



FAIRFIELD  
COUNTY • OHIO  
AUDITOR

2022-2024

STRATEGIC PLAN





## 2022-2024 STRATEGIC PLAN STRATEGIC THEMES

**Provide Supervisory Support**  
& COACHING OPPORTUNITIES FOR TEAM MEMBERS



UPDATE FINANCIAL AND REA PROCESSES TO  
**Add Value**

FOCUS ON STRENGTHS AND  
**Customer Service**



**Improve Communication**  
AND OUTREACH

**Improve Use of Technology**  
AND RECORDS MANAGEMENT PROCESSES





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1

## **Table of Contents**

<i>Introduction</i>	2
<i>What is Strategic Planning?</i>	2
<i>Mission</i>	2
<i>Values</i>	3
<i>Strengths, Weaknesses, Opportunities, and Threats</i>	4
<i>Strategic Themes</i>	8
<i>Team Purpose Statements</i>	19
<i>Exhibits</i>	21



## **Introduction to the Strategic Plan for Fairfield County, 2022-2026**

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 strategic planning process 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 2023 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 in 2023 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. For example, there are standards for customer services responses.

### ***SWOT Analysis for Insight to a Strategic Plan***

Prior to the 2022 and 2023 retreats, employees participated in a SWOT analysis. The analysis is an ongoing effort. 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.

<b><i>SWOT Factors</i></b>	<b><i>Positive</i></b>	<b><i>Negative</i></b>
<b>Internal</b>	Strengths	Weaknesses
<b>External</b>	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 31 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.

<b><i>Summary of SWOT Analysis</i></b>	
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• County partnership</li> <li>• Communication across departmental lines</li> <li>• Strong</li> <li>• Consistency in partnership</li> <li>• Dedicated leadership</li> <li>• Passionate team members</li> <li>• Purpose</li> <li>• Connections with county human infrastructure</li> <li>• Structure allows for ability to tackle problems with multiple partners</li> <li>• Employees who want to make a difference</li> <li>• Outcomes of work are positive, visible, and measurable</li> <li>• Positive relationships with other sectors and multiple entities</li> <li>• Good reputation - with results</li> <li>• Successful audits</li> <li>• GIS technology</li> <li>• Physical space is exceptional</li> <li>• Employees have knowledge of processes and requirements</li> <li>• Leadership</li> <li>• Technical competencies</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Services are not as well known in the community as they could be</li> <li>• Technology &amp; processes need improved in an ongoing way</li> <li>• Telecommunications are outdated</li> <li>• Payroll system is burdensome but improving</li> <li>• Financial officers are ready for additional training and understanding – some departments need support more than others</li> <li>• Formal processes can be improved</li> <li>• Employees feel an increasing amount of stress</li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>• Potential to engage other entities in strategic reviews</li> <li>• Growing county</li> <li>• Relatively stable economy; stable financial position of the county</li> <li>• Review of processes will allow for improvements</li> <li>• Improvements in communications</li> <li>• Additional training - internally and externally</li> <li>• Solidifying new table of organization</li> <li>• New transparency initiatives</li> <li>• Exploration of an Ohio Chapter of IAAO</li> <li>• Communication of BOR processes, based on new legislation</li> </ul>	<ul style="list-style-type: none"> <li>• Uncertainty in the economy, especially mid-long term, relatively high interest rates</li> <li>• Increasing costs and supply chain disruptions</li> <li>• Market volatility in terms of real estate markets</li> <li>• Cybersecurity threats</li> <li>• Public misinformation and misunderstandings, particularly about BOR or appraisal processes (viewed as an ongoing threat from multiple sources)</li> <li>• Public discontent about increases in valuations arising from market activity</li> <li>• Labor shortage (internal and external aspects)</li> </ul>

***Observations:***

***We want to continue to 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.

We have ***aligned position descriptions with priorities***. We will continue to provide training for leaders and for all employees, ***especially leadership training***.

***Succession planning is an ongoing process***. Recruitment, retention, and recognition activities are meaningful. Supervisors will continue to develop ***coaching and mentoring opportunities***.

We will continue to be ***available to elected officials*** and seek input and feedback about strategic efforts.

The ***next sexennial update is in 2025***; it will be based on market values using a sales analysis. It takes about two 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 of properties, or a demolition or damage to a property.



### ***Triennial Update***

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

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

#### ***For external communications, we have already:***

- Created fact sheets for countertops, mailings, newsletters, media releases
- Created video presentations for how the process works
- Added more information to the "postcards" about reappraisals
- ***Improved the use of social media***
- Conducted presentations for the Bar, Realtors, and Elected Officials
- Conducted a record number of informal reviews
- Engaged professional services for search engine optimization and social media marketing
- Created videos about how the values effect taxes that are assessed

#### ***For internal communications, we have already:***

- Focused on ***payroll coordination*** and improvements unique for each department
- Increased ***integration with departments***

We want to continue these efforts.

We affirmed the strategic themes. 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?

In addition, the team asked significant questions, together, recognizing the team is comprised of learners at all levels. Significant questions included:

- What can we do together to improve our organizational culture?
- How do we continue to live out our values?
- How do our discussions on ethical and inclusive leadership connect to your personal WHY?

It is expected that there will be ongoing updates to the action steps, with leaders and small groups developing goals. The team evaluates aspirations and outcomes or results on a weekly basis. The strategic themes evolving from the process were:

### ***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 and have been updated regularly, as well. There are regular updates during public meetings. The strategic plan is a working document that is posted on the County Auditor's website and within social media.

<b>STRATEGIC THEME</b> <b>Provide Supervisory Support &amp; Coaching Opportunities for Team</b>			
<b>CHAMPION:</b> Carri Brown			
<b>WORK GROUP MEMBERS:</b> Supervisors and Managers			
<b>TARGETED OUTCOMES:</b> 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.</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 the team members.</p> <p>Evaluations have been conducted, and there is a normal process for them to continue.</p>
Conduct ASAP/Safety Training	2023 and ongoing	Dave Burgei	Improved safety and readiness – training conducted for REA.
Provide NACo High-Performance Leadership training opportunities for all employees.	By the end of 2022, all employees will have taken the training.	Carri Brown	Leadership is at all levels of the organization. Participants have reported positive benefits. All of staff have certificates. New employees will have opportunities for training.
One-on-one meetings & coaching/combined with “stay” interviews/an all-staff survey.	Throughout 2023	Carri Brown	Employees have opportunities for one-on-one times with the Auditor. The second annual all staff survey was conducted in October 2022.

