



Strategic Planning

2018 CALAFCO Staff Workshop

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Napa LAFCO Strategic Planning Sessions

- ❖ November 2011 (facilitated by Bill Chiat)
- ❖ January 2015 (facilitated by Dana Smith)
- ❖ February 2016 (facilitated by Liz Yager)
- ❖ March 2017 (facilitated by Bill Chiat)

Why Did Napa LAFCO Do Strategic Planning?

- ❖ Push from Public Member with a strong business background
 - Mission, vision, & S.M.A.R.T. goals
 - “Big picture” strategic thinking
 - Government’s enemy is complacency
- ❖ Other Commissioners not as motivated, but were easily convinced to go along with it

Facilitators

- ❖ **Bill Chiat (2011 and 2017)**
 - Insider: former CALAFCO Executive Director, former County of Napa Executive Officer
- ❖ **Dana Smith (2015)**
 - Insider: former OC LAFCO Executive Officer, former City of Napa Assistant City Manager
- ❖ **Liz Yager (2016)**
 - Outsider: County of Sonoma Energy and Sustainability Division

Outcomes

- ❖ **Strategic Plans adopted in 2012 & 2018**
 - Both followed Chiat sessions
 - Schedules for MSRs, SOIs, special projects
- ❖ **Greater independence**
 - Change from County Counsel to private firm following Smith session
- ❖ **Commission consensus on local issues**
 - Threats to ag preservation
 - Island annexations
 - Outside agency water/sewer service agreements
 - Encourage shared services & resources
 - In-depth, active communication with local agencies

2012 Strategic Plan Goals

❖ Accomplished

- Scoping workshop for Central County MSR
- Report on mutual water companies (AB 54)
- Greater social media presence

❖ Not accomplished

- Electronic tablets for Commissioners
- Option for applicants to log onto LAFCO website with personal passwords & submit proposal forms online
- Report on school districts
- Annual reports on regional government agencies (ABAG & MTC)
- Annual newsletter (partially accomplished)
- Follow adopted MSR/SOI schedule

2018 Strategic Plan

❖ Focus of LAFCO (guiding principles)

- MSR based on needs of agencies and LAFCO
- Policies – comprehensive, effective, & transparent
- Forecast issues – services, boundaries, & legislation
- Active role in local agency sustainability
- Engagement with General Plan Updates
- Active with housing & transportation issues

❖ Study Schedule (3rd round)

- MSR, SOI, & island annexation program

❖ Policy Review Schedule

- Policy Committee comprehensive update

Facilitator Factor

- ❖ Facilitator can make or break the session
 - Intricate understanding of LAFCO is critical
- ❖ Engage Commissioners beforehand
 - Individual phone interviews
- ❖ Interactive consensus building
 - Ask Commissioners to identify top priorities
- ❖ Consider local politics
 - Some great ideas are non-starters
- ❖ Make it fun!

Questions?

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