



SERVE • CONNECT • PROTECT

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Introduction to the Strategic Plan for Fairfield County, 2022-2024

This introductory section of the Strategic Plan includes a summary about strategic planning, the mission of Fairfield County Auditor's Office, and strengths, weaknesses, opportunities, and threats.

What is Strategic Planning?

Strategic planning is an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment. It is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future. A strategic plan is a document used to communicate with the organization about goals and objectives typically for a mid-term period. The strategic plan is a helpful tool for the organization to reach the *vision: secure, attractive residential and commercial neighborhoods where people unite to form a caring, learning, participating, sustainable community where each person is important.*

The strategic plan is a living document and is expected to be updated and reviewed regularly. The normal range for a strategic plan is three to five years, which allows an organization to gaze beyond the annual budget horizon. A strategic plan allows leaders to consider current issues in the context of the relatively near future; to anticipate challenges ahead; and to decide on how to deal with those challenges as they arise. Rather than a process apart from everyday functions of the organization, the mid-range nature of strategic planning allows the organization to bring alignment within a set of mutual goals. A strategic plan is a flexible, living document that should be adapted to the internal and external changes that are inherent in a complex environment.

Mission of the Fairfield County Auditor's Office

The mission of the County Auditor's Office is to perform statutory duties of the County Auditor with excellence, integrity, and innovation while embracing outstanding internal and external customer service to continuously improve county government.

This mission was affirmed during the January 2022 retreat of the Fairfield County Auditor's Office. ***We serve.connect.protect as part of Fairfield County's identity, and our brand is excellence.***

We work to ensure high quality services at exceptional value to taxpayers. We foster economic and financial sustainability, and we enhance the county's reputation as a high-performing, learning, and caring organization. Team mission statements are aligned with the overall mission.

Values

Values highlighted during the retreat were:

- accountability
- adaptability / flexibility / change management
- subject matter expertise
- kindness - courtesy
- empathy
- consistency
- compliance
- attention to detail
- capability
- collaboration
- continuous improvement
- customer-focus
- efficiency
- effectiveness
- ethical actions
- excellence
- expertise
- fairness
- high-performance
- innovation
- servant leadership
- ownership of process or service
- responsiveness
- quality
- service orientation – positive customer experience
- transparency
- respect
- work-life balance
- strategic
- personal service – grass roots orientation
- empowerment

Fairfield County values professionalism (taking pride in our work, communicating effectively, projecting positivity, respecting one another in the workplace, delivering service at the highest standards, and maintaining a strong, skilled organizational knowledge base). Fairfield County also values the delivery of cost-effective services (keeping costs down for taxpayers), as well as honoring tradition and history. Teamwork, collaboration, cooperation, and acknowledging the ideas of others are commonly noted values. Customer service, accountability, and integrity are strong core values, as well.

SWOT Analysis for Insight to a Strategic Plan

Prior to the retreat and during the retreat, employees participated in a SWOT analysis. SWOT stands for:

- **S** - Strengths
- **W** - Weaknesses
- **O** - Opportunities
- **T** - Threats

A SWOT analysis helps to create an ultimate to-do list, and it forces you to think about the future. A SWOT analysis lists good and bad things, both from an internal and external viewpoint.

<i>SWOT Factors</i>	<i>Positive</i>	<i>Negative</i>
Internal	Strengths	Weaknesses
External	Opportunities	Threats

Strengths and weaknesses are internal factors, while opportunities and threats are external factors. Strengths and weaknesses mostly focus on the present, while opportunities and threats mostly focus on the future.

A SWOT analysis was part of interviews of employees and within multiple meetings of 29 employees, the full staff. Employees were requested to think about the Auditor's Office and to think of the entirety of county government. With a SWOT analysis, there are no wrong answers. The expertise and experience of the employees were trusted, and their perspectives were valued. All responded with input.

<i>Summary of SWOT Analysis</i>	
<p>Strengths</p> <ul style="list-style-type: none"> • County partnership • Communication across departmental lines • Strong • Consistency in partnership • Dedicated leadership • Passionate team members • Purpose • Connections with county human infrastructure • Structure allows for ability to tackle problems with multiple partners • Employees who want to make a difference • Outcomes of work are positive, visible, and measurable • Positive relationships with other sectors and multiple entities • Good reputation - with results • Successful audits • GIS technology • Physical space is exceptional • Employees have knowledge of processes and requirements 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Services are not as well known in the community as they could be • Costly to improve technology; technology & processes need improved • Telecommunications are outdated • Payroll system is burdensome • Financial officers are ready for additional training and understanding – some departments need support more than others • No dedicated funding source for training • Position descriptions need to be better aligned with priorities • Formal processes can be improved • Employees feel uncertain about their future, given there are changes

Opportunities	Threats
<ul style="list-style-type: none"> • Potential to engage other entities in strategic reviews • Growing county • Relatively stable economy; stable financial position of the county • Review of processes will allow for improvements • Improvements in communications and training internally and externally • Exploration of new organizational structure • Exploration of an Ohio Chapter of IAAO 	<ul style="list-style-type: none"> • Some uncertainty in the economy, especially mid-long term • Increasing costs and supply chain disruptions • Market volatility in terms of real estate prices make the triennial assessment one that could be one of tension • Cybersecurity threats • Public misinformation and misunderstandings, particularly about BOR or appraisal processes (viewed as an ongoing threat from multiple sources) • Public discontent arising when market activity increases appraised values

Initial Observations (In October, with expectations for refinement at the annual retreat.)

1. Give employees a ***sense of calm and support*** to help them through this time of change.
2. With employees and stakeholders, ***examine processes for improvements using a kaizen-based process*** to remove steps that do not add value and leverage steps that do add value.
 - *Data Board* responsibilities are not aligned well with progressive technology improvements – evaluate other governance models – Does the Data Board need to exist?
 - Explore if *Budget Commission* responsibilities can be met without formal processes of transcribed hearings; there is a codified process for waivers
 - *Records & Retention* responsibilities need maintained
 - *Use of MUNIS related technology* requires training and additional resources– there is a lot of opportunity to improve internal communications if there are additional resources
 - REA/Recorder/Map Room relationships have been altered by *building changes*
 - *Establish an Auditor/Commission Connection Work Group* for ongoing financial planning and human infrastructure support
 - Establish a *payroll and A/P working group*, focus on process
 - *Develop training and outreach by videos* to improve civic and internal knowledge

3. Reward **customer service skills** (return phone calls within one day; return emails within one day, return correspondence within five days) to increase service orientation and support employees' sense of urgency.
4. **Align position descriptions with priorities** to establish expectations. Provide training for leaders and for all employees, **especially leadership training**. Create a more accurate table of organization.
5. Bring in association and other assessments to **strengthen cybersecurity efforts**. Build upon technology work group findings. Develop a recommendation for telecommunications. Determine what is needed to improve network or infrastructure knowledge.
6. **Succession planning is an ongoing process**. Recruitment, retention, and recognition activities are meaningful. **Develop coaching and mentoring opportunities**.
7. **Be available to elected officials** and seek input and feedback about strategic efforts.
8. The **next triennial update is in 2022**; it is based on current real estate market values using a sales analysis. The next sexennial reappraisal is in 2025. It takes about 2 ½ years to complete a reappraisal. Appraisers will perform exterior reviews of properties to accurately assess values. Changes are due to new construction, a change in the physical size or shape or properties, or a demolition or damage to a property.

Triennial Update

The Fairfield County Auditor's Office will perform a **triennial update** in 2022. This update is a review of valid sales that have occurred over the prior three years. The state issues a recommendation based on the relationship between value and sales price. By reviewing sales and market trends, property values are adjusted incrementally creating a more predictable tax base (and a less shocking change at the sexennial update). Adjustments vary between neighborhoods based on market conditions.

Sexennial Update

The Fairfield County Auditor's Office will perform a county wide reappraisal in 2025. This is known as a **sexennial update**. This reappraisal involves physically viewing all properties and updating the value attributes, such as size, condition, construction quality, desirability, and overall utility. Along with physically reviewing properties, appraisers will conduct a thorough review of the prior three years of sales including neighborhood analyses. Market trends provide the framework for updated appraisals. Adjustments vary between neighborhoods based on market conditions.

9. The BOR process has improved, and there are opportunities to improve communication and understanding of the *appraisal and review process*.

For external communications:

- Create fact sheets for countertops, mailings, newsletters, media releases
- Create video presentations for how the process works
- Add more information to the “postcards” about reappraisals
- ***Use social media***
- Conduct presentations for the Bar, Realtors, and Elected Officials
- Continue informal reviews
- Engage professional services for search engine optimization and social media marketing
- Create a video about how the values effect taxes that are assessed

For internal communications:

- Focus on ***payroll coordination*** and improvements unique for each department
- Increase ***integration with departments***

Relating to the themes, and at the retreat, the questions asked were:

1. Do the themes make sense?
2. Is there a theme missing in this initial analysis?
3. Do the action steps relate to the themes?
4. What action steps should be added?

It is expected that there will be ongoing updates to the action steps, with leaders and small groups developing goals.

Strategic Themes

1. **Provide Supervisory Support & Coaching Opportunities for Team Members**
2. **Update Financial and REA Processes to Add Value**
3. **Focus on Strengths & Customer Service**
4. **Improve Communication and Outreach**
5. **Improve Use of Technology and Records Management Processes**

Updates to the Strategic Plan

The Auditor's Office is dedicated to obtaining additional input and feedback. The strategic plan and its themes were initially discussed in public meeting in January 2022. They were also discussed during the Auditor's retreat and in multiple departmental meetings. The strategic plan is a working document that is updated regularly and posted on the County Auditor's website.