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
**Updated Regularly; Last Updated July 17, 2023**

Conduct weekly "touch base" meetings with all staff.	Meetings will be held on Mondays to be in contact and set priorities.	Carri Brown	The Monday Morning Meetings have been held weekly since the end of October 2021. Employees have commented that they appreciate the transparency. 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. The 2023 retreat was conducted – and the strategic plan was updated.
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.
Develop a book club for employees	Pilot in 2022; implement in 2023	All Team Supervisors or Volunteers	Five books have been reviewed. An additional book was added in March 2023.
Prepare in-services to provide information about topics of interest to the team members.  Conduct technical training due to promotions and new staff.	Mid-2022 forward – through 2026	Carri Brown and Directors/Supervisors	Mental health first aid training was conducted in March 2023. A list of available training was provided. Four in-services and stress relief activities are scheduled for 2023. Technical training is underway.
Plan for at least one day a week as remote work to be prepared for requirements to do so and to improve productivity and flexibility	2024	Directors and Carri	Announcement for framework made on 5.22.2023
Complete at least two activities for individual recognition and two activities for team building; Continue GEM program at the departmental level.	2022-2026	Carri Brown, Rachel Elsea and Stacy Knight	Recognition is in place (GEMS, certificates & NACo graduation); 4+ lunches were scheduled. "Living our Values" traveling trophy was added. Team participated in Fair grand opening and volunteer activities. In-services are in scheduled.
<b>COMMENTS</b> The above task list is not inclusive of all activities.			

<b>STRATEGIC THEME</b>			
<b>Update Processes to Add Value</b>			
<b>CHAMPIONS:</b> Directors and Josh Harper			
<b>WORK GROUP MEMBERS:</b> All team members with subgroups defined by function			
<b>TARGETED OUTCOMES:</b> 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	2023 and ongoing	Jen Dickerson, Michelle Wright	Improved knowledge of payroll process; training with key departments, such as the Sheriff, was conducted. SaaS conversion plans were implemented. Integrated training was held.
Create Drop in Option for Payroll; develop intentional departmental outreach for Financial Systems	January 2023 and ongoing	Jen Dickerson, and Michelle Wright	Improved internal customer service for payroll officers; improved outreach for internal customers; communication about vacation balances was made.
Document Payroll procedures & Hold vendor accountable for services	2022 and ongoing	Jen Dickerson and Directors	Payroll cycles in compliance with no errors, training of staff is in progress. Tyler deliverables are being documented. Vendor credits were received.
Examine Payroll processes for improvement using a kaizen type approach	2023 and ongoing	Tonya Wright, Christina Wetzel, and Jennifer Harmon	Increased efficiency and coordination with departments; ongoing tips have been provided to 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 onboarding	2023	Jen Dickerson and Michelle Wright	Improved relationship with HR; improved internal services; improved employee experience; training held on March 8, 2023
Continue to develop new BOR Administrator; define roles for BOR	2023	Dave Burgei & staff	Transfer of knowledge; refined processes; documented communication and online access
Continue to develop a Financial Systems Work Group; include training about GASB 87 and internal control	2023	Angel Horn	Improved Organizational Knowledge; improved internal control; new manual was introduced for 1.1.2023
Review transparency modules (checkbook) for return on investment	2024	Angel Horn	Potential Improved access to financial data; as of March, we are current with existing process

<b>STRATEGIC THEME</b> <b>Update Processes to Add Value - Continued</b>			
<b>CHAMPION: Directors and Josh Harper</b> <b>WORK GROUP MEMBERS: All team members with subgroups defined by function</b>			
<b>TARGETED OUTCOMES: Exceptional public service; improved accountability; effective processes; brand of excellence</b>			
<b>Action Step(s)</b>	<b>Task Completion / Review Date</b>	<b>Assigned To</b>	<b>Results</b>
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. Outreach at the fair was conducted in 2022.
Debrief from 1000 informal hearings for REA, examine process for improvement; included were personal meetings with virtual, phone, and in -person options.	2023	Dave Burgei and Josh Harper	Better public understanding of appraisal process; using more technology. Connected with Pickerington library for support with civic education and services. Surveys show exceptional service.
Review appraisal communications and make edits if needed; create website updates; update BOR data online every 24 hours in 2023; review process for appraising low-income housing consistent with HB 45	2023 - 2024	Dave Burgei, Crystal Walker, Makala Finley, Noel Sodders, & Josh Harper	Improved knowledge about process for the public and stakeholders – in place for the first quarter of 2023, updated daily; HB 45 under review for 2024
Continue waiver of requirement for formal hearings with the Budget Commission; align estimates of revenues with Commission long-term planning tool	2023	Carri Brown, Angel Horn	Increased efficiency; waived 2.2022; new process piloted with success in April 2022; revenue estimates are aligned
Continue to update the Hotel/Motel lodging procedures using technology	2023	Angel Horn and team	Improved public knowledge; improved process and funding for tourism related agencies; fact sheets were in place by February 2022; AI services are working
Support 911 technology updates	2023	Nick Dilley	Improved safety services; good partnership with the Sheriff
Create a fact sheet for the HRCD changes from a County Auditor perspective, to help answer questions about special assessments	2023	Rachel Elsea	Improved awareness of special assessment processes
Prepare documentation and training for fuel card, credit card, and vendor card policy	2023	Rachel Elsea and David Burgei	Improved internal control; documented procedures
Participate in solar work group with SWCD and others	2022-2024	Carri Brown and Nick Dilley	Improved organizational knowledge; March map of the month created



