



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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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 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, Commissioners reviewed and discussed the 2022 – 2025 Work Plan and identified the agency’s new goals and objectives for the 2025 – 2028 Work Plan. Based on the feedback from Commissioners and staff, the following four goals were identified:

- 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 fiscal 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/Consultant	Conduct Classification, Compensation and Benefits Assessment.	Consultant	2024-2025	Classification, compensation, and benefits assessment complete.
1.2	EO/AEO/CC	Complete staff assessment and conduct recruitment for vacancy(ies).	Consultant	2025-2026	Staff assessment complete. Recruitment of analyst complete.
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	Ongoing

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"> 1. Comprehensive 2. Reconfirm 3. Update 	Consultant	2026-2028	Not yet started.
2.2	AEO/Analyst	Develop and distribute the following MSR questionnaires: <ol style="list-style-type: none"> 1. Pre-MSR/SOI – to assess which process will be conducted. 	Staff	2026-2028	Not yet started.
2.3	AEO/Analyst	Continued use of web-based programs (fiscal indicators, shared services, and MS dashboard) to maintain agency data for MSR determinations.	Staff	2025-2028	Ongoing <ul style="list-style-type: none"> • Fiscal Indicators updated with data from FY 22-23. • Staff is updating the MS Dashboard data and its features to improve the program.
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.	Staff	2025-2028	As needed and/or biannually <ul style="list-style-type: none"> • Report presented to the Commission with feedback from: Central MSR Region (Cities of Anaheim, Irvine, Orange, Santa Ana, Tustin, and Villa Park and East Orange County Water District, Serrano Water District, and Silverado Modjeska Recreation and Parks District), Orange County Mosquito and Vector Control District, and Orange County Water District.

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.	Staff	2025-2028	Complete Ongoing
3.2	Analyst/CC	Conduct visits and disseminate media kits to OC legislators and stakeholders.	Staff	2025-2028	Ongoing
3.3	EO/Analyst	Distribute bi-annual news to inform of OC LAFCO activities.	Staff	2025-2028	Ongoing The Pulse was distributed twice this year.

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.	Commission approved an MOU with Los Angeles, San Bernardino, and San Diego, allocating \$10,000 to support the collaborative effort.	Started July 1, 2025.	Ongoing
4.2	All	Target areas of collaboration with legislative, educational, and professional associations and groups.	Staff/Alliance of LAFCOs	July 1, 2025	Ongoing
4.3	Analyst	Develop mechanisms to monitor key legislation of LAFCO interest through the partnership with the southern region LAFCOs.	Pending to complete an agreement in collaboration with the Alliance of LAFCOs and lobbyist firm for legislative services.	January 2026	Ongoing
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.	Staff	Annual process of disseminating OC LAFCO report information to stakeholders.	Ongoing
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.	Staff	Annually.	Ongoing The Pulse was distributed twice this year.