STRATEGIC THEME Provide Supervisory Support & Coaching Opportunities for Team			
CHAMPION: Carri Brown			
WORK GROUP MEMBERS: Supervisors and Managers			
TARGETED OUTCOMES: Productivity, Team Cohesiveness, Mission Clarity, Employee Retention, Improved Support Systems			
Action Step(s)	Task Review/Dates	Assigned to	Results
<p>Update the position descriptions and table of organization, ensuring proper alignment with goals, systems, and use of funds.</p> <p>Interim and annual evaluation process will be in place for 2022 going forward.</p>	<p>December 2021, January 2022- annual review of the table of organization</p> <p>Interim and annual evaluations have been scheduled for all staff.</p> <p>Evaluation training was conducted for all employees. All employees have set SMART goals for the year as of April 2022.</p>	Carri Brown	<p>By December 21, the table of organization was updated and aligned with goals, and the proper use of funds was reviewed. Goals have been tied to the mission.</p> <p>Employees received copies of position descriptions and verified their accuracy. This will also be done with interim and annual evaluations.</p> <p>Employees commented that it was important to know the reporting chain, and they appreciated the new table of organization for its clarity. Updates for new hires will continue to be made. The table of organization has been updated as needed. It has been shared with all of the team members.</p> <p>Evaluations are in progress.</p>
Provide NACo High-Performance Leadership training opportunities for all employees.	By the end of 2022, all employees will have taken the training.	Carri Brown	<p>All employees are signed up for the training. Employees who have already graduated from the course indicated that it was helpful to their work. Leadership is at all levels of the organization. Participants have reported positive benefits. Referrals to other departments were made.</p>
One-on-one meetings & coaching/combined with "stay" interviews	Throughout 2022	Carri Brown	<p>Employees have opportunities for one-on-one times with the Auditor. The purpose is to coach and to gather information to set priorities.</p>

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Conduct weekly "touch base" meetings with all staff.	Meetings will be held on Mondays to touch base and set priorities.	Carri Brown	The Monday Morning Meetings have been held weekly since the end of October. Employees have commented that they appreciate the transparency and opportunity for questions and answers. There is a focus on ethics, inclusion, and overall goals and priorities.
Conduct an annual retreat.	January 2022 and January retreats thereafter	Carri Brown	Deliverables included: Mission Clarity; Individual Smart Goals; Ethics Training; Workplace Harassment, Recognition and Prevention Training; List of Inservice Ideas, etc. Performance Assessment training was had. Communications training is included.
Conduct individual strengths assessment and connect the assessments with tools to support the performance evaluation process.	January 2022 and ongoing	Carri Brown	Each employee has insight about individual strengths and how those strengths are needed for team success. Each supervisor has a reference tool to help with work assignments and supervision. Each team member has information to help build relationships.
Develop a book club for employees	Pilot in 2022; implement in 2023	All Team	By the end of January 2022, two leadership books were featured. Formalized plans are in progress for 2023 and 2024.
Prepare in-services to provide information about topics of interest to the team members.	Mid-2022 forward – through 2024	Carri Brown	Ideas obtained at the retreat were implemented. CPR and AED training was scheduled. A list of available training was prepared by the end of January 2022. Ethics, Mindfulness, Inclusion, and Health are topics of interest. A mini retreat will be held in May.
Complete at least two activities for individual recognition and two activities for team building	2022-2024	Carri Brown, Rachel Elsea, Bev Anders, and Stacy Knight	Recognition is in place (GEMS, certificates, & NACo graduation); four+ potlucks were scheduled in 2022. Other events are scheduled, such as an MLK Day celebration in partnership with the courts; "Living our Values" with a traveling trophy was added 6.22
COMMENTS The above task list is not inclusive of all activities. A baseline survey (anonymous) was conducted in order to evaluate effectiveness of management actions.			

STRATEGIC THEME

Update Processes to Add Value

CHAMPIONS: Chris Wagner and Josh Harper

WORK GROUP MEMBERS: All team members with subgroups defined by function

TARGETED OUTCOMES: Exceptional public service; improved accountability; effective processes; brand of excellence

Action Step(s)	Task Completion / Review Date	Assigned To	Results
Develop Payroll Trainers/Schedule of Training Activities	May 2022	Jen Dickerson, Michelle Wright	Improved knowledge of payroll process; training with key departments, such as the Sheriff, was in place by February 2022. Additional outreach to departments has been completed.
Create Drop in Option for Payroll; develop intentional departmental outreach for Financial Systems	January 2023 and ongoing	Jen Dickerson, and Michelle Wright; David Miller and team	Improved internal customer service for payroll officers; improved outreach for internal customers
Document Payroll procedures & Hold vendor accountable for services	2022 and ongoing	Jen Dickerson	Payroll cycles in compliance and with no errors, accomplished efficiently; training of staff is in progress. Updates are current.
Examine Payroll processes for improvement using a kaizen type approach	2022 and ongoing	Tonya Wright, Christina Wetzel, and Jennifer Harmon	Increased efficiency and coordination with departments
Hold a mini retreat with HR to recognize unity of purpose & common goals, focus on onboarding and reconciliations; include a process to connect with IT and improve processes for newly hired employees	2023	Jen Dickerson and Michelle Wright	Improved relationship with HR; improved internal services; improved employee experience
Train new BOR Administrator	March 2022 forward	Dave Burgei, Coordinating with contracted support and staff	Transfer of BOR Administration knowledge; transfer appraisal staff knowledge to BOR Administrator; refined processes (agendas, etc.)
Define Prosecutor & Auditor BOR duties	March 2022	BOR Administrator and leadership	Clarity of duties; efficiency; accomplished in April 2022
Develop a Financial Systems Work Group	2022	Chris Wagner and David Miller	Improved Organizational Knowledge; correct ACH pay-ins; review of audit recommendations
Examine year end processes for potential to have dual years open	2023-2024	Chris Wagner	Improved internal and external services for accounts payable

STRATEGIC THEME			
Update Processes to Add Value - Continued			
CHAMPION: Chris Wagner and Josh Harper			
WORK GROUP MEMBERS: All team members with subgroups defined by function			
TARGETED OUTCOMES: Exceptional public service; improved accountability; effective processes; brand of excellence			
Action Step(s)	Task Completion / Review Date	Assigned To	Results
Pilot evening hours for REA/Hold an "Information Night"	2023-2024	Josh Harper	Determine if evening hours and virtual options have use for the public; examination of scheduling tools.
Prepare for informal hearings for REA, examine process for improvement; include personal meetings with virtual, phone, and in -person options.	2022	Dave Burgei and Josh Harper	Better public understanding of appraisal process; using more technology for personal service. Connected with Pickerington library for support with civic education and services.
Review appraisal notices and make edits if needed; create fact sheet and website updates	2022	Dave Burgei and Carri Brown	Improved knowledge about process for the public; video s created in 2022
Waive requirement for formal hearings with the Budget Commission; align estimates of revenues with Commission long-term planning tool	Feb 2022	Carri Brown, David Miller, Chris Wagner, and Josh Van Dyke	Increased efficiency; waived 2.2022; new process piloted with success in April 2022; revenue estimates are aligned; 2023 estimates are under review
Update the Hotel/Motel lodging procedures using technology (artificial intelligence); issue third party contract; train administration team members so that questions can be answered; monitor contract	By the end of July 2022 and ongoing	Josh Van Dyke, Chris Wagner, David Miller, and Bev Anders	Improved public knowledge; improved process, and funding for the tourism related agencies; fact sheets were in place by February 2022; contracted online services are expected by mid-August 2022
Update the minimum standards for conveyance of property	Complete by Dec. 2022	Andy Boystel	Improved standards and public knowledge of such standards; improved public service; hearing dates for 2022 are set
Review school board requests relating to levies and evaluation of language	2022	Carri Brown, David Miller, & Josh Van Dyke	Increased organizational knowledge and networking
Prepare documentation and training for fuel card, credit card, and vendor card policy	2022	Chris Wagner, David Miller, and David Burgei	Improved internal control; review completed in February 2022; documenting procedures

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Participate in solar work group with SWCD and others	2022-2024	Carri Brown and Nick Dilley	Improved organizational knowledge & recommendations
Participate in stormwater utility work group	2023-2024	Carri Brown, Dave Burgei, and David Miller	Policy recommendation for improved public service; Connecting with County Engineer who will lead the group
Finalize projects relating to DMDs	2024	Josh Van Dyke and David Miller	Completion of project begun in 2016; improved records and understanding of that project with the County Engineer; define goals
Develop the GIS team; participate in recruitment, retention and recognition activities	2022 and ongoing	Nick Dilley & group, Curt Truax, Stacy Knight, & Randy Carter	Improved use of GIS tools consistent with growth of the county; improved recruitment, retention and recognition
Monitoring of Financial Systems contracts; Convert to SaaS for enterprise resource planning and time and attendance modules	2022 -2024	David Miller	Improved control and quality assurance; creation of monitoring spreadsheet; conversion to SaaS for multiple improvements noted on the IT template reporting module
Monitoring of REA related contracts	2022 - 2024	Dave Burgei	Improved control and quality assurance; creation of monitoring spreadsheet
Develop team mission statements and contact information for communication; begin tracking workload and outcome measures	2022	All Teams	Improved knowledge of who to contact for what purpose; announcements made during Sunshine Week; issue reports by the end of each year
Training on CRMS process & creation of contract monitoring tool	2022	Rachel Elsea and Managers	Improved understanding of contracting authority process
Organize tax pay-ins to support ADAMH and DD with more efficiency	2022 and ongoing	Chris Wagner and Bev Anders	Accomplished by April 2022; proper ACH pay-ins and organizational efficiency
Improve timeliness of 2% reimbursement of internal service costs	2022 and ongoing	Chris Wagner	Accomplished by April 2022; process is now up to date
Ensure reconciliation of all fiduciary funds	2022 and annually going forward	Chris Wagner and Jen Dickerson	Assurance of reconciliation for deductions; improved financial reporting
Develop an improved process for reporting expenditures similar to a checkbook fashion	2023	David Miller	Increased transparency to supplement reports
Coordinate with the County Recorder and others about "Safe at Home" reporting	By the end of 2022	Carri Brown	Compliance with legislation; no new participants by 7.7.2022
Establish a formal process for a change of address for REA	2023	Josh Harper	Improve public service and understanding
Implement the Excellence Project	2022	Carri Brown and Managers	Every moment is an opportunity to show excellence – cite examples for improvement each week

COMMENTS The above task list in not inclusive of all activities.

STRATEGIC THEME			
Focus on Strengths & Customer Service			
CHAMPION: Patrick Brighton, David Miller, and Dave Burgei			
WORK GROUP MEMBERS: Managers			
TARGETED OUTCOMES: Brand of excellence in public service			
Action Step(s)	Task Completion / Review Date	Assigned To	Results
Communicate individual strengths focus; conduct assessment to identify individual strengths and compile helpful notes for supervisors and employees	January 2022 and ongoing	Carri Brown	Positive communication about strengths; team cohesiveness and increased organizational commitment and individual job satisfaction; completed in January 2022
Performance assessment training and developing ways to maximize the individual and team strengths	January 2022	Carri Brown	Improved understanding of evaluation process; response to employee and manager requests
Establish customer service standards	January 2022 and ongoing	Carri Brown	Common sense of urgency; updated PRR policy; ongoing tracking; average time of response for PRR is one day
Provide training on customer service topics and research	January 2022	Carri Brown	Common understanding of customer service expectations
Encourage use of GEMS and Bravos	January 2022 and ongoing	All Team Members	Shared appreciation and motivation for team members; (GEMS are down as of 7.7.2022)
Note positive examples of customer service weekly	During Monday Morning meetings	All Team Members	Improved understanding of internal and external customer service; increased employee commitment to customer service
Develop an office wide calendar	For 2023	Rachel Elsea, David Miller, Dave Burgei	Improved planning
Develop an in-training position for Weights and Measures	By the end of 2022	Patrick Brighton	Increased connections with workforce development
Review and document TIRC processes, conduct cross training and help entities establish schedules	2022-2024	Rachel Elsea, Josh Van Dyke and David Miller	Increased connections with economic development; good planning for future growth; transparency of multi-jurisdictional activity
Share "word of the day" or other tidbits of knowledge during Monday Morning Meetings; share one form or process for functional areas during the Monday Morning Meetings.	2022-2024	Jessica, Rachel Enmen, Crystal, and Robin and others (rotating) and All Managers	Increased knowledge and participation; relationship building among teams; increased organizational knowledge about functional areas of the office.