**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
**Updated Regularly; Last Updated July 17, 2023**

Improve the creation of the federal schedule; ensure all financial reporting deadlines within the Hinkle System and with GFOA are met	2024	Angel Horn and Christina Wetzel	Increased accuracy in financial auditing process; improved support for departments
Participate in stormwater utility work group	2023-2024	Carri Brown, Dave Burgei, and Nick Dilley & team members	Policy recommendation for improved public service; Connecting with County Engineer who will lead the group
Document all procedures and improve manuals, for each position (DMD conversion completed)	2025	Directors	Improved job knowledge and ability to sustain operations
Develop the GIS team; create a map of the month each month; conduct a GIS Day on November 15	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; considering a map of the year
Monitoring of Financial Systems contracts	2023 -2024	Angel Horn, Jen Dickerson, and Linda O'Toole	Improved control and quality; creation of monitoring spreadsheet
Monitoring of REA related contracts	2023 - 2024	Dave Burgei	Improved control and quality assurance; creation of monitoring spreadsheet
Tracking workload and outcome measures	2023 - 2026	All Teams	Improved knowledge of who to contact for what purpose and what the work means for the public; clarity of priorities
Organize tax pay-ins to support ADAMH and DD with more efficiency; organize estimated revenue adjustments	2022 and ongoing	Bev Anders	Accomplished by April 2022 – review for adjustments
Improve timeliness of 2% reimbursement of internal service costs	2023 and ongoing	Angel Horn and Team	Accomplished by April 2022; process is now up to date and should be monitored
Ensure ongoing reconciliation of fiduciary funds	2023 and annually	Angel Horn and Jen Dickerson	Improved financial reporting
Participate in statewide discussions about legislation and other topics of interest	2023	Carri Brown	Prepared Q/A for CAAO brochure; reached out to legislators; attended legislative events
Issue a request for proposals for sexennial update; let contract	2023	Dave Burgei	Quality preparations for required update of values; bid opening is planned March 2023
Establish a formal process for a change of address for REA	2023	Josh Harper	Improve public service and understanding using technology – Completed in 2023.
Improve upon the Excellence Project, with certificates and additional recognition	2022	Carri Brown and Managers	Every moment is an opportunity to show excellence – cited examples; created a traveling trophy
<b>COMMENTS</b> The above task list in not inclusive of all activities.			

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
**Updated Regularly; Last Updated July 17, 2023**

<b>STRATEGIC THEME</b>			
<b>Focus on Strengths &amp; Customer Service</b>			
<b>CHAMPION: Dave Burgei and Rachel Elsea</b>			
<b>WORK GROUP MEMBERS: Managers</b>			
<b>TARGETED OUTCOMES: Brand of excellence in public service</b>			
<b>Action Step(s)</b>	<b>Task Completion / Review Date</b>	<b>Assigned To</b>	<b>Results</b>
Communicate individual strengths focus; conduct assessment to identify individual strengths and compile helpful notes for supervisors and employees	January 2023 and ongoing	Carri Brown	Positive communication about strengths; team cohesiveness and increased organizational commitment and individual job satisfaction; updated in January 2023
Performance assessment training and developing ways to maximize the individual and team strengths; schedule mid-term evaluations and vacation balance check-ins	2023 and ongoing	Carri Brown	Improved understanding of evaluation process; response to employee and manager requests; mid-year evaluations are scheduled and conducted; balance monitoring is in place
Reinforce customer service standards/ report annually on statistics	January 2023 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	January 2023	Carri Brown	Collective understanding of customer service expectations
Encourage use of Bravos and GEMS	January 2023 and ongoing	All Team Members	Shared appreciation for team members; traveling trophy added for team recognition; departmental GEMs are in place
Note positive examples of customer service weekly s "wins"	Monday Morning meetings	All Team Members	Improved understanding of and commitment to internal and external customer service
Develop an office wide calendar	For 2023	Rachel Elsea	Improved planning - completed in January 2023
Review and document TIRC processes, conduct cross training and help entities establish schedules; open meeting documentation	2023-2024	Rachel Elsea	Increased connections with economic development; transparency of multi-jurisdictional activity; website updated; open meeting procedure updated as of 9.2022
Develop job shadowing for team members as requested	2023-2026	All Team Members	Improved organizational knowledge and team cohesiveness; improved ability to cover for planned absences

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
**Updated Regularly; Last Updated July 17, 2023**

Develop teeny tiny trainings – include new procedures for bidding requirements	2023-2024	Michelle Wright and team; Angel Horn and team	Improved organizational knowledge; short trainings are available to help with departments; examples conducted in March 2023
Adjust inventory assignments to a month selected by the county departments	2023	Angel Horn	Better time management and support of financial officers; survey was completed in 2022
Update the Internal Control Manual; update capitalization threshold to \$10K; create new manual for settlements	2023	Carri Brown, Rachel Elsea, and Angel Horn	Improved organizational knowledge and internal control; completed in 2023 – ongoing tips provided
Update the Continuity of Operations Plan for Financial Systems and Real Estate Assessment; Update ASAP plans as needed	2023 and ongoing	David Burgei and Rachel Elsea	Improved service and ability to respond to emergencies
Meet deadlines for sexennial update planning	2023 - 2025	David Burgei and Josh Harper	Monthly meetings to show the process is on track
Participate in county-wide work groups, such as environmental stewardship work group, and IT strategies work group, and others	2023 and ongoing	Jen Dickerson and Rachel Elsea	A list of work groups with participants is available and communicated each Monday
Continue Happiness Project	2023 and ongoing	Carri Brown, Bev Anders, and Stacy Knight	Happiness comes from making others happy. Design at least 2 ways to support those struggling with homelessness, recovery, or poverty; volunteered for recovery and Habitat for Humanity (on own time) in 2022; Volunteered for MOW & United Way; pizza parties with private money used to support United Way & Salvation Army; Christmas projects were implemented.
Focus on financial reporting strength to add value to Fairfield County by continuing MCJDC services with the costs of services recognized	2023 - 2024	Carri Brown	Best interest of Fairfield County is put forth; <i>significant savings to the county general fund</i> ; support of joint venture of four counties
Develop two-week onboarding process for newly hired employees, with templates	2023	Managers	Piloting with two new employees, working well
Clarify all public records and open meeting practices; take Sunshine Law training	2023 and ongoing	Carri Brown and Rachel Elsea & all team members	Policy clarified and posted as well as sent to media and placed online; training taken during Sunshine Week
<b>COMMENTS</b> 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.			

