1. What are the organization’s greatest strengths?
2. What are the organization’s most significant weaknesses?
3. What changes are occurring in the external environment (outside CALAFCO) which may have a positive impact or present an opportunity for your organization over the next 2 to 5 years?
4. What changes are occurring in the external environment (outside CALAFCO) which may have a negative impact or serve as a threat to your organization over the next 2 to 5 years?
5. What services/benefits are you currently providing to your members?
6. How are your members’ needs likely to change over the next 2 to 5 years?
7. How will local agency budget constraints affect CALAFCO Membership?
8. Does CALAFCO’s role need to be clarified and if so, how? (“As a non-profit, educational trust, limited to spending no more than 20% of time on lobbying activities”; “answering questions/educating vs. advocating/lobbying”, etc.)?
9. How can CALAFCO support county LAFCO’s in being more “proactive” rather than “reactive”?
10. What services need to be enhanced or added to continue to meet the needs of the members and provide exceptional value?
11. What operational issues need to be addressed to ensure continued, effective service delivery?
12. What is your reason for being/purpose (i.e. “mission”)?
13. What are the guiding principles or values that govern how you operate?
14. What are the 3 to 4 Bold Steps that your organization needs to take to prepare for the future?
15. Action Plans for each Bold Step.
We are an organization dedicated to providing member LAFCOs with technical resources including coordinating LAFCO activities statewide, serving as a resource to the Legislature and other bodies, and offering a structure for sharing information among LAFCOs and other governmental agencies.

**STRENGTHS**
- Almost 100% membership; diverse membership with urban, rural, suburban, city, county, special districts
- Membership benefits:
  - Annual Conference.
  - Staff and clerk training/workshops to build foundation of expertise/knowledge.
  - Informational clearinghouse for LAFCOs “Best Practices”.
  - United solutions to legislature on statewide LAFCO issues; credibility in legislature.
  - Informational workshops to public (Brown Act, Mission).

**OPPORTUNITIES**
- New legislation gives us more authority to deal with growth related issues (clarify our role).
- Increased public participation (define our role in affecting peoples’ lives).
- More accountability by spreading costs among members (more likely to be independent).
- Solutions to managing growth.
- More recognition from peer associations.

**MISSION**

1. Continue to deliver and enhance member services in CALAFCO.
2. Foster a “proactive” approach to identify and respond to emerging issues affecting LAFCOs statewide.
3. Provide advocacy and legislative support to address issues impacting LAFCOs statewide.

**WEAKNESSES**
- Structure: Budget/money, no goals with resources; voluntarism vs. professionalism (membership, board, size of staff).
- Communication with Board: Knowing the Board members; logistical contact (quorums/phone mtgs.).
- Membership: Understanding what CALAFCO is; need for more information, education, communication; full membership not involved.
- Diversity of counties, their focuses & needs (no one size fits all; ag., urban, growth/no growth); overgeneralization to satisfy needs; taking power away from local agencies.

**CALAFCO:**
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- Communication with Board: Knowing the Board members; logistical contact (quorums/phone mtgs.).
- Membership: Understanding what CALAFCO is; need for more information, education, communication; full membership not involved.
- Diversity of counties, their focuses & needs (no one size fits all; ag., urban, growth/no growth); overgeneralization to satisfy needs; taking power away from local agencies.

**LAFCO’s:**
- Inactive/underfunded LAFCO’s.
- Non-recognition of changes in role in local govt.; not understanding mandates.
- Underdeveloped staff professionals; rotation creates experience and knowledge gaps; too much reliance on local staff (own agendas); too constituent based (not LAFCO hat on); power grab perception of local agencies toward LAFCO.
- Balkanized counties with hardened attitudes.

**THREATS**
- Economy/budget (state/local dues impact); potential loss of membership due to budget constraints.
- Changes in mandates/unfunded mandates (i.e., Williamson Act, Housing Elements)
- Customized statewide legislation impacting local LAFCOs; non-universal legislation.
- Population growth without limits accelerating (housing advocacy vs. ag. preservation may change LAFCO legislation; legislators voting based on urban pressure; water control boards: wastewater permits; environmental mandates at fed., state, county level).
- Powershift to Sacramento or regional groupings (sales taxes, shifts to population centers)?
- Locked in LAFCOs confronting county or city planning.