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Develop job shadowing for team members as requested	2022-2024	Angel Horn, Crystal Walker, Robin Balthaser, Lori H., Lori K., Meagen B., and Julie White	Improved organizational knowledge and team cohesiveness; improved ability to cover for planned absences
Develop teeny tiny trainings	2023-2024	Chris Wagner and team	Improved organizational knowledge; short trainings are available to help with departments.
Adjust inventory assignments to a month selected by the county departments	2022- 2023	Angel Horn	Better time management and support of financial officers; survey was completed in April 2022
Update the Internal Control Manual	2022-2023	Chris Wagner	Improved organizational knowledge for financial officers and leaders
Update the Continuity of Operations Plan for Financial Systems and Real Estate Assessment	2022 and annually	David Miller and David Burgei	Improved service and ability to respond to emergencies
Meet deadlines for triennial update	2022	David Burgei and Josh Harper	Monthly meetings show the process is on track; state recommendations were received in April 2022; the next deadline is in July 2022
Update physical location at the Administrative Courthouse	2022	David Miller and Work Group	Improved internal and external service; better communications; better use of square footage of the historical building
Participate in county-wide work groups, such as retention and recruitment work group, environmental stewardship work group, and IT strategies work group, and others	2022 and ongoing	Carri Brown, Jen Dickerson, Chris Wagner, and Jen Dickerson	A list of all meetings and work groups with purpose statements is available
Develop roundtable process for Auditor, Recorder, and Treasurer	2023, pilot in 2022	Josh Van Dyke	Improve organizational knowledge and understanding of services
Implement Happiness Project	2022	Carri Brown, Bev Anders, and Stacy Knight	Happiness comes from making others happy. Design ways at least 2 ways to participate in events and volunteer activities to support those struggling with homelessness, recovery, or poverty; establish ways to work on volunteer activities together; volunteered for recovery programs and Habitat for Humanity (on own time) in 2022
Develop two-week onboarding process for newly hired employees, with templates	2022	David Miller and David Burgei	Piloting with two new employees, working well

COMMENTS The above task list is not inclusive of all activities. It is representative of the activities which were highlighted in an initial analysis during a collaborative planning review.

STRATEGIC THEME			
Improve Communication and Outreach			
CHAMPION: Rachel Elsea			
WORK GROUP MEMBERS: All Managers			
TARGETED OUTCOMES: Improved civic education and outreach			
Action Step(s)	Task Completion / Review Date	Assigned To	Results
Create a newsletter and fact sheets; update website and intranet; build a stronger social media presence	Mid-2022	Rachel Elsea and team members	Improved civic education and outreach
Develop a Speakers' Bureau with at least four speaking engagements annually	2023-2024 (formally)	Rachel Elsea and Carri Brown	Improved civic education and outreach; conducted multiple presentations in 2022 to prepare for 2023 forward
Create "how it works" videos, being sure to include multiple departments, such as the Treasurer or Recorder, as needed; include multiple processes, too, including BOR and tax exemption process	2023	Rachel Elsea, Jessica, Andy, and Stacy, and others	Improved civic education and outreach; virtual work group created in January 2022; three press releases were prepared for Sunshine Week 2022; a video about the role of appraisers was introduced in April and several counties are modeling the video; a video about calculating real estate taxes was completed in May; the BOR video was completed in June
Attend at least one of each of the 13 township meetings throughout the year	2022-2024	Carri, Rachel, and Managers	Additional outreach and communication
Attend at least one of each of the school board meetings	2022-2024	Carri, Rachel, and Managers	Additional outreach and communication
Attend at least one of each city/village council meetings throughout the year	2022-2024	Carri, Rachel, and Managers	Additional outreach and communication
Develop a communications and social media strategy; participate in inclusion and respect work group and develop that lens for policies	2022-2024	Rachel Elsea and Carri Brown and team members	Clear understanding of communication goals; increased inclusion and respect; updated videos to include closed captions
Evaluate possibility of an Ohio Chapter of IAAO – share information with private appraisers	2022 - 2024	Josh Harper and Team	Improved organizational knowledge; attended educational meetings with local private appraisers
Develop team purpose statements and draft a new directory; distribute directory	2022 and ongoing	Rachel Elsea	Improved ability to communicate purpose; directory distributed in January 2022; it was updated as needed; we added notary notations for accessibility

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Prepare for Sunshine Week (annually)	February 2022 and annually	Rachel Elsea, Makala, Andy, Jessica, Chris, Carri	Improved civic education and outreach; three press releases were available for Sunshine Week in 2022; additional press releases and postings were issued
Prepare at least 12 press releases or op-ed pieces annually on newsworthy topics	2022-2024	Rachel Elsea and Managers	Improved civic education and outreach
Focus on a specific communication strategy for reappraisal process	Mid-2022 and ongoing	Rachel Elsea, Dave Burgei, Josh Harper	Improved civic education and outreach
Plan for awareness activities for 50+ accounting professionals in the county	2022 and annually	Chris Wagner, Josh Van Dyke, and Carri Brown	Proclamation and activities are ready for the third quarter of 2022
Plan awareness activities for appraisal professionals and real estate assessment	2022 and annually	Josh Van Dyke and Carri Brown	Proclamation and activities are ready for the beginning of 2023; resolution in December of 2022
Plan for an informational booth at the county fair to pilot a presence	2022	Noel Soddors and work group	Improved opportunities to provide information and build community relationships
Create a process for notification of square footage changes, such as with finished basements; an example is a postcard template with a phone number for follow up information; engage real estate agents and title agencies	2023 forward, pilot in 2023	Josh Harper and Real Estate Team	Fewer surprises for homeowners who might not have been informed by real estate agents or title agencies
Create an annual programmatic report	2022 and annually	Rachel Elsea	Tracking of workload measures and outcomes began in the first quarter of 2022
COMMENTS The above task list is not inclusive of all activities.			

STRATEGIC THEME			
Improve Use of Technology and Records Processes			
CHAMPION: Jen Dickerson			
WORK GROUP MEMBERS: Managers			
TARGETED OUTCOMES: Improved use of technology and records processes			
Action Step(s)	Task Completion / Review Date	Assigned To	Results
Dissolve Data Board and re-establish Records Commission	2022	Carri Brown and Rachel Elsea	Clear priorities and path for a stronger foundation for IT functions; Data Board dissolved; Position descriptions updated. Records Commission process is working well in partnership.
Participate in the Records Commission Meetings, review office procedures	2022 and ongoing	Rachel Elsea, Carri Brown	Proper records management; designation letters were signed, and meetings are being held.
Implement electronic signature process	2022	Dave Burgei and David Miller	Improved efficiency; implemented in 2022
Ensure Cybersecurity training is taken by all team members	End of 2022 and annually	All team members	Improved cybersecurity measures and knowledge
Develop a GIS strategic plan for use of applications and internal/external services	2023-2024	Nick Dilley	Improved access and use of GIS tools consistent with growth of the county
Implement Point n Pay type technology at REA and with the hotel/motel lodging tax collections; Use technology to implement new hotel/motel lodging tax collection process	2022 and ongoing	Josh Harper, David Miller, Chris Wagner, and Team	Improved use of available technology
Take Sunshine Law Training	End of 2023 and annually as assigned	All Managers	Improved knowledge and compliance (Carri, directors, and public information officer have taken the training)
Focus on Tyler Technology related improvements and monitoring for Financial Systems	2022 and ongoing	Jen Dickerson & David Miller	Improved use of available technology.
Support the Board of Elections, Hunters Run Conservancy District, SWCD, and others by answering data requests	2022 and ongoing	Nick Dilley	Improved use of available technology

Strategic Plan for the County Auditor's Office
2022-2024
Adopted January 2022
Updated Regularly; Last Updated 7 21 2022

Review websites for improvement and ADA compliance	By the end of 2023 and annually	Rachel Elsea, David Burgei, & David Miller	Improved access to online information; REA updates made in February 2022; appraisal video updated
Convert to a Software as Service Process for Financial Systems	2022	David Miller	IT template completed and evaluated; resolution and recommendations prepared April 1, 2022. Appropriations were approved. Contract development was completed, and implementation is desired to begin in August 2022
By partnering with vendors and using technology, the CAUV program leaders will expedite its review of parcels to increase outreach to assist residents with the application process; outreach will consist of mailing and phone calls to facilitate the application process proactively	2022 and ongoing	Greg Forquer and Makayla Finley	More than 2,400 applicants now participate in the Current Agriculture Use Value program. Timely outreach to support this part of the economy helps residents participate in the statewide program and reduce their property tax bills. Outreach helps to reduce issues or problems that occur after the filing deadline and improved civic understanding of the program.

Team Purpose Statements

Payroll Systems Management

As a centralized point for responsive information about payroll and related Auditor's Office systems, the purpose of Payroll Systems Management is to deliver exceptional customer service by ensuring employees are paid according to approved payroll schedules in compliance with regulations and policy while sustaining effective systems, data, records, reports, and relationships.

Financial Systems/Annual Comprehensive Financial Report Management

The purpose of the Financial Systems/ACFR Management team is to provide superior customer service to the county and vendors by preparing award-winning financial reports and disbursing funds in an accurate, timely, reliable, and technologically proficient manner while complying with regulations and policy.

Settlements and Administration

The Settlements and Administration team calculates settlements for public entities; organizes data for tax exemptions, special assessments, levies, and Budget Commission processes; issues multiple licenses and homestead exemptions; and provides courteous administrative support with purpose, integrity, gratitude, and efficiency.

Weights and Measures Inspection

Connecting with multiple departments and businesses, Weights and Measures provides equity in the marketplace by testing and inspecting weighing and measuring devices and ensuring appropriate commercial practices are in place.

Geographical Information System

With efficiency and accuracy, GIS manages and organizes spatial and tabular datasets while developing accessible applications for the distribution, utilization, and integration of GIS technology for public entities and citizens of Fairfield County.

Map Room Management

Coordinating with the County Engineer and other leaders, the Map Room team reviews and researches surveys, deeds, and legal descriptions of property for compliance with established conveyance standards while maintaining more than 1,200 tax maps and 71,600 parcel records.

Board of Revision Administration

With expertise in codified processes, the BOR hears complaints on the market value of property and adjusts values as of the tax lien date when justified by evidence presented during the hearings.

Real Estate Management

With fairness and equity, the Real Estate team transfers and appraises real property and also administers state programs for owners of agricultural properties to receive tax savings.

Evaluation of the Strategic Plan

The initial plan was presented for additional input and feedback in January 2022. Ongoing updates at each roundtable meeting and at various other meetings are expected. The themes will be communicated with all employees and stakeholders.