<b>STRATEGIC THEME</b>			
<b>Improve Communication and Outreach</b>			
<b>CHAMPION: Rachel Elsea</b>			
<b>WORK GROUP MEMBERS: All Managers</b>			
<b>TARGETED OUTCOMES: Improved civic education and outreach</b>			
<b>Action Step(s)</b>	<b>Task Completion / Review Date</b>	<b>Assigned To</b>	<b>Results</b>
Create a newsletter and fact sheets; update website and intranet; build a stronger social media presence	2023	Rachel Elsea and team members	Improved civic education and outreach; social platforms were built by mid-2022; first newsletter was issued in August; multiple fact sheets were created
Develop a plan for speaking engagements (more than 30 were conducted in 2022 and 2023)	2023-2024	Rachel Elsea and Carri Brown	Improved civic education and outreach; conducted multiple presentations in 2022 & 2023; more than 30 engagements were in place in the 1st quarter of 2023.
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 completed – revise annually and add new videos	Rachel Elsea 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 online June of 2022
Attend at least one of each of the 13 township meetings throughout the period; issue communications to support entities	2023-2026	Carri, Rachel, and Managers	Additional outreach and communication; multiple communications have been made with townships
Attend at least one of each of the school board meetings	2023-2026	Carri, Rachel, and Managers	Additional outreach and communication
Attend at least one of each city/village council meetings	2023-2026	Carri, Rachel, and Managers	Additional outreach and communication
Refine the communications and social media strategy; participate in DEI work group and develop that lens for policies	2023-2026	Rachel Elsea and Managers	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	2023 - 2026	Josh Harper and Team	Improved organizational knowledge; attended educational meetings with local private appraisers

**Strategic Plan for the County Auditor's Office**  
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Refine team purpose statements and draft a new directory; distribute directory	2023 and ongoing	Rachel Elsea	Improved ability to communicate purpose added notary notations for accessibility
Prepare for Sunshine Week (annually)	February 2023 and annually	Rachel Elsea and team members	Improved civic education and outreach; three press releases were available for Sunshine Week in 2022; additional press releases and postings were issued
Offer Tech Cred and other trainings to all staff	2023 and annually	All Managers	Improved knowledge and compliance
Prepare at least 12 press releases or op-ed pieces annually on newsworthy topics	2023-2024	Rachel Elsea and Managers	Improved civic education and outreach; 22 releases, op-ed pieces, or press notices were issued as of the end of 2022
Focus on a specific communication strategy for reappraisal processes	2023 and ongoing	Rachel Elsea, Dave Burgei, Josh Harper	Improved civic education and outreach
Plan for awareness activities for 50+ accounting professionals in the county	2023 and annually	Carri Brown	Proclamation and activities are ready for 2023; planning Auditor breakfast in September for training
Plan awareness activities for appraisal professionals and real estate assessment	2023 and annually	Josh Harper and Carri Brown	Proclamation and activities are ready for 2023; include a topic for the September training
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
Conduct customer service surveys in connection with informal hearings and everyday service	2023 and ongoing	Rachel Elsea and managers	Tracking of service expectations, improvement in outreach with informal hearings
Purchase a new weights and measures vehicle	2023	Carter Corcoran	Improved safety of services
Honor weights and measures expertise and county businesses; create a listen and learn session about weights and measures	2023 and ongoing	Patrick Brighton, Carter Corcoran, and Rachel Elsea	Improved awareness of weights and measures; share information with the September training
Attend ADAMH and DD Board meetings and provide presentation about services	2023	Carri Brown and Rachel Elsea	Developing presentation like listen and learn presentations
Create an annual programmatic report and develop a video about services	2023 (report)/2024 (video) and ongoing	Rachel Elsea and Carri Brown	2022 report is a baseline
<b>COMMENTS</b> The above task list in not inclusive of all activities.			

<b>STRATEGIC THEME</b> <b>Improve Use of Technology and Records Processes</b>			
<b>CHAMPION: Dave Burgei and Rachel Elsea</b> <b>WORK GROUP MEMBERS: Managers</b>			
<b>TARGETED OUTCOMES: Improved use of technology and records processes</b>			
<b>Action Step(s)</b>	<b>Task Completion / Review Date</b>	<b>Assigned To</b>	<b>Results</b>
Participate in the Records Commission Meetings, review office procedures and stored records in September	2023 and ongoing	Rachel Elsea and Angel Horn	Proper records management; designation letters were signed, and meetings are being held
Ensure Cybersecurity training is taken by all team members; shared additional cybersecurity information and bulletins; implement 2 fact authentication process	End of 2023 and annually	Carri Brown and all team members	Improved cybersecurity measures and knowledge
Develop a GIS strategic plan for use of applications and internal/external services; include the effort for a Map of Month; conduct GIS Day training event	2023-2026	Nick Dilley	Improved access and use of GIS tools consistent with growth of the county
Review improvements of hotel/motel lodging tax collection process	2023 and ongoing	Settlements and Administration Team	Improved use of available technology; improved evaluation of collections
Take training and support the use of the new telecommunications systems; apply for tech cred grant and take technical courses	End of 2023 and annually as assigned	All Managers, Rachel Elsea	Improved telecommunications; awarded grant in 2023; new technical skills for 10+ employees
Focus on Tyler Technology related improvements and monitoring for Financial Systems	2023 and ongoing	Jen Dickerson & Managers	Improved use of available technology. Monitoring resulted in service credits in 2023.
Review websites for improvement and ADA compliance	By the end of 2023 and annually	Rachel Elsea	Improved access to online information
Support the Board of Elections, Hunters Run Conservancy District, SWCD, DD, and others by answering data requests; develop a data request process; create fact sheet for HRCD	2023 and ongoing	Nick Dilley & Carri Brown	Improved use of available technology
Implement new process for address changes; manager Tyler updates, such as with TIFs	2023- 2024	Josh Harper & Noel Soddors	More convenient public services; greater efficiency for staff
Develop a long-term list of technology and asset requirements for replacement	2023	Directors and Rachel Elsea	Better planning for budget requests



### ***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. The plan was provided to stakeholders in 2022 and in 2023, once updated. Ongoing updates at each roundtable meeting and at various other meetings were conducted. The themes will continue to be communicated with all employees and stakeholders.

An electronic survey was issued through the end of December. 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.