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## Member Services

### Current Services
- Networking: regional groups forming
- Education:
  - Newsletters
  - Annual conferences
  - Staff training/in-service
  - Website: information
  - Library of resources from counties
  - Notification of hot issues
  - Mini conferences and workshops
- Lobbying:
  - Legislative responses (20%)

### Enhanced Services
- Conferences:
  - Enhance feedback questionnaires (opinions, timing, venues, costs); Board review of feedback; report answers to members and provide response via newsletter, website (FAQs).
  - Survey individual commissioners annually on what CALAFCO should be doing.
- Communications:
  - Enhance submission of articles from LAFCO’s regularly requested.
  - Hot topic responses.
  - Speakers’ Bureau.
  - Form letter with response page and return envelope.
  - Commissioner web tree started.
- Legislation:
  - Volunteers/commissioners to appear with CALAFCO staff (on other than legislation days) at legislative committees and subcommittees; staff identify committee members/point person at each LAFCO to be more proactive around policy issues.
  - Volunteer grass roots efforts and commitments.
- Education:
  - White papers on file for distribution/email.
  - Sample policies for assistance.
- Board:
  - Resource for other members and access to local legislators.

### Members’ Changing Needs
- Some LAFCOs are growing up.
- Public education in LAFCOs’ roles.
- Interpretation and implementation of new legislation.
- Sharing information on dealing with common issues.
- Budgetary constraints may limit participation or may generate more needs.
- Increased demand for services.

### How will local agency budget constraints impact CALAFCO?
- Perceive CALAFCO as “discretionary” expense and cut it!
- Small special districts/cities pressure to cut 1/3 obligation to LAFCO and trim budget to LAFCO.
- Findings required to cut LAFCO budget from prior year per AB2838.
- May move LAFCOs to seek legislative relief; shift balance (knee jerk or otherwise).
**CALAFCO’s Role**

<table>
<thead>
<tr>
<th>Role Clarification</th>
<th>Proactive vs. Reactive</th>
</tr>
</thead>
</table>
| • As a Professional Association (statewide player/stakeholder):  
  – Networking opportunities.  
  – Education & information (80%).  
  – Advocacy (utilize value added experiences of “best practices” as 5-year windows approach).  
  – Statewide arbitration/mediation of local issues; resolve conflicts, intrusions, circumvention of LAFCO authority.  
  – Effective think tank of local governments for envisioning the future.  
  – Reinforce statutory authority (stop urban sprawl, preserve agriculture land, promote orderly government boundaries).  
  • Legislation:  
    – Consistent, reliable resource for legislators (balanced perspective/positions on local issues).  
    – Advocacy, monitor, watchdog, scout.  
    – Lobbying (20%; proactive vs. reactive; platforms & policies; clearly define).  
    – Reinforce statutory authority (stop urban sprawl, preserve agriculture land, promote orderly government boundaries).  
    – Full participant with other organizational groups. | • Encourage LAFCO’s to identify key issues/projects.  
• Resource for best practices (information, sample policies).  
• Awards program to recognize innovative approaches, good work on initiatives/stated mandates/tools, key projects/accomplishments; part of annual program.  
• Provide ideas to enhance local area programs (identify issues statewide that could impact local areas).  
• Policy/positions development.  
• Formulating consolidations (unfunded mandate for LAFCO’s; no budgets for proactive studies/follow up studies to see where governance needs to change). |
Operational Issues to Address to Ensure Effective Service Delivery

<table>
<thead>
<tr>
<th>Commissioners</th>
<th>Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Continue to contract/volunteer professional staff and services.</td>
<td>• Quick strike capabilities.</td>
</tr>
<tr>
<td>• Further utilize electronic communication for “cost effective” delivery services (i.e., email voting procedures, conference calls, newsletters, and directories).</td>
<td>• Ways to measure success or failure.</td>
</tr>
<tr>
<td>• Well established goals and objectives for staff to enable effective/timely actions and representation.</td>
<td>• Staff (paid and volunteer) resources.</td>
</tr>
<tr>
<td>• Build on/enhance operational efficiencies with other associations (i.e., cost savings, conference calls, video conferencing CSAC, etc.).</td>
<td>• Timelines (established deadlines).</td>
</tr>
<tr>
<td>• Aggressively seek interaction with state associations to explore economies of scale (CSAC, CCS, AWA, etc.).</td>
<td>• Volunteer product vs. quality of product.</td>
</tr>
<tr>
<td></td>
<td>• Big ideas without big resources.</td>
</tr>
<tr>
<td></td>
<td>• Turnover.</td>
</tr>
</tbody>
</table>
**Bold Step #1:** Continue to deliver and enhance member services in CALAFCO (networking opportunities, education, information, communication, workshops, conferences).