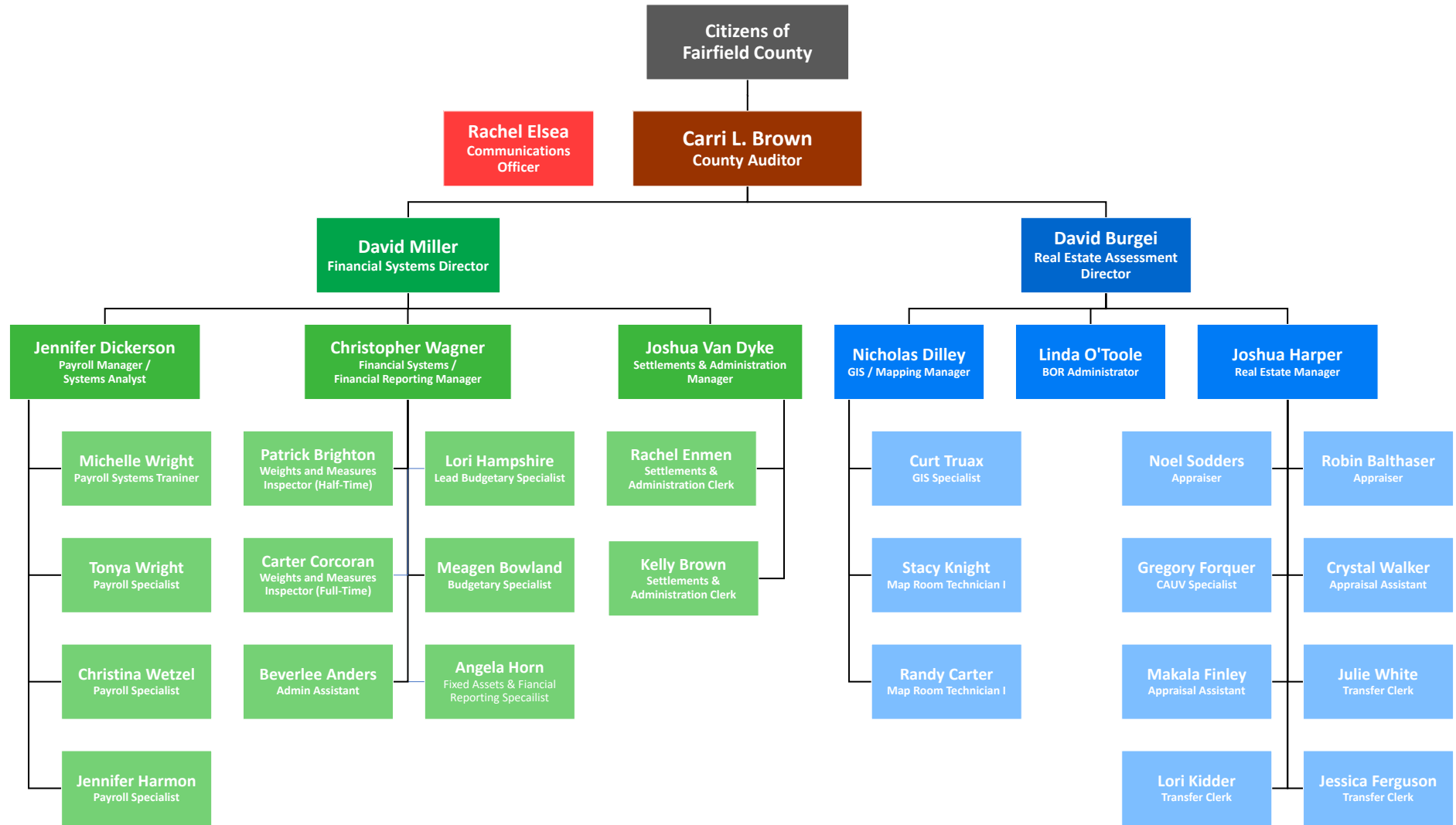
An electronic survey was issued through the end of December 2021. Stakeholders were invited to participate in this way either anonymously or by name. In addition, feedback and input was sought from multiple stakeholders by email and in person. There is an expectation of ongoing ways to obtain input and feedback. The plan is on the website.

A strategic plan is document for guidance; it is a living document. Metrics will be reviewed throughout the plan period to help document progress.

If there are any questions or comments about the strategic plan, please contact Carri Brown, carri.brown@fairfieldcountyohio.gov or (740) 652-7096.

Exhibits

- Table of Organization
- Narrative about the Team
- Individual Strengths
- Alignment with the Countywide Strategic Report



31.375 FTE on Auditor TO
25 FTE on Prosecutor TO
32 positios filled
0 vacancies

For Auditor Use
41.55%: General Fund
58.45%: REA Fund
Effective Date: 7.1.2022

“Success is the sum of small efforts, repeated day-in and day-out.” – Robert Collier

***"Individuals are always stronger when they have their
successes and strengths clearly in mind."
— Don Clifton***

Father of Strengths Psychology and Inventor of CliftonStrengths

County Auditor Table of Organization

33.875 employees are on the full table of organization. Also, .25 FTE is supported by REA for the County Prosecutor.

Of the County Auditor employees:

13.4375 FTEs or 39.67% are supported by the General Fund.
20.4375 FTEs or 60.33% are supported by the REA fund.

As of 12.22.2021, there were 5 *vacancies*:

- Settlements and Administration Clerk (based on an internal promotion and transfer)
- Weights and Measures Inspector In-Training (to be posted later in 2022, connecting with career navigators)
- 2 GIS Specialists (based on REA restructuring)
- BOR Administrator (based on Jason Dolin's retirement)

Of 29 current employees (not including the elected official),

- 31% have an Associate Degree or two-year certificate within a technical discipline
- 26% have a bachelor's degree
- 9% have a master's degree
- 29% have a professional certification or association certificate

The ***average number of years of experience is 13 years.***

*Demographic statistics show amazing strengths. Statistics are above US Census & national and state averages for **education and experience.***

County Auditor's Office employees are highly educated, trained, and experienced.

There is exceptional participation from County Auditor team members in education, civic, and community efforts.

- For example, the team includes members of the County Auditor's Association, AGA, GFOA, and IAAO.
- There is also participation on the Regional Planning Commission, Destination Downtown, and Special Improvement District of Lancaster.
- The team participates in multiple volunteer activities for United Way, Salvation Army, various Chambers, the Masons, Moose Lodge, the Lancaster Ohio Biker Club, Eagles, and Rotary Clubs.
- Employees are also coaches and athletic boosters (hockey and archery are favorites).
- Multiple employees volunteer for churches and or serve as a church elder.
- The team even includes a school board member and President of the Pink Hope Society.
- And by the end of 2022, all team members will hold a certificate as a NACo High-Performance Leader.

RESPONSIBILITY Josh VanDyke (4) Bev (5) Christina (3) Robin (3) Meagen (4) Angel (1) Lori H (1) Michelle (3) Rachel Elsea (5) Nick (1) Jessica (1) Stacy (4) Linda (5)	ACHIEVER Carri (3) Makala (1) Christina (1) Robin (2) Angel (4) Noel (1) Josh H (1) Crystal (1) Stacy (3) Tonya (4) Chris (1)	HARMONY Patrick (1) Christina (5) Meagen (5) Tonya (5) Nick (3) Stacy (1) Lori K (3) Julie (1) Jessica (3) David M (3) Randy (4) <hr/> COMMAND Chris (2)	CONSISTENCY Josh VanDyke (3) Bev (3) Meagen (2) Lori H (2) Tonya (3) Curtis (1) Julie (3) Dave B (5) Jennifer (1) <hr/> IDEATION Josh H. (4)
DELIBERATIVE Josh VanDyke (2) Tonya (2) Rachel Elsea (1) Nick (2) Curtis (4) Greg (2) Dave B. (1)	POSITIVITY Bev (4) Patrick (4) Angel (5) Crystal (3) Lori K (2) Julie (5) David M (4)	LEARNER Carri (4) Jen (4) Nick (4) Robin (1) Rachel Enmen (5) Josh H (5) Crystal (4) Jennifer (2)	EMPATHY Lori K (1) Julie (4) Rachel Enmen (2) Meagen (1) Michelle (4) Curtis (3) Stacy (2) Makala (4) Jennifer (3) Randy (2)
DEVELOPER Bev (2) Makala (3) Angel (3) Jen (2) Lori K (4) David M (2) Randy (1)	RELATOR Greg (5) Patrick (3) Stacy (3) Jessica (5) Angel (2) Rachel Elsea (4) Curtis (5) Linda (3)	INPUT Carri (5) Greg (4) Jen (5) Robin (4) Rachel Enmen (1) Crystal (2)	BELIEF Josh H. (3) Rachel Elsea (2) David M. (5)
MAXIMIZER Carri (1) Dave B. (2) Josh VanDyke (5) Jessica (4) Carter (3)	ANALYTICAL Josh VanDyke (1) Nick (5) Chris (5) Greg (3) Dave B. (4) Linda (4) Randy (3)	COMMUNICATION Noel (4) Lori H (5) Michelle (2)	STRATEGIC Carri (2) Noel (2) Rachel Elsea (3) Carter (5)
INCLUDER Julie (2) Bev (1) Meagen (3) Lori K (5) Lori H (3) Jen (1)	CONNECTEDNESS Rachel Enmen (4) Jen (3) David M. (1) Linda (2)	FUTURISTIC Robin (5) <hr/> SELF ASSURANCE Noel (3) Chris (3)	COMPETITION Chris (4) <hr/> CONTEXT Patrick (5) Christina (4) Greg (1) Carter (1)
INTELLECTION Makala (5) Rachel Enmen (3) Crystal (5) Jennifer (4) Randy (5) <hr/> RESTORATIVE Makala (2)	ADAPTABILITY Patrick (2) Curtis (2) Jessica (2) Carter (4)	DISCIPLINE Christina (2) Dave B (3) Jennifer (5) <hr/> INDIVIDUALIZATION Michelle (1) Linda (1) Carter (2)	WOO Noel (5) Lori H (4) Michelle (5)

RESPONSIBILITY Diligent Loyal Driven Dependable Committed Conscientious	RESTORATIVE Responsive Investigative Problem-oriented Weakness-oriented Unintimidated Insightful		DELIBERATIVE Careful Conservative Sensible Thoughtful Observant Vigilant	CONSISTENCY Fair Equal Consistent Practical Efficient Predictable
ADAPTABILITY Flexible Responsive Present Spontaneous Agreeable Easy-going	ACHIEVER Driven Diligent Intense Independent Productive Self-motivated		DEVELOPER Encouraging Investing Helpful Observant Patient Growth-oriented	EMPATHY Emotional Expressive Sensitive Intuitive Helpful Confidential
HARMONY Practical Concrete Conflict-reducing Collaborative Agreeable Task-oriented	POSITIVITY Fun Hopeful Generous Enthusiastic Dramatic Influential		DISCIPLINE Timely Organized Efficient Meticulous Planned Detail-oriented	BELIEF Stable Unchanging Principled Passionate Committed Self-sacrificing
RELATOR Friendly Caring Authentic Intimate Genuine Transparent	ANALYTICAL Objective Data-driven Skeptical Questioning Scientific Dispassionate	IDEATION Spontaneous Creative Innovative Collaborative Insightful Resourceful	STRATEGIC Intuitive Anticipating Thoughtful Insightful Option-aware Future-oriented	CONTEXT Historical Perceptive Highlighting Collecting Studious Orienting
ACTIVATOR Impatient Dynamic Initiating Catalytic Fast Action-oriented	INDIVIDUALIZATION Unique Aware Fair Insightful Diverse People-oriented	FUTURISTIC Creative Inspiring Anticipating Imaginative Perceptive Future-minded	COMPETITION Scorekeeping Comparing Winning Measuring Selective Driven	INCLUDER Accepting Tolerant Perceptive Integrating Welcoming Others-oriented
MAXIMIZER Quality-oriented Judging Sorting Selective Results-oriented Excellence-aware	LEARNER Curious Interested Inquisitive Open-minded Studious Passionate	COMMUNICAITON Talkative Transparent Interactive Expressive Captivating Presenting	WOO Charming Outgoing Gregarious Engaging Initiating Socially energetic	INTELLECTION Introspective Solitary Intellectual Reflective Intense Thinking-based
INPUT Resourceful Collecting Inquisitive Generous Knowledgeable Investigative	SELF-ASSURANCE Independent Confident Self-Aware Self-Sufficient Persistent Controlling	COMMAND Decisive Persuasive Intimidating Assertive Opinionated Candid	CONNECTEDNESS Integrating Spiritual Comforting Philosophic Counseling Listening	