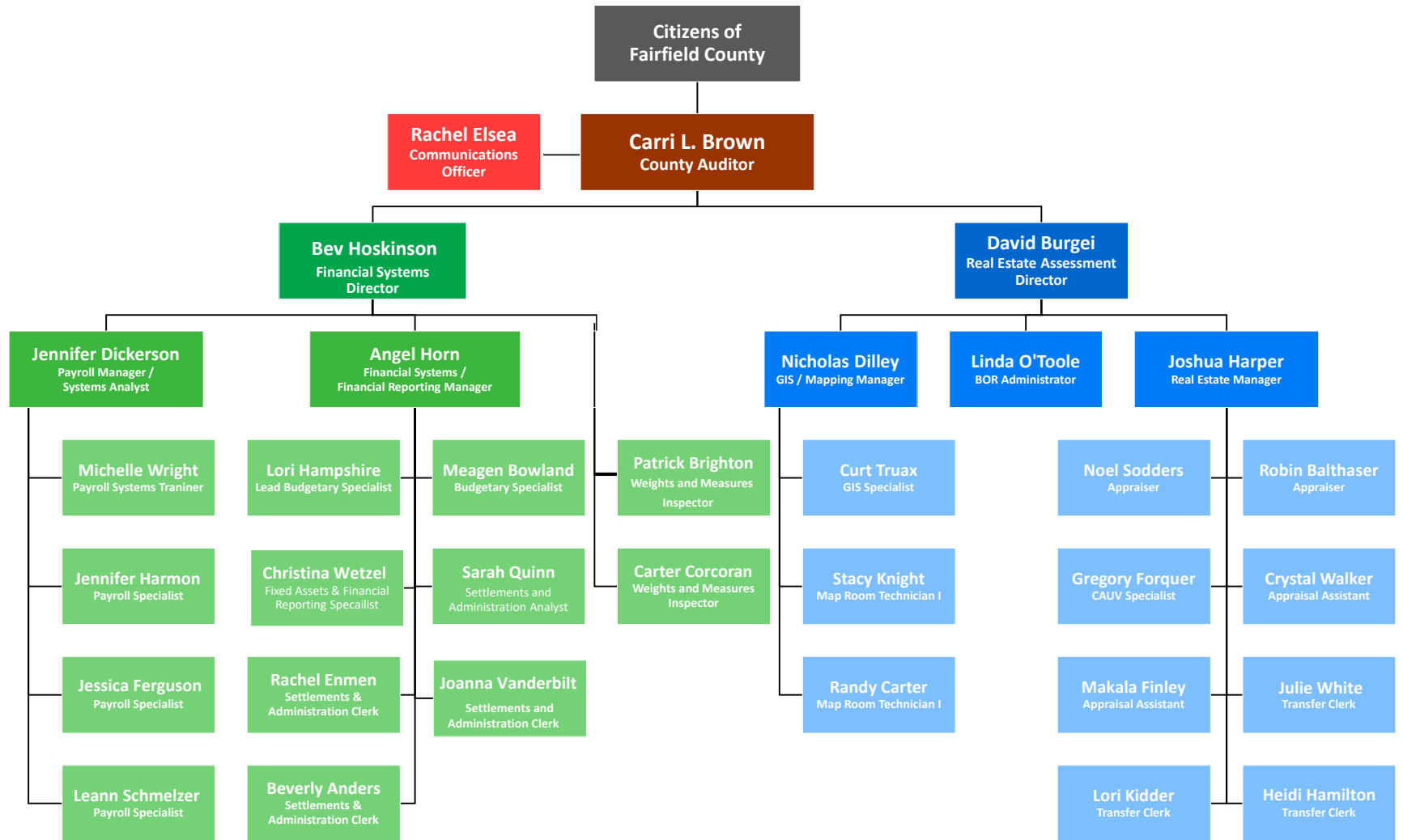
A strategic plan is document for guidance; it is a living document. Metrics will be reviewed throughout the plan period to help document progress. A “year in review” document was created in 2022.

An all-staff survey was conducted in October 2021 and October 2022. Various stress relief activities will be conducted in 2023.

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

***Exhibits***

- Table of Organization
- Narrative about the Team
- Individual Strengths
- Alignment with the Countywide Strategic Report
- Year in Review 2022



31.375 FTE on Auditor TO  
.10 FTE on Prosecutor TO  
32 positions when full  
0 vacancies

**For Auditor Use**  
39.48%: General Fund  
60.52%: REA Fund

# Your Fairfield County Auditor's Office: AT-A-GLANCE



**31.375**  
FULL-TIME  
EMPLOYEES



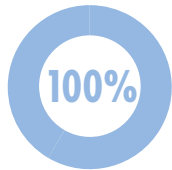
**33.875**  
2.5 full-time  
employees fewer  
than one year ago

**41.55%**  
of employee salaries  
are supported by the  
**General fund**

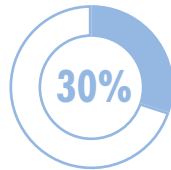


**55.45%**  
of salaries are supported  
by the **Real Estate  
Assessment fund**

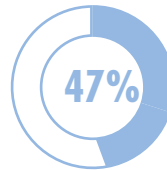
## COUNTY AUDITOR EMPLOYEES ARE **highly trained, skilled, and experienced.**



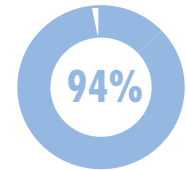
have obtained a  
**professional certification** or  
**association certificate**



have an **associate degree**  
or two-year certificate within a  
technical discipline



have a **bachelor's degree**  
or higher, which is above  
the state average of 29.7%



have at least **5 years** of  
governmental service

**Above national and state averages for education and experience**

## COUNTY AUDITOR EMPLOYEES ARE **highly-engaged in outreach and community efforts.**

### **Professional Organizations**

Employees are actively involved in a number of professional organizations, including: Association of Government Accountants, County Auditor Association of Ohio, Destination Downtown Lancaster, Government Finance Officers Association, International Association of Assessing Officers, Lancaster Special Improvement District, and Mid-Ohio Regional Planning Commission.



### **Civic Organizations**

Employees are school volunteers and coaches. Many are church volunteers and are involved in other civic groups.

