheryl Carter-Benjamin, Commission Clerk

Scott Smith, General Counsel

### **Consulting Staff**

Kelly Associates Management Group LLC

William R. Kelly, President/CEO

# Introduction

On April 4, 2025, the Orange County Local Agency Formation Commission (OC LAFCO) held its 26th Strategic Planning Workshop. The workshop served as an opportunity for the Commission to review and reflect on the agency's three-year Work Plan 2022-2025. The Commission retained William (Bill) Kelly, President and CEO of Kelly Associates Management Group LLC (KAMG), to facilitate the process of developing a new three-year plan.

## Strategic Planning Workshop

During the workshop, the Commission reviewed and discussed the objectives and goals included in the 2022-2025 Work Plan. Based on the discussion, the Commission identified and approved the agency's goals and objectives for the new three-year Work Plan 2025-2028. The Commission identified the following goals:

- 1: Staff Development, Retention and Recruitment
- 2: Improve Municipal Service Review (MSR) Process for Future MSRs
- 3: Optimize Communication
- 4: Southern Region LAFCOs Educational and Legislative Partnership

## 2025-2028 Work Plan

The 2025-2028 Work Plan on the following pages depicts the agency's goals, objectives, and schedules over the next three years. As a note, the Commission may amend the multi-year plan if warranted.

## GOAL 1:

### Staff Development, Retention and Recruitment

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
1.1	EO	Conduct Classification, Compensation and Benefits Assessment.	Consultant	2024-2025	<b>Underway</b> To be considered by the Commission on June 11, 2025.
1.2	EO/AEO/CC	Complete staff assessment and conduct recruitment for vacancy(ies).	Consultant	2025-2026	<b>Ongoing</b>
1.3	EO/Consultant	Prepare a Succession Plan by identifying and developing a strategic process for successors for key positions at OC LAFCO.	Staff/ Consultant	2025-2026	<b>Underway</b> To be considered by the Commission on June 11, 2025

## GOAL 2:

### Improve Municipal Service Review (MSR) Process For Future MSRs

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
2.1	EO/AEO/ Analyst	Develop criteria for conducting the following MSR and SOI review processes for future reviews:  <ol style="list-style-type: none"> <li>1. Comprehensive</li> <li>2. Reconfirm</li> <li>3. Update</li> </ol>	Consultant	2026-2028	Development of criteria will occur upon completion of fourth cycle MSRs. Estimated time of completion of all MSRs is FY 26-27.
2.2	AEO/Analyst	Develop and distribute the following MSR questionnaires:  <ol style="list-style-type: none"> <li>1. Pre-MSR/SOI – to assess which process will be conducted.</li> </ol>		2026-2028	Development of pre-MSR questionnaire will occur upon completion of fourth cycle MSRs. Estimated time of completion of all MSRs is FY 26-27.
2.3	AEO/Analyst	Continued use of web-based programs (fiscal indicators, shared services, and MS dashboard) to maintain agency data for MSR determinations.		2025-2028	Ongoing
2.4	AEO/Analyst/CC	Present year-end report to the Commission that provides analytics on MSR agency feedback and the use of the agency's web-based programs.		2025-2028	As needed and/or biannually

## GOAL 3:

### Optimize Communication

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
3.1	All	Use agency communications tools (bi-annual news, website, video FAQs, fiscal indicators and shared services programs) to engage agencies and public to inform of OC LAFCO activities.		2025-2028	Ongoing
3.2	Analyst/CC	Conduct visits and disseminate media kits to OC legislators and stakeholders.		2025-2028	Ongoing
3.3	EO/Analyst	Distribute bi-annual news to inform of OC LAFCO activities.		2025-2028	Ongoing

## GOAL 4:

### Southern Region LAFCOs Educational and Legislative Partnership

Obj. No.	Staff Assigned	Objective Description	Resources	Schedule	Status
4.1	EO	Establish a memorandum of understanding with southern region LAFCOs to develop a collaborative structure on issues that all/each LAFCO(s) encounter.	To be determined	To be determined	To be determined
4.2	All	Target areas of collaboration with legislative, educational, and professional associations and groups.	To be determined	To be determined	To be determined
4.3	Analyst	Develop mechanisms to monitor key legislation of LAFCO interest through the partnership with the southern region LAFCOS.	To be determined	To be determined	To be determined
4.4	EO/Analyst	Conduct visits and disseminate information to OC legislators and stakeholders (CSDA, CSAC, League of CA Cities, OC League of CA Cities) to establish legislative partnerships.	To be determined	To be determined	To be determined
4.5	Analyst/CC	Distribute bi-annual news to agencies and stakeholders to inform them of OC LAFCO activities and efforts by the southern region LAFCOs.	To be determined	To be determined	To be determined