Carri	Maximizer, Strategic, Achiever, Learner, Input
Bev	Includer, Developer, Consistency, Positivity, Responsibility
Robin	Learner, Achiever, Responsibility, Input, Futuristic
Meagen	Empathy, Consistency, Includer, Responsibility, Harmony
Patrick	Harmony, Adaptability, Relator, Positivity, Context
Dave B.	Deliberative, Maximizer, Discipline, Analytical, Consistency
Jen	Includer, Developer, Connectedness, Learner, Input
Nick	Responsibility, Deliberative, Harmony, Learner, Analytical
Rachel Elsea	Deliberative, Belief, Strategic, Relator, Responsibility
Rachel Enmen	Input, Empathy, Intellection, Connectedness, Learner
Jessica	Responsibility, Adaptability, Harmony, Maximizer, Relator
Makala	Achiever, Restorative, Developer, Empathy, Intellection
Greg	Context, Deliberative, Analytical, Input, Realtor
Lori H.	Responsibility, Consistency, Includer, Woo, Communication
Josh H.	Achiever, Relator, Belief, Ideation, Learner
Angel	Responsibility, Relator, Developer, Achiever, Positivity
Lori K.	Empathy, Positivity, Harmony, Developer, Includer
Stacy	Harmony, Empathy, Relator, Responsibility, Achiever
David M.	Connectedness, Developer, Harmony, Positivity, Belief
Noel	Achiever, Strategic, Self-Assurance, Communication, Woo
Curtis	Consistency, Adaptability, Empathy, Deliberative, Relator
Chris	Achiever, Command, Self-Assurance, Competition, Analytical
Josh Van Dyke	Analytical, Deliberative, Consistency, Responsibility, Maximizer
Crystal	Achiever, Input, Positivity, Learner, Intellection
Christina	Achiever, Discipline, Responsibility, Context, Harmony
Julie	Harmony, Includer, Consistency, Empathy, Positivity
Michelle	Individualization, Communication, Responsibility, Empathy, Woo
Tonya	Realtor, Deliberative, Consistency, Achiever, Harmony
Jennifer	Consistency, Learner, Empathy, Intellection, Discipline
Linda	Individualization, Connectedness, Relator, Analytical, Responsibility
Carter	Context, Individualization, Maximizer, Adaptability, Strategic
Randy	Developer, Empathy, Analytical, Harmony, Intellection

STRENGTH	WHO HAS IT	NOTES FOR EMPLOYEE	NOTES FOR SUPERVISOR
Restorative	Makala (2)	<ul style="list-style-type: none"> • Enjoys fixing problems • Can be overly self-critical; try to redirect negative self-talk to things that can actually be improved/fixed, such as improving knowledge or skill deficits • Should pause before rushing in and solving other people's problems; need to let them figure it out themselves; saving the day may actually hinder person's ability to be self-sufficient • Is well-equipped not only to tackle existing problems but prevent and anticipate ones in the future; share this foresight with others • Constant improvement is one of hallmarks of this talent; take opportunities to improve your skills and enhance your abilities through trainings or specializations 	<ul style="list-style-type: none"> • Ask for their observations when you need to identify a problem within your organization; Restoratives will provide acute insight • Turn to Restoratives when a situation needs immediate improvement as they will not panic but will respond in a focused, professional way • Offer support when Restoratives meet a particularly difficult problem; they define themselves by their ability to cope and may feel personally defeated if a problem remains unresolved. • Encourage Restoratives to take advantage of trainings / personal development opportunities
Achiever	Carri (3) Makala (1) Christina (1) Robin (2) Angel (4) Noel (1) Josh H (1) Crystal (1) Stacy (3) Tonya (4) Chris (1)	<ul style="list-style-type: none"> • Relishes feeling busy, especially with measurable projects and outcomes (feeling that you have accomplished sometime finite) • Take time to acknowledge your success before moving on to next task • Self-motivated; will benefit from partnering from other hard workers • Enjoys launching new projects and initiatives, as the prospect of what lies ahead is more exciting than what you have accomplished in past • Make sure that you do not lose quality in your eagerness to “do more” 	<ul style="list-style-type: none"> • Thrives off of work environment that allows them to work as hard as they want and measure their own productivity • Achievers appreciate productive meetings with agendas and measurable action items • Work alongside Achievers and pair them with other hard workers; have low tolerance for “slackers” • Achievers enjoy being busy • Achievers will appreciate attention given to the time and effort they spent accomplishing a certain goal, i.e., “How late did you have to work to get this done?” or “Wow: you have put in a lot of time to accomplish this task.”
Deliberative	Josh VanDyke (2) Tonya (2) Rachel Elsea (1) Nick (2) Curtis (4)	<ul style="list-style-type: none"> • Is naturally careful, vigilant, and private. • Has naturally good judgment and is often sought as a valuable sounding board 	<ul style="list-style-type: none"> • Partners well with Command, Self-Assurance and/or Activator talents. • Functions as a “brake” for more impulsive personality types; helpful to include them in workgroups with impulsive people; they

	Greg (2) Dave B. (1)	<ul style="list-style-type: none"> • Deliberative talent shouldn't be misconstrued as tentativeness or fear of action, but intentional careful decision-making • Others trust you because of your consideration and confidentiality in handling conflict • Naturally build friendships slowly and takes pride in small circle of good friends • Give yourself permission to withhold your opinion until you get all the facts and have time to think it over • Does not embrace change quickly; instead prefers to reflect on all possible outcomes before buying in 	<p>will have a “temporizing” effect and add needed thoughtfulness before action</p> <ul style="list-style-type: none"> • Respect their privacy; unless invited, do not push to become personal with them too quickly • Similarly, do not take it personally if they keep you at arm's length
Activator		<ul style="list-style-type: none"> • “When can we start?” • Always impatient for action • Likes to make own decisions and act on them • Skilled at transforming innovative ideas into immediate action • Helps remove barriers and move projects from discussion phase to implementation • Tenacity may be intimidating to others; you will be more effective if you have first earned others' trust and loyalty • Be strategic in using your Activation skills; consider the best people, time, and place to leverage your ideas 	<ul style="list-style-type: none"> • Prefers to be judged/evaluated on measurable outcomes rather than the process of getting there • Touching base with Activators every so often to ask for their insight and provide critical resources to turn ideas into actions • Partners well with Focus, Futuristic, Strategic, and Analytical as these individuals bring planning and direction to the table • Tell Activators that you know they can make things happen and need their help to do so; it will energize them • Listen to Activator's complaints—you may learn something. Then ask them to help launch solution to the complained-of problem; left unchecked, Activators can stir up negativity <p>Ask Activators about potential new goals and/or improvements they see within the Department and help them take steps towards starting them</p>
Responsibility	Josh VanDyke (4) Bev (5)	<ul style="list-style-type: none"> • Extremely dependable and accountable • Continue to volunteer for more responsibilities even if you are 	<ul style="list-style-type: none"> • Partners well with other Responsibility partners who share determination to get things done; BUT when this happens, clear

	Christina (3) Robin (3) Meagen (4) Angel (1) Lori H (1) Michelle (3) Rachel Elsea (5) Nick (1) Jessica (1) Stacy (4) Linda (5)	inexperienced; you thrive off of taking on new responsibilities <ul style="list-style-type: none"> • Must utilize the ability to say “no” sometimes; has tendency to over-extend commitments because of desire to be helpful • Naturally desires to take full ownership of projects • Becomes quickly frustrated with those who do not live up to their commitments 	boundaries need set so each can feel ownership for their tasks and not step on each other’s toes <ul style="list-style-type: none"> • Also partners well with Discipline and Focus as they will help Responsibility to stay on track and prevent “overload” or over-extension • Prefers the freedom to just get things done and not check in often—just at the end of a project as they should be trusted to get project done • Enjoys concrete expectations so they can ensure they have “hit the mark” as promised • Values quality over speed; may work slower to produce quality results • If Responsibility does not have correlating Discipline talents, be careful not to overload them with too much work; help them see that taking on too much may lead to a lack of quality
Relator	Greg (5) Patrick (3) Stacy (3) Jessica (5) Angel (2) Rachel Elsea (4) Curtis (5) Linda (3)	<ul style="list-style-type: none"> • Derives great pleasure and strength from being around close friends and values genuine relationships • More interested in character/personality than title or status • May tend to withhold most engaging aspects of self until you sense openness from other person; should try to proactively “put yourself out there” to encourage two-way relationship • No matter how busy work gets, should always make time for family and friends as they are your “fuel” • Values trust and loyalty 	<ul style="list-style-type: none"> • Thrives in a workplace culture where friendships are encouraged; will not do well in an overly formal workplace • Feels more comfortable being addressed by first name rather than formally • Enjoys socializing with colleagues outside of work, i.e., lunch, coffee, happy hours, to form more connected relationships at work • Don’t hesitate to tell Relators that you care about them; they will welcome the notion knowing that you personally connect with them • Can trust Relators with confidential information, as they are loyal and place a high value on trust
Discipline	Christina (2) Dave B (3) Jennifer (5)	<ul style="list-style-type: none"> • Prefers a predictable, ordered, planned, structured world • Excels in projects that require proofing and attention-to-detail review • Creates routines, values timelines and deadlines 	<ul style="list-style-type: none"> • Mistakes depress Disciplines, as precision is part of who they are; help them to move through these moments to prevent discouragement • Allow Disciplines to organize their space however they prefer so that “there is a place