Employees are active participants in:

- United Way
- Salvation Army
- Meals on Wheels
- Chamber of Commerce
- Rotary Clubs
- The Masons
- Moose Lodge
- Eagles
- Pink Hope Society
- Fairfield Medical Center TWIGs
- Lancaster Ohio Biker Club
- Charity Newsies

### **CONTACT US!**

740-652-7020 • [co.fairfield.oh.us/auditor](http://co.fairfield.oh.us/auditor) • [Facebook](https://www.facebook.com/FairCoAuditor) FairCoAuditor • [LinkedIn](https://www.linkedin.com/company/fairfield-county-auditor) FairfieldCountyAuditor • [Instagram](https://www.instagram.com/FairCoAuditor) FairCoAuditor • [fairfield-county-auditor](https://www.facebook.com/fairfield-county-auditor)

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



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

<b>Carri</b>	Maximizer, Strategic, Achiever, Learner, Input
<b>Bev Anders</b>	Includer, Developer, Consistency, Positivity, Responsibility
<b>Robin</b>	Learner, Achiever, Responsibility, Input, Futuristic
<b>Meagen</b>	Empathy, Consistency, Includer, Responsibility, Harmony
<b>Patrick</b>	Harmony, Adaptability, Relator, Positivity, Context
<b>Dave B.</b>	Deliberative, Maximizer, Discipline, Analytical, Consistency
<b>Jen</b>	Includer, Developer, Connectedness, Learner, Input
<b>Nick</b>	Responsibility, Deliberative, Harmony, Learner, Analytical
<b>Rachel Elsea</b>	Deliberative, Belief, Strategic, Relator, Responsibility
<b>Rachel Enmen</b>	Input, Empathy, Intellection, Connectedness, Learner
<b>Jessica</b>	Responsibility, Adaptability, Harmony, Maximizer, Relator
<b>Makala</b>	Achiever, Restorative, Developer, Empathy, Intellection
<b>Greg</b>	Context, Deliberative, Analytical, Input, Realtor
<b>Lori H.</b>	Responsibility, Consistency, Includer, Woo, Communication
<b>Josh H.</b>	Achiever, Relator, Belief, Ideation, Learner
<b>Angel</b>	Responsibility, Relator, Developer, Achiever, Positivity
<b>Lori K.</b>	Empathy, Positivity, Harmony, Developer, Includer
<b>Stacy</b>	Harmony, Empathy, Relator, Responsibility, Achiever
<b>Noel</b>	Achiever, Strategic, Self-Assurance, Communication, Woo
<b>Curtis</b>	Consistency, Adaptability, Empathy, Deliberative, Relator
<b>Sarah</b>	Achiever, Futuristic, Connectedness, Relator, Learner
<b>Heidi</b>	Adaptability, Responsibility, Restorative, Consistency, Developer
<b>Crystal</b>	Achiever, Input, Positivity, Learner, Intellection
<b>Christina</b>	Achiever, Discipline, Responsibility, Context, Harmony
<b>Julie</b>	Harmony, Includer, Consistency, Empathy, Positivity
<b>Michelle</b>	Individualization, Communication, Responsibility, Empathy, Woo
<b>Leann</b>	Connectedness, Achiever, Relator, Adaptability, Developer
<b>Jennifer</b>	Consistency, Learner, Empathy, Intellection, Discipline
<b>Linda</b>	Individualization, Connectedness, Relator, Analytical, Responsibility
<b>Carter</b>	Context, Individualization, Maximizer, Adaptability, Strategic
<b>Randy</b>	Developer, Empathy, Analytical, Harmony, Intellection
<b>Joanna</b>	Developer, Empathy, Positivity, Includer, Woo
<b>Bev Hoskinson</b>	Developer, Individualization, Responsibility, Ideation, Achiever

STRENGTH	WHO HAS IT	NOTES FOR EMPLOYEE	NOTES FOR SUPERVISOR
<b>Restorative</b>	Makala (2) Heidi (3)	<ul style="list-style-type: none"> <li>• Enjoys fixing problems</li> <li>• 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</li> <li>• 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</li> <li>• Is well-equipped not only to tackle existing problems but prevent and anticipate ones in the future; share this foresight with others</li> <li>• Constant improvement is one of hallmarks of this talent; take opportunities to improve your skills and enhance your abilities through trainings or specializations</li> </ul>	<ul style="list-style-type: none"> <li>• Ask for their observations when you need to identify a problem within your organization; Restoratives will provide acute insight</li> <li>• Turn to Restoratives when a situation needs immediate improvement as they will not panic but will respond in a focused, professional way</li> <li>• 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.</li> <li>• Encourage Restoratives to take advantage of trainings / personal development opportunities</li> </ul>
<b>Achiever</b>	Carri (3) Makala (1) Christina (1) Robin (2) Angel (4) Noel (1) Josh H (1) Crystal (1) Stacy (3) Leann (2) Sarah (1) Bev H. (5)	<ul style="list-style-type: none"> <li>• Relishes feeling busy, especially with measurable projects and outcomes (feeling that you have accomplished sometime finite)</li> <li>• Take time to acknowledge your success before moving on to next task</li> <li>• Self-motivated; will benefit from partnering from other hard workers</li> <li>• Enjoys launching new projects and initiatives, as the prospect of what lies ahead is more exciting than what you have accomplished in past</li> <li>• Make sure that you do not lose quality in your eagerness to "do more"</li> </ul>	<ul style="list-style-type: none"> <li>• Thrives off of work environment that allows them to work as hard as they want and measure their own productivity</li> <li>• Achievers appreciate productive meetings with agendas and measurable action items</li> <li>• Work alongside Achievers and pair them with other hard workers; have low tolerance for "slackers"</li> <li>• Achievers enjoy being busy</li> <li>• 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."</li> </ul>
<b>Deliberative</b>	Rachel Elsea (1) Nick (2) Curtis (4) Greg (2) Dave B. (1)	<ul style="list-style-type: none"> <li>• Is naturally careful, vigilant, and private.</li> <li>• Has naturally good judgment and is often sought as a valuable sounding board</li> </ul>	<ul style="list-style-type: none"> <li>• Partners well with Command, Self-Assurance and/or Activator talents.</li> <li>• Functions as a "brake" for more impulsive personality types; helpful to include them in workgroups with impulsive people; they</li> </ul>