**Action Steps:**

- **Networking:** Provide effective networking opportunities.
  - **Communications:**
    - Continue member newsletter (consider methods to generate articles).
    - List member services on web.
    - Provide “Hot Topic” responses.
    - Establish and implement a Speakers’ Bureau.
    - Develop form letter with response page and return envelope.
    - Enhance email network (commissioner web tree; legislative alerts, best practices, regional communications, send to all local members/alternates).
  - **Annual Conference:**
    - Enhance feedback questionnaires (opinions, timing, venues, costs); Board review of feedback; report answers to members and provide response via newsletter, website (FAQs).
    - Survey individual commissioners annually on what CALAFCO should be doing; mid-year timely topics for conference.
  - **Education:**
    - Develop and maintain white papers on file for distribution/email.
    - Develop and maintain sample policies to assist local LAFCOs.
  - **Budget:** Work within budget.

**Responsible Party**

<table>
<thead>
<tr>
<th>Responsible Party</th>
<th>Time Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>CALAFCO Staff</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Local EO/Staff</td>
<td></td>
</tr>
<tr>
<td>Our staff &amp; local LAFCOs</td>
<td>3x/year</td>
</tr>
<tr>
<td>Staff/EO</td>
<td>Now</td>
</tr>
<tr>
<td>CALAFCO Board</td>
<td>Ongoing</td>
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<tr>
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<tr>
<td>Staff/EO</td>
<td>July 2004</td>
</tr>
<tr>
<td>All</td>
<td>Ongoing</td>
</tr>
<tr>
<td>EO/Staff</td>
<td></td>
</tr>
</tbody>
</table>
Bold Step #2: Foster a “proactive” approach to identify and respond to emerging issues affecting LAFCO’s statewide (arbitration/mediation of local issues; resolve conflicts in LAFCO authority; serve as think tank for future visioning; and reinforce statutory authority to stop urban sprawl, preserve agriculture land, and promote orderly government boundaries).

**Action Steps:**
- Identify LAFCOs that have provided leadership for 2004 conference.
- Provide information on website on “best practices”.
- Develop policy resource library.
- Develop a survey to identify issues for rural, suburban, and urban LAFCOs. Present implementation proposal to Board.

**Responsible Party**  
Staff/Executive Board  
Staff  
Staff  
Staff

**Timeline**  
Jan. 2004  
Jan. 2004  
Jan. 2004  
Jan. 2004
Bold Step #3: Provide advocacy and legislative support to address issues impacting LAFCOs statewide (resource for legislators; balanced positions; advocacy; lobbying; and statutory authority to stop urban sprawl, preserve agriculture land, and promote orderly government boundaries).

Action Steps:

- Provide reports as watchdog; support or oppose legislation; and email activity reports.
- Develop grass roots tree of all commissioners:
  - Contact all 58 EOs for commission email addresses or FAX.
  - Cultivate volunteer base.
- Develop Speakers' Bureau.
- Develop website for trees.
- Design and implement a feedback methodology
  - How to get input from all commissaries on all issues.
  - How to get issues to all commissioners.

<table>
<thead>
<tr>
<th>Responsible Party</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exec. Dir./Staff</td>
<td>Current</td>
</tr>
<tr>
<td>Leg. Comm. Staff</td>
<td>Feb. 2004</td>
</tr>
<tr>
<td>Chair/Exec. Dir.</td>
<td>Feb. 2004</td>
</tr>
<tr>
<td>Dan</td>
<td>Feb. 2004</td>
</tr>
<tr>
<td>Staff/Exec. Comm.</td>
<td>Feb. 2004</td>
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