		<ul style="list-style-type: none"> • Comforted by feeling in control of situations; is a perfectionist at heart • Must understand that not everyone feels similar urge for predictability; try to look past their sloppy processes and evaluate them on their results instead • Help others understand that your detail orientation and structured routines are not controlling or judgmental behavior but rather a way you keep track of your priorities amidst life's distractions • Allow yourself to check your work as often as necessary to make sure it is right—you have the urge to do it anyway • Don't be afraid to ask for specific timelines and/or deadlines; will help to motivate you 	<p>for everything and everything is in its place.”</p> <ul style="list-style-type: none"> • Will excel at projects that result in increased efficiencies • Prefers having timelines and deadlines and making step-by-step plans • Disciplines prefer to get work done ahead of schedule, so the more heads up you can give them with deadlines, the better. • Does not do well with surprises and/or changes in plans/priorities; will be distressing and may ruin their day • Make sure Discipline's colleagues understand their talent as a tool they use to be effective, not inflexible rigidity
Developer	Bev (2) Makala (3) Angel (3) Jen (2) Lori K (4) David M (2) Randy (1)	<ul style="list-style-type: none"> • Sees potential in others, looks for ways to challenge others and help them succeed • Others look to you for help and encouragement because they know your helpfulness is genuine • Keep a list of people you have helped to remind yourself of the effect you've had on them • Be sure to articulate the growth you see in others: it will encourage them • May feel compelled to mentor more people than is possible; but can still serve as a “mentor for the moment” i.e., short term • Be careful not to overinvest in losing causes 	<ul style="list-style-type: none"> • Developers will succeed in teaching, coaching, or mentoring roles • Partners well with Individualization talents, as they can assist Developers to identify others' greatest strengths • Reinforce Developer's ability to encourage others and help them succeed, i.e., “Your co-workers never would have been able to do that without you.” • Seek out Developer's insight if you are trying to recognize co-workers • Ask Developers for insight as to how to help YOU, as the supervisor, grow in your job and better supervise others
Consistency	Josh VanDyke (3) Bev (3) Meagen (2) Lori H (2) Tonya (3)	<ul style="list-style-type: none"> • Believes everyone should be treated the same; views self as a guardian against unfair advantages • Values predictability, evenhandedness, and fairness 	<ul style="list-style-type: none"> • Consistency talents will exceed in roles where they enforce compliance to a set of standards • Because Consistence values equality, they find it difficult to deal with individuals who bend the rules to fit their situation

	Curtis (1) Julie (3) Dave B (5) Jennifer (1)	<ul style="list-style-type: none"> • Make a list of the general rules of consistency by which you live—that you consider “non-negotiables”; counterintuitively, the clearer you are about these general rules, the more flexibility you will allow yourself within them • Excels in roles in which you help “level the playing field” for disadvantaged individuals • Believes that respect should only be given to those who truly do the work • Be sure to focus on co-worker’s performance results; your Consistency traits may lead you to overemphasize/judge HOW others get work done and ignore WHAT they get done • Tends to practice what you preach; low “say-do” gap; you consistently deliver on your promises 	<ul style="list-style-type: none"> • Partnering with Individualization and Maximizer may be beneficial as they can remind Consistency when it is appropriate to accommodate individual differences • Be supportive of Consistency during periods of change, as they are most comfortable with predictable patterns
Strategic	Carri (2) Noel (2) Rachel Elsea (3) Carter (5)	<ul style="list-style-type: none"> • Often ask “What if this happens?” “But what if this?” • Allow yourself time to muse about a goal you want to achieve until the patterns/issues emerge; this is vital to your Strategic thinking • Leads with their ideas • Ability to anticipate potential problems can be misconstrued as negativity; can shift this perception by not only pointing out the obstacle but also suggesting a way to prevent or overcome it • Explain to others that your Strategic thinking isn’t meant to belittle their ideas but is a natural propensity to consider all alternatives • Trust your intuition as often as possible, even if you are unable to rationally explain them yet 	<ul style="list-style-type: none"> • Strategic thinking is not a skill that can be taught; it is a distinct way of thinking and special perspective that allows them to see patterns while others see complexity • Strategic is especially adept at identifying repercussions quickly and clearly; with wise forethought, can be instrumental in removing barriers to success • Do not misconstrue Strategic thinking and analysis for negativity or resistance to change; solicit potential alternatives instead • Partners well with Activator: pairs need for action with need for anticipation • Involve Strategic in planning meetings and the launching of new initiatives, as they have an innovative yet procedural approach (“If this happened, what should we expect?”) • Give Strategic time to think through a situation before asking for their input

<p>Adaptability</p>	<p>Patrick (2) Curtis (2) Jessica (2) Carter (4)</p>	<ul style="list-style-type: none"> • Tends to live in the moment; views future as a place that you create out of the choices you make right now • Even-keeled even in times of crisis; explain to colleagues that it is productive flexibility and not just an “I don’t care” attitude • Doesn’t mean that you don’t have plans; just that you easily adapt to changing circumstances • Flexible person who can stay productive when demands of work are pulling in different directions • Often calm and reassuring to others amidst unforeseen conflict or change • More than about just “rolling with the punches” but about calmly, intelligently and readily responding to your circumstance • Be careful not to let others abuse your inherent flexibility and lose sight of long-term goals 	<ul style="list-style-type: none"> • Does not do well with roles that demand structure and predictability; these tasks will stifle Adaptability’s independence and quickly frustrate them • Partners well with Focus, Strategic or Belief, as they will help Adaptability to plan and shape long-term goals • If necessary to give Adaptability a “task list,” find a way to allow some flexibility or fun into how it is accomplished • Valuable addition to almost any team because of their even temper and flexibility • Does best with short-term assignments that require immediate action
<p>Empathy</p>	<p>Lori K (1) Julie (4) Rachel Enmen (2) Meagen (1) Michelle (4) Curtis (3) Stacy (2) Makala (4) Jennifer (3) Randy (2)</p>	<ul style="list-style-type: none"> • Skilled at sensing the emotions of those around you and appreciate different perspectives • Don’t necessarily agree with them, or pity them, or condone their behavior, but do understand it • Can use skill to help others be more aware when coworker is having a difficult time, as others do not pick up on sensitive situations as quickly • Act quickly and firmly when others behave in a way that is unhealthy for themselves or others • Be careful not to let your empathy for others overwhelm you; create a ritual at the end of the day to signal that work is over to prevent burnout • Celebrate others’ happinesses and successes (such as a kind word or note) 	<ul style="list-style-type: none"> • Partners well with Command and Activator; these skills will help Empathy take action even though people’s feelings may suffer as a result • Also benefits from interacting with other Empathys to bounce observations off of • Serves well in a mentoring or confidante capacity to others • Listen when Empathy has a “hunch” as their intuitions often stem from an emotional reading of the situation • Consult with Empathy to gauge the culture of the workplace and how particular people are feeling

		<p>as doing so will make a big impression and bring you satisfaction</p> <ul style="list-style-type: none"> Your talent is helpful when others are having difficulty understanding why an action is necessary as you are often able to sense what is missing 	
Communication	<p>Noel (4) Lori H (5) Michelle (2)</p>	<ul style="list-style-type: none"> Likes to explain, describe, speak in public, and to turn events into stories and tell them Has a desire to divert listener's attention towards you, capture it, and lock it in with your story Your words pique others' interests and inspire them to act Consider keeping a collection of stories, phrases, or quotes that speak to you for quick reference Notice your audience when you speak and note which parts of your presentation really engaged them; make sure to identify those parts to re-use again Even though improvising comes naturally, practice—an audience will respond best to presenters who know where they are headed 	<ul style="list-style-type: none"> People enjoy listening to Communication speak Does well in roles that require them to capture people's attention Invite Communication to social events and/or work gatherings as they help move conversation along and connect to others Ask Communicators to talk about their life and stories; they will enjoy telling and you will enjoy listening, thereby strengthening your relationship
Command	<p>Chris (2)</p>	<ul style="list-style-type: none"> Inclined to take charge; comfortable with imposing views on others Unafraid of confrontation; view confrontation as the first step towards resolution Push others to be clear-eyed, honest, take risks May be viewed as “intimidating” but people are still drawn to you for leadership and direction Practice words, tones, and technique to turn confrontation into persuasiveness Be aware that others may hesitate to share their opinions with you, as they may find your candor intimidating; address this by explaining that you are 	<ul style="list-style-type: none"> Prefers to speak plainly and directly about sensitive subjects Partners well with Woo and Empathy, as they will help Command navigate obstacles in relationships that can be circumvented rather than confronted In times of crisis, Command can be reassuring to others Encourage Command to take a lead on a committee or workgroup; may lead others to get things moving and spearhead a new initiative If you want a straightforward evaluation of the workplace, ask Command; they will not just “yes” you

		up front because its uncomfortable for you to keep things bottled up, not because you want to “scare” people	<ul style="list-style-type: none"> Do not threaten people with Command unless you are 100% ready to follow-through with consequences
Woo	Noel (5) Lori H (4) Michelle (5)	<ul style="list-style-type: none"> Stands for “winning others over”; enjoys the challenge of meeting new people and getting them to like you Not intimidated by strangers Rarely at a loss for words or uncomfortable around strangers; enjoy breaking the ice—but are content with short-term connections Make a list of all of the people you know and include a little bit about them to build a “connections” file Help others by initiating conversations and making them more comfortable in group settings Can be mistaken as insincerity or “overly friendly” so explain to others that networking just comes naturally and brings you pleasure 	<ul style="list-style-type: none"> Prefers a role where they can interact with many people Pairs well with Relator and Empathy talents, as they can help solidify relationships that you begin Also pairs well with other people with Woo, as they will help each other broaden each other’s connections Woo can “quicken the pulse” of any workplace, gathering or meeting; their presence often lends itself to the exchange of ideas Woo’s are great icebreakers, so it is helpful to have them as the “face” of any public-facing event; they will make others feel comfortable and put them at ease If Woo is quick to meet, greet, and then move on, don’t take it personally
Belief	Josh H. (3) Rachel Elsea (2) David M. (5)	<ul style="list-style-type: none"> Has certain core values that may vary, but typically they are family-oriented, altruistic, and/or spiritual These core values give Belief meaning, satisfaction, direction toward a consistent set of priorities which forms the foundation for your relationships Often referred to as “dependable” and told “I know where you stand.” Clarify your values by thinking of one of your “best days” and ask how your values played into your satisfaction of that day? How can you recreate that on a frequent basis? Remind others why their work is important and how it makes a difference—this realization comes naturally to you, but may not to others Maintain a gallery of letters/pictures of the people you have influenced and 	<ul style="list-style-type: none"> Work must be meaningful and aligned with core values; satisfaction is derived more from core principles than from money or prestige Seek help from Belief in drafting a mission or purpose statement for your organization or department Partners well with Futuristic talent, as they can help paint a picture of the direction in which your values will lead Often passionate about things close to their heart; try to connect it to their day-to-day work Actively learn and inquire about Belief’s family and community; by recognizing and respecting these commitments, you will earn respect