		<ul style="list-style-type: none"> <li>• Deliberative talent shouldn't be misconstrued as tentativeness or fear of action, but intentional careful decision-making</li> <li>• Others trust you because of your consideration and confidentiality in handling conflict</li> <li>• Naturally build friendships slowly and takes pride in small circle of good friends</li> <li>• Give yourself permission to withhold your opinion until you get all the facts and have time to think it over</li> <li>• Does not embrace change quickly; instead prefers to reflect on all possible outcomes before buying in</li> </ul>	<p>will have a "temporizing" effect and add needed thoughtfulness before action</p> <ul style="list-style-type: none"> <li>• Respect their privacy; unless invited, do not push to become personal with them too quickly</li> <li>• Similarly, do not take it personally if they keep you at arm's length</li> </ul>
<b>Activator</b>		<ul style="list-style-type: none"> <li>• "When can we start?"</li> <li>• Always impatient for action</li> <li>• Likes to make own decisions and act on them</li> <li>• Skilled at transforming innovative ideas into immediate action</li> <li>• Helps remove barriers and move projects from discussion phase to implementation</li> <li>• Tenacity may be intimidating to others; you will be more effective if you have first earned others' trust and loyalty</li> <li>• Be strategic in using your Activation skills; consider the best people, time, and place to leverage your ideas</li> </ul>	<ul style="list-style-type: none"> <li>• Prefers to be judged/evaluated on measurable outcomes rather than the process of getting there</li> <li>• Touching base with Activators every so often to ask for their insight and provide critical resources to turn ideas into actions</li> <li>• Partners well with Focus, Futuristic, Strategic, and Analytical as these individuals bring planning and direction to the table</li> <li>• Tell Activators that you know they can make things happen and need their help to do so; it will energize them</li> <li>• 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</li> </ul> <p>Ask Activators about potential new goals and/or improvements they see within the Department and help them take steps towards starting them</p>
<b>Responsibility</b>	Bev (5) Christina (3)	<ul style="list-style-type: none"> <li>• Extremely dependable and accountable</li> <li>• Continue to volunteer for more responsibilities even if you are</li> </ul>	<ul style="list-style-type: none"> <li>• Partners well with other Responsibility partners who share determination to get things done; BUT when this happens, clear</li> </ul>



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

		<ul style="list-style-type: none"> <li>• Comforted by feeling in control of situations; is a perfectionist at heart</li> <li>• Must understand that not everyone feels similar urge for predictability; try to look past their sloppy processes and evaluate them on their results instead</li> <li>• 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</li> <li>• Allow yourself to check your work as often as necessary to make sure it is right—you have the urge to do it anyway</li> <li>• Don't be afraid to ask for specific timelines and/or deadlines; will help to motivate you</li> </ul>	<p>for everything and everything is in its place.”</p> <ul style="list-style-type: none"> <li>• Will excel at projects that result in increased efficiencies</li> <li>• Prefers having timelines and deadlines and making step-by-step plans</li> <li>• Disciplines prefer to get work done ahead of schedule, so the more heads up you can give them with deadlines, the better.</li> <li>• Does not do well with surprises and/or changes in plans/priorities; will be distressing and may ruin their day</li> <li>• Make sure Discipline's colleagues understand their talent as a tool they use to be effective, not inflexible rigidity</li> </ul>
<b>Developer</b>	Bev (2) Makala (3) Angel (3) Jen (2) Lori K (4) Randy (1) Heidi (5) Leann (5) Bev H (1) Joanna (1)	<ul style="list-style-type: none"> <li>• Sees potential in others, looks for ways to challenge others and help them succeed</li> <li>• Others look to you for help and encouragement because they know your helpfulness is genuine</li> <li>• Keep a list of people you have helped to remind yourself of the effect you've had on them</li> <li>• Be sure to articulate the growth you see in others: it will encourage them</li> <li>• May feel compelled to mentor more people than is possible; but can still serve as a “mentor for the moment” i.e., short term</li> <li>• Be careful not to overinvest in losing causes</li> </ul>	<ul style="list-style-type: none"> <li>• Developers will succeed in teaching, coaching, or mentoring roles</li> <li>• Partners well with Individualization talents, as they can assist Developers to identify others' greatest strengths</li> <li>• 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.”</li> <li>• Seek out Developer's insight if you are trying to recognize co-workers</li> <li>• Ask Developers for insight as to how to help YOU, as the supervisor, grow in your job and better supervise others</li> </ul>
<b>Consistency</b>	Bev (3) Meagen (2) Lori H (2) Curtis (1) Julie (3)	<ul style="list-style-type: none"> <li>• Believes everyone should be treated the same; views self as a guardian against unfair advantages</li> <li>• Values predictability, evenhandedness, and fairness</li> </ul>	<ul style="list-style-type: none"> <li>• Consistency talents will exceed in roles where they enforce compliance to a set of standards</li> <li>• Because Consistence values equality, they find it difficult to deal with individuals who bend the rules to fit their situation</li> </ul>



	<p>Dave B (5) Jennifer (1) Heidi (4)</p>	<ul style="list-style-type: none"> <li>• 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</li> <li>• Excels in roles in which you help “level the playing field” for disadvantaged individuals</li> <li>• Believes that respect should only be given to those who truly do the work</li> <li>• 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</li> <li>• Tends to practice what you preach; low “say-do” gap; you consistently deliver on your promises</li> </ul>	<ul style="list-style-type: none"> <li>• Partnering with Individualization and Maximizer may be beneficial as they can remind Consistency when it is appropriate to accommodate individual differences</li> <li>• Be supportive of Consistency during periods of change, as they are most comfortable with predictable patterns</li> </ul>
<p><b>Strategic</b></p>	<p>Carri (2) Noel (2) Rachel Elsea (3) Carter (5)</p>	<ul style="list-style-type: none"> <li>• Often ask “What if this happens?” “But what if this?”</li> <li>• Allow yourself time to muse about a goal you want to achieve until the patterns/issues emerge; this is vital to your Strategic thinking</li> <li>• Leads with their ideas</li> <li>• 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</li> <li>• Explain to others that your Strategic thinking isn’t meant to belittle their ideas but is a natural propensity to consider all alternatives</li> <li>• Trust your intuition as often as possible, even if you are unable to rationally explain them yet</li> </ul>	<ul style="list-style-type: none"> <li>• 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</li> <li>• Strategic is especially adept at identifying repercussions quickly and clearly; with wise forethought, can be instrumental in removing barriers to success</li> <li>• Do not misconstrue Strategic thinking and analysis for negativity or resistance to change; solicit potential alternatives instead</li> <li>• Partners well with Activator: pairs need for action with need for anticipation</li> <li>• 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?”)</li> <li>• Give Strategic time to think through a situation before asking for their input</li> </ul>

