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	Complete
1.2	EO/AEO/CC	Complete staff assessment and conduct recruitment for vacancy(ies).	Consultant	2025-2026	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: 1. Comprehensive 2. Reconfirm 3. Update	Consultant	2026-2028	Not yet started.
2.2	AEO/Analyst	Develop and distribute the following MSR questionnaires: 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** • Fiscal Indicators updated with data from FY 2024-2025. • Staff is updating the data included as part of the dashboard. Expected to be completed by Fall 2026.
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** • Following the completion of the North Region MSR, staff will be distributing the post MSR survey and provide an update to the Commission during the September meeting.

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** Completed visits to 13 special districts and 12 cities during FY 2025-2026.
3.3	EO/Analyst	Distribute bi-annual news to inform of OC LAFCO activities.	Staff	2025-2028	**Ongoing** The spring and summer editions of the Pulse were distributed during FY 2025-2026.

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.	Staff	Started July 1, 2025	**Complete** Commission approved the first amendment to the MOU with Los Angeles, San Bernardino, and San Diego, allocating $15,000 to support the collaborative effort.
4.2	All	Target areas of collaboration with legislative, educational, and professional associations and groups.	Staff/Alliance of LAFCOs	FY 2025-2028	Staff attends the Alliance monthly meetings. OC LAFCO hosted the first Alliance Workshop
4.3	Analyst	Develop mechanisms to monitor key legislation of LAFCO interest through the partnership with the southern region LAFCOS.	Executive Officer and Policy Analyst	FY 2025-2028	**Complete** **Ongoing** The Alliance members executed a contract with the lobbyist firm Politico Group. Staff attends the monthly meeting of the Alliance Legilsative Committee.
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	Executive Officer and Policy Analyst	**Complete** **Ongoing** The Executive Officer and staff met with 13 special districts and 12 cities to provide information on the OC LAFCO MSR process, fiscal indicators, current projects, and discuss topics of interest to each agency. Staff has attended meetings held by stakeholders (OCCOG, CSDA, and OCCMA) to track legislation that may be of interest to OC LAFCO.
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 spring and summer edition of the Pulse were distributed during FY 2025-2026.