		<p>helped; when feeling down or overwhelmed, it will remind you of the difference you have made</p> <ul style="list-style-type: none"> • Make sure to balance career with your family; your devotion to your job cannot come at the expense of the strong commitment to your family • Accept that your values may differ from others; express your beliefs without being judgmental 	
Positivity	Bev (4) Patrick (4) Angel (5) Crystal (3) Lori K (2) Julie (5) David M (4)	<ul style="list-style-type: none"> • Lighthearted, generous with praise, quick to smile, and always on the lookout for the positive in the situation; • People want to be around you; your enthusiasm is contagious • Others often look to you for an emotional “lift” because of your energy and enthusiasm • Make sure your colleagues know your Positivity isn’t naivety: you know that bad things happen, you just prefer to focus on the good • Freely show your appreciation of others; make sure it is not vague, but encouragement that is specific and personal • Protect your Positivity: whiners and complainers will drain you • Help others see the good things they have or have accomplished in their lives; it will energize you both 	<ul style="list-style-type: none"> • Skilled at making things more exciting and vital; rarely “dragged down”; believe that work can be fun no matter the setbacks and often finds the humor in situations • Get Positivity involved in planning celebrations • Help Positivity to avoid negative environments and people; instead, pair with other Positivity to energize each other • Positivity can help make people excited about work through their humor and attitude • Do best providing a “spark” to generally positive people, not necessarily cheering up negative people
Analytical	Josh VanDyke (1) Nick (5) Chris (5) Greg (3) Dave B. (4) Linda (4) Randy (3)	<ul style="list-style-type: none"> • Challenges others by making them “prove it”; ensures that proposed theories are sound and make sense • Objective; values data; searches for patterns and connections in data and outcomes • Often viewed as logical and rigorous • Identify credible sources on which you can rely; you are at your best with data/information on-hand 	<ul style="list-style-type: none"> • Highlight roles in which individual can analyze data, find patterns, and organize ideas • Partners well with Activator talents, as Activator’s impatience will turn your analysis into action • When pitching a new idea or policy, lead with numbers and data; this will encourage Analyticals to get on board • Often values accuracy (getting it done right) over meeting a deadline; so as a deadline

		<ul style="list-style-type: none"> • Your mind is always working and producing analysis; don't forget to actually articulate and share that information with colleagues • Offer your assistance to others who may not be as logic-minded or organized to help them organize their data • Explain to others that your skepticism of their ideas is not about them personally, but about the data 	draws near, check in with them to make sure they have the necessary time to complete the task
Futuristic	Robin (5)	<ul style="list-style-type: none"> • "Wouldn't it be great if...?" is what you often think; a natural dreamer • Fascinated by the future and its potential; always inspired by "better" • Allow yourself the time to think about the future; the more vivid your ideas, the more persuasive you will be • Surround yourself with audiences who appreciate your views of the future and those who are excited to put it in motion • Try to describe your future vision in concrete action steps and detail to allow others to see it with you • Ensure that you can support your futuristic thinking with logic and data to ensure successful results • Help others by discussing the potential you see in them that they may not see themselves 	<ul style="list-style-type: none"> • Will find value in partnering with other Futuristics, as it will foster a discussion about the future and how to make it a reality • Also partners well with Activator talents, who serve to remind them that the future doesn't just happen, you create it • Seek input regarding future planning for the organization
Intellecion	Makala (5) Rachel Enmen (3) Crystal (5) Jennifer (4) Randy (5)	<ul style="list-style-type: none"> • Likes to think and exercise brain power • Is introspective and enjoys time alone to think things over and muse • May be misconstrued as aloof or disengaged; explain that it is simply your thinking style • Enjoy debate and prodding others to discuss their ideas • Schedule time for thinking; it will energize you and allow you time to 	<ul style="list-style-type: none"> • Get Intellecion involved in the beginning planning stages of a project rather than at the tail end; otherwise their insights may come too late • Open to challenging discussion or beliefs; likely won't take offense to it • Succeeds in tasks where thinking, reading, and writing are involved

		reflect; also take time to write as it ay help to collect your thoughts	
Harmony	Patrick (1) Christina (5) Meagen (5) Tonya (5) Nick (3) Stacy (1) Lori K (3) Julie (1) Jessica (3) David M (3) Randy (4)	<ul style="list-style-type: none"> Looks for areas of agreement; avoids conflict and friction; seeks to find common ground; Emphasizes keeping the peace Believes everyone would be more productive if kept own opinions in check and looked for consensus and support Practice techniques for resolving conflict without confrontation, otherwise, may have tendency to run away from conflicts and leave them unresolved Be aware that desire for harmony can sometimes cause disharmony among other strengths; balance between listening and efficiency is the key to this skill 	<ul style="list-style-type: none"> Avoid roles that will require Harmony to confront people on a daily basis Focus conversations on practical matters with clear action Skilled at unlocking people who are locked in disagreement to find a common ground between them Partners well with Command and Activator; they can help solve problems that need solved
Individualization	Michelle (1) Linda (1) Carter (2)	<ul style="list-style-type: none"> Intrigued by the unique qualities of each person; doesn't agree with generalizations or "types" of people Moves easily among different groups of people and audiences; intuitively personalize your interactions Keen observer of individual's motivations, style, and thinking style Has desire to draw out the best in people and build productive teams Can be misconstrued as "having favorites" or being unfair; explain how it is appropriate, just, and effective to treat people differently Articulate to others what you believe their individual strengths are to help them understand their role on your team 	<ul style="list-style-type: none"> Skilled at building teams that work well together Consult with Individualization if you need help understanding a particular person's wants, needs, or motivations (or even your own) Will succeed at leading diversity and community efforts because of ability to comfortably move among a broad range of styles and cultures
Competition	Chris (4)	<ul style="list-style-type: none"> Is motivated by the desire to outperform others; enjoys contests because they must produce a winner 	<ul style="list-style-type: none"> Use competitive language with Competition (win, lose, achieve, score)

		<ul style="list-style-type: none"> • Doesn't compete to compete; competes to win • Try to turn ordinary tasks into competitive games; it will increase your productivity • When you win, take the time to investigate why you won, as you will learn the most about yourself after a victory • Explain to others that being competitive doesn't equate with putting them down, but a way for you to derive satisfaction from pitting yourself against good competitors • Develop mental strategies to help you cope with a loss to allow you to move on to the next challenge quickly 	<ul style="list-style-type: none"> • Avoid putting Competitors in roles in which they are likely to consistently fall short or lose; winning matters to them • Give Competition time to mourn their losses • Enjoys the company of other Competitors; pairing Competition with a high level role model who also has Competition will help push potential • Enjoys roles/tasks where achievements can be measured
Ideation	Josh H. (4)	<ul style="list-style-type: none"> • Often labeled creative, original, conceptual, and smart • Fascinated by ideas and by finding connections between events and circumstances that make sense or "fit" • Make sure to finish your thoughts and ideas before communicating them, as others may not be as well-equipped to "connect the dots" as you have • Learn to edit your ideas and separate them into those that are practical and those that are not • Figure out where and when you produce your best ideas and recreate them • Schedule time to read and think, as those are your fuel • Help others follow your train of thought by making your ideas and suggestions more concrete and detailed 	<ul style="list-style-type: none"> • May tend to get bored quickly unless presented with new challenges • Partners well with Analytical because they will question and challenge you, causing you to strengthen your ideas • Encourage ongoing studies and trainings for Ideation to continue gathering knowledge • Bounce new ideas you may have off of Ideation as it will prompt their natural thinking abilities and may garner additional insight
Maximizer	Carri (1) Dave B. (2) Josh VanDyke (5) Jessica (4)	<ul style="list-style-type: none"> • Excellence, not average, is your measure • Fascinated by people's strengths; feel compelled to nurture it and stretch it towards excellence 	<ul style="list-style-type: none"> • Excels in roles in which they help people succeed (coaching, mentoring, managing, teaching) • But, do better taking something that works and making it great rather than taking

	Carter (3)	<ul style="list-style-type: none"> • Prefers to spend time with people who appreciate your particular strengths and those who are aware of their particular strengths • Tend to avoid those who want to “fix” you; don’t want to focus on what you lack, want to capitalize on what you already have • Once you have identified your own strengths, stay focused on them; refine them, improve them, practice them • Explain to others that you are not complacent with your weaknesses, but that you find it more productive to spend time improving your strengths • Seek out partners who can help with tasks that you know involve your weaknesses 	<p>something that is broken and making it average</p> <ul style="list-style-type: none"> • Can help you identify best practices in the workplace • Partners well with Restorative, as they will help problem solve when a particular project has drained your energy and enthusiasm • Maximizer philosophy goes against conventional wisdom of focusing on what is broken and fixing it; instead, ask Maximizers to identify what is working and make it better • Will become frustrated and discouraged if you spend too much time focused on their shortcomings rather than their strengths
Significance		<ul style="list-style-type: none"> • Gets value from being recognized, heard, and known to others • When game is on the line, you want the ball • Desires to be seen as credible, professional, and successful; you also seek relationships with those who hold similar traits • Will continue to be pulled from the mediocre toward the exceptional; always reaching • Reputation is important • Focus on maintaining a narrow “say-do” gap; you prefer to set big goals, but must make sure to follow through with actual performance to maintain credibility • Note that you may have a tendency to fear failure; don’t let this fear prevent you from staking claims to excellence 	<ul style="list-style-type: none"> • Make sure to articulate your appreciation for those with Significance, as your recognition of their work will go a long way • Prefers leeway to accomplish tasks independently • Encourage those with Significance to engage in extra tasks that will heighten their reputation or recognition such as writing an article, taking the lead in a workgroup, becoming a trainer/facilitator • Performs best when performance is visible rather than behind the scenes • Will thrive off of leading crucial teams and/or significant projects; motivation often comes when stakes are highest
Input	Carri (5) Greg (4)	<ul style="list-style-type: none"> • Inquisitive; enjoys collecting and keeping things, whether words, facts, quotes, or tangible items 	<ul style="list-style-type: none"> • Will excel in roles in which they are charged with acquiring new information daily

	Jen (5) Robin (4) Rachel Enmen (1) Crystal (2)	<ul style="list-style-type: none"> • Has open and absorbent mind; “mind like a sponge” • Finds many things interesting; values complexity and variety • Devise a system for storing and easily locating information for easy reference • Determine how best to turn the information you have into action so as to become more than just a “repository” of information • Make sure to share the information you possess with others; balance your “input” with “output”; let your friends know that you enjoy answering their questions 	<ul style="list-style-type: none"> • Partners well with Focus and Discipline, as they will help you stay on track when inquisitiveness may be distracting • Encourage Input to seek more information in areas of specialization that they are interested in • In meetings, ask Input for information and present opportunity for them to leverage their knowledge
Arranger		<ul style="list-style-type: none"> • Chaos conductor; definition of effective flexibility • Always on the look out for finding a better way • Often asked “How can you keep so many things in your head at once?” • Enjoy managing all of the variables of complex situations; sorting them out until you have discovered the most productive configuration possible • Your mental juggling is instinctive but may be hard for others to understand; explain yourself and your process to help them 	<ul style="list-style-type: none"> • Arrangers often do not recognize this strength in themselves, believing they are just “trying to figure out the best way to get things done” • Will succeed in complex, dynamic environments with few routines • Include Arrangers in teams and workgroups as they recognize other’s talents and skills and have insight as to how different people will work together • Consult with Arrangers if you need input as to how to improve workflow or rearranging spaces or processes to maximize efficiency
Learner	Carri (4) Jen (4) Nick (4) Robin (1) Rachel Enmen (5) Josh H (5) Crystal (4) Jennifer (2)	<ul style="list-style-type: none"> • Loves to learn; enjoys the process of learning rather than the content or result the most • Not threatened by unfamiliar information • Discover how you learn best; is it through teaching? Quiet reflection? Reading? • Loses all sense of time when in the middle of learning something new; attention intensifies when you “follow the trail”; allow yourself this time as it leads to productivity 	<ul style="list-style-type: none"> • Learners don’t necessarily want to become subject matter experts; it is the process of learning, especially on short term assignments that energizes them • Enjoys the challenge of keeping up with new technologies, rules, and regulations • Encourage them to engage in new trainings, classes, and programs whenever possible • Will do best in a dynamic work environment where they are tasked with learning about new subject matter in short period of time and then allowed to move on to the next new thing