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

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



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

		<p>helped; when feeling down or overwhelmed, it will remind you of the difference you have made</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• Accept that your values may differ from others; express your beliefs without being judgmental</li> </ul>	
<b>Positivity</b>	Bev (4) Patrick (4) Angel (5) Crystal (3) Lori K (2) Julie (5) Joanna (3)	<ul style="list-style-type: none"> <li>• Lighthearted, generous with praise, quick to smile, and always on the lookout for the positive in the situation;</li> <li>• People want to be around you; your enthusiasm is contagious</li> <li>• Others often look to you for an emotional “lift” because of your energy and enthusiasm</li> <li>• Make sure your colleagues know your Positivity isn’t naivety: you know that bad things happen, you just prefer to focus on the good</li> <li>• Freely show your appreciation of others; make sure it is not vague, but encouragement that is specific and personal</li> <li>• Protect your Positivity; whiners and complainers will drain you</li> <li>• Help others see the good things they have or have accomplished in their lives; it will energize you both</li> </ul>	<ul style="list-style-type: none"> <li>• 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</li> <li>• Get Positivity involved in planning celebrations</li> <li>• Help Positivity to avoid negative environments and people; instead, pair with other Positivity to energize each other</li> <li>• Positivity can help make people excited about work through their humor and attitude</li> <li>• Do best providing a “spark” to generally positive people, not necessarily cheering up negative people</li> </ul>
<b>Analytical</b>	Nick (5) Greg (3) Dave B. (4) Linda (4) Randy (3)	<ul style="list-style-type: none"> <li>• Challenges others by making them “prove it”; ensures that proposed theories are sound and make sense</li> <li>• Objective; values data; searches for patterns and connections in data and outcomes</li> <li>• Often viewed as logical and rigorous</li> <li>• Identify credible sources on which you can rely; you are at your best with data/information on-hand</li> </ul>	<ul style="list-style-type: none"> <li>• Highlight roles in which individual can analyze data, find patterns, and organize ideas</li> <li>• Partners well with Activator talents, as Activator’s impatience will turn your analysis into action</li> <li>• When pitching a new idea or policy, lead with numbers and data; this will encourage Analyticals to get on board</li> <li>• Often values accuracy (getting it done right) over meeting a deadline; so as a deadline</li> </ul>

		<ul style="list-style-type: none"> <li>• Your mind is always working and producing analysis; don't forget to actually articulate and share that information with colleagues</li> <li>• Offer your assistance to others who may not be as logic-minded or organized to help them organize their data</li> <li>• Explain to others that your skepticism of their ideas is not about them personally, but about the data</li> </ul>	draws near, check in with them to make sure they have the necessary time to complete the task
<b>Futuristic</b>	Robin (5) Sarah (2)	<ul style="list-style-type: none"> <li>• "Wouldn't it be great if...?" is what you often think; a natural dreamer</li> <li>• Fascinated by the future and its potential; always inspired by "better"</li> <li>• Allow yourself the time to think about the future; the more vivid your ideas, the more persuasive you will be</li> <li>• Surround yourself with audiences who appreciate your views of the future and those who are excited to put it in motion</li> <li>• Try to describe your future vision in concrete action steps and detail to allow others to see it with you</li> <li>• Ensure that you can support your futuristic thinking with logic and data to ensure successful results</li> <li>• Help others by discussing the potential you see in them that they may not see themselves</li> </ul>	<ul style="list-style-type: none"> <li>• Will find value in partnering with other Futuristics, as it will foster a discussion about the future and how to make it a reality</li> <li>• Also partners well with Activator talents, who serve to remind them that the future doesn't just happen, you create it</li> <li>• Seek input regarding future planning for the organization</li> </ul>
<b>Intellecion</b>	Makala (5) Rachel Enmen (3) Crystal (5) Jennifer (4) Randy (5)	<ul style="list-style-type: none"> <li>• Likes to think and exercise brain power</li> <li>• Is introspective and enjoys time alone to think things over and muse</li> <li>• May be misconstrued as aloof or disengaged; explain that it is simply your thinking style</li> <li>• Enjoy debate and prodding others to discuss their ideas</li> <li>• Schedule time for thinking; it will energize you and allow you time to</li> </ul>	<ul style="list-style-type: none"> <li>• Get Intellection involved in the beginning planning stages of a project rather than at the tail end; otherwise their insights may come too late</li> <li>• Open to challenging discussion or beliefs; likely won't take offense to it</li> <li>• Succeeds in tasks where thinking, reading, and writing are involved</li> </ul>

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



		<ul style="list-style-type: none"> <li>• Doesn't compete to compete; competes to win</li> <li>• Try to turn ordinary tasks into competitive games; it will increase your productivity</li> <li>• When you win, take the time to investigate why you won, as you will learn the most about yourself after a victory</li> <li>• 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</li> <li>• Develop mental strategies to help you cope with a loss to allow you to move on to the next challenge quickly</li> </ul>	<ul style="list-style-type: none"> <li>• Avoid putting Competitors in roles in which they are likely to consistently fall short or lose; winning matters to them</li> <li>• Give Competition time to mourn their losses</li> <li>• Enjoys the company of other Competitors; pairing Competition with a high level role model who also has Competition will help push potential</li> <li>• Enjoys roles/tasks where achievements can be measured</li> </ul>
<b>Ideation</b>	Josh H. (4) Bev H. (4)	<ul style="list-style-type: none"> <li>• Often labeled creative, original, conceptual, and smart</li> <li>• Fascinated by ideas and by finding connections between events and circumstances that make sense or "fit"</li> <li>• 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</li> <li>• Learn to edit your ideas and separate them into those that are practical and those that are not</li> <li>• Figure out where and when you produce your best ideas and recreate them</li> <li>• Schedule time to read and think, as those are your fuel</li> <li>• Help others follow your train of thought by making your ideas and suggestions more concrete and detailed</li> </ul>	<ul style="list-style-type: none"> <li>• May tend to get bored quickly unless presented with new challenges</li> <li>• Partners well with Analytical because they will question and challenge you, causing you to strengthen your ideas</li> <li>• Encourage ongoing studies and trainings for Ideation to continue gathering knowledge</li> <li>• Bounce new ideas you may have off of Ideation as it will prompt their natural thinking abilities and may garner additional insight</li> </ul>
<b>Maximizer</b>	Carri (1) Dave B. (2) Jessica (4) Carter (3)	<ul style="list-style-type: none"> <li>• Excellence, not average, is your measure</li> <li>• Fascinated by people's strengths; feel compelled to nurture it and stretch it towards excellence</li> </ul>	<ul style="list-style-type: none"> <li>• Excels in roles in which they help people succeed (coaching