		<ul style="list-style-type: none"> • Develop ways to track the progress of your learning and celebrate your achievements • Be catalyst for change; others may be intimidated by new rules or skills, but your willingness to soak up this newness can calm their fears • Honor and respect your desire to learn; take on learning opportunities and new skills whenever possible 	
Includer	Julie (2) Bev (1) Meagen (3) Lori K (5) Lori H (3) Jen (1)	<ul style="list-style-type: none"> • Consider roles in which you can take responsibility for representing voice that are not usually heard. • Look for opportunities to bring together people of diverse cultures and backgrounds. • Help those who are new to an organization or group get to know other people. • An anti-elitist, you may clash with those who feel they have earned the right to perks and power. • Acknowledge the dissonance you feel when you must be the bearer of bad news. • Chose roles in which you are continuously working and interacting with people. • Realize that people will relate to each other through you. • Explain what we all have in common. 	<ul style="list-style-type: none"> • When you have group functions, ask people with Includer to help ensure that everyone is included. They will work hard to make sure no individual is overlooked. • Ask people with Includer to help you think about potential customers, markets, or opportunities you are not reaching today. • If you are not a “natural” in social settings, stay close to people who have Includer. They will make sure you are a part of the conversation.
Context	Patrick (5) Christina (4) Greg (1) Carter (1)	<ul style="list-style-type: none"> • Before planning begins on a project, encourage the people involved to study past projects. • If you are in a role that requires teaching others, build you lessons around case studies. • Partner with someone with strong Futuristic or Strategic talents. • Accept change. 	<ul style="list-style-type: none"> • During meetings, always turn to people with Context to review what’s been down and what’s been learned. • People with Context think in terms of case studies: “When did we face a similar situation? What did we do? What happened?” • When you introduce new colleagues to people with Context, ask them to talk about their backgrounds before you get down to business.

		<ul style="list-style-type: none"> • Use fat-based comparisons to prior successes to paint a vivid picture for other of “what can be” in the future. • You recognize the best predictor of future behavior is past behavior. • Compare historical antecedents and situations to your current challenges. • Seek out mentors who have a sense of history. 	
Connectedness	Rachel Enmen (4) Jen (3) David M. (1) Linda (2)	<ul style="list-style-type: none"> • Consider roles in which you listen and counsel. • Within your organization, help your colleagues understand how their efforts fit in the larger picture. • You are aware of boundaries and borders created within organizations and communities, but you treat them as seamless and fluid. • Help people see the connections among their talents, their actions, their mission, and their successes. • Partner with someone with strong Communication talents. • Your philosophy of life compels you to move beyond your own self-interests and the interests of your immediate constituency and sphere of influence. • Seek out global or cross-cultural responsibilities that capitalize on your understanding of the commonalities inherent in humanity. • Connectedness talents can help you look past someone’s outer shell to embrace their humanity. 	<ul style="list-style-type: none"> • People with Connectedness will likely have social issues that they will defend strongly. • Encourage people with Connectedness to build bridges to the different groups in your organization. • If you also have dominant Connectedness talents, share articles, writings, and experiences with people who have Connectedness. You can reinforce each other’s focus.
Self-Assurance	Noel (3) Chris (3)	<ul style="list-style-type: none"> • Look for start-up situations for which no rulebook exists. • Seek role sin which you convince people to see your point of view. • Let your self-confidence show. It can be contagious. • Realize that sometimes you will find it hard to put your certainty or intuition 	<ul style="list-style-type: none"> • If you are working on a team with people who have self-assurance, give them leeway in making decisions. They will neither want or require hand holding. • Help people with self-assurance understand that their decisions and actions do product outcomes.

		<p>into words, possibly leading others to see you as self-righteous.</p> <ul style="list-style-type: none"> • Your independent streak can leave you standing alone. If this happens, make sure you are out in front or partner with someone who can help other see how they can benefit from following you. • Partner with someone with strong Strategic, Deliberative, or Futuristic talents. • Your exceptionally hard work and long hours are natural products of the passion and confidence you feel about your work. Don't assume that others are similarly wired. • Set ambitious goals. • You do not have a great need for direction and support from others. This could make you particularly effective in situations that require independent thinking and action. 	<ul style="list-style-type: none"> • Although the self-confident that people with Self-Assurance have can often prove useful, if they overclaim or make some major misjudgment, be sure to point it out immediately. They need clear feedback to inform their instincts.
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The purpose of this memo is to demonstrate alignment of the Fairfield County Auditor's Office strategic plan with the countywide 2022 strategic report.

County Auditor Mission – Aligned with the County Mission

The Auditor's Office mission is aligned with the overall mission of the county. We work to ensure high quality services, with outstanding customer service at an exceptional value to taxpayers. We foster economic and fiscal sustainability and enhance the county's reputation as a high performing, learning, and caring organization.

The mission of the County Auditor's Office is to perform statutory duties of the County Auditor with excellence, integrity, and innovation while embracing outstanding internal and external customer service to continuously improve county government. This mission was affirmed during the January 2022 retreat of the County Auditor's Office. We serve.connect.protect as part of Fairfield County's identity, and our brand is excellence.

Strategic Themes of the County Auditor's Strategic Plan

Following a detailed analysis of strengths, weaknesses, opportunities, and threats, five strategic themes for the County Auditor's Office emerged. The strategic themes are:

1. Provide Supervisory Support & Coaching Opportunities for Team Members
2. Update Financial and REA Processes to Add Value
3. Focus on Strengths & Customer Service
4. Improve Communication and Outreach
5. Improve Use of Technology and Records Management Processes

The County Auditor's Strategic Plan is found here:

<https://www.co.fairfield.oh.us/auditor/Strategic-Plan.html>

Each functional area of the County Auditor's Office has developed specific action steps for how they will serve, connect, and protect with excellence within these strategic themes. To date, there are *90 activities* outlined. The plan is a living document with updates made regularly and posted online.

Summary of County Auditor Strategic Activities

- The strategic activities include activities you have heard about in public meetings, including *reorganizational and employee coaching and mentoring activities*, implementation of *new technology*, and focusing on *internal and external customer service*.

- Main goals are related to *new technology*, such as the conversion to software as a service for financial systems, the creation of a hotel/motel lodging tax collection system, GIS support of the 911 system, and the use of technology for the conveyance of property.
- There are procedural and compliance related *updates* for the triennial valuation of real property, the Budget Commission, Board of Revision, and standards for the conveyance of property.
- There are *strategic communication activities* to improve civic education and outreach, including the creation of fact sheets, videos, and website tutorials.

Alignment with the County Strategic Report

Within the county-wide strategic report, there are six improvement goals for:

1. infrastructure,
2. social services,
3. housing,
4. workforce development,
5. economic development, and
6. county operations.

There are four county roles identified in the strategic report: convener, funder, leader, and advocate.

For each of the 90 activities identified in the County Auditor's strategic plan (as of April 2022), County Auditor leadership will be contributing to improvement in county operations, which is the 6th goal - optimizing county operations to meet emerging needs of Fairfield County employees and residents. For these activities, the County Auditor is a convener, funder, leader, and advocate.

For goals 1-5 of strategic report, the County Auditor serves as a convener, funder, or advocate in direct and indirect ways.

A stable organization with high-performance leadership will result in support of *government and stakeholder groups* that are charged with funding, convening, or leading infrastructure, social service, housing, workforce development, or economic development activities. In this way, all of the 90 activities of the County Auditor's strategic plan are aligned with the first 5 goals of the strategic report. There are additional ways in which the strategic activities are aligned.

Examples of Strategic Activities Tied to Goals 1-5 of the Strategic Report

- Using technology to update the hotel/motel lodging tax collection process directly supports economic growth through effective planning, promotion, and development. Key tourism stakeholders will have additional resources with the new process. The County Auditor is leading and convening groups for the new technology and is advocating for the process with strategic communication.
- The County Auditor funds, convenes, advocates for, and leads county wide GIS activities. Use of GIS directly supports all goals of the strategic report. There are obvious connections to infrastructure, but there are other connections, too. GIS leads the census activities which is critical for funding of social services, housing, workforce development, and economic growth. GIS also supports county operations, such as operations of the Board of Elections and County Engineer, and stakeholder operations, such as operations of the Hunters Run Conservancy District and Soil and Water Conservation District.
- The County Auditor funds, convenes, advocates for, and leads county wide agricultural support activities which is directly related to economic development. Farmland devoted to commercial agriculture may be valued according to its current use rather than at its "highest and best" potential use. This provision of Ohio law is known as the Current Agricultural Use Value (CAUV) program. By permitting taxation at the parcels "value in use", CAUV normally results in a lower tax bill for working farmers. In Fairfield County, agriculture is a significant part of the economy. More than 2,400 applicants participate in the CAUV program. There is a strategic activity of intentionally reaching out to applicants to help with the process for participating in the program and for renewing participation.
- Reorganizing pay-in processes for ADAMH and DD - and - coordinating reporting of Safe at Home compliance are two activities that support social service goals. The Happiness Project (which allows for multiple volunteer activities) is connected to social services goals, as well.
- Increasing knowledge about school board levies is an activity that supports workforce development goals and positive advocacy for school funding.
- There is also a new position under development for a weights and measures in-training position, allowing for an additional professional position that does not require a college degree but does require technical skills. This type of workforce development is often discussed with the Workforce Center.

- Improving transparency with the Tax Incentive Review Council and using new electronic processes are activities aligned with economic development goals because they improve civic education and services, respectively.
- Developing payroll trainers and improving financial systems lift up key departments who are charged with funding, convening, or leading infrastructure, social service, housing, or workforce development activities.
- Improving the understanding of real estate assessment processes and Board of Revision appeal processes supports the overall goal for affordable housing and helps to facilitate economic growth.
- Updating minimum standards for the conveyance of property supports infrastructure and housing goals.
- For all 6 goals in the strategic report, there are advocate role possibilities, given connections with the Speakers' Bureau, townships, cities, villages, and schools. In the first quarter of 2022, there have been multiple presentations about the strategic plan and its alignment with the strategic report. Engaged employees and leaders are advocates for the goals.

The purpose of this memo was to demonstrate alignment of the Fairfield County Auditor's Office strategic plan with the countywide 2022 strategic report. Direct alignment is found with the goal to improve county operations. Supportive and direct alignment is found in the other goals of the strategic report.

The analysis within the memorandum was helpful to staff in improving understanding of the 90 strategic activities and their alignment to the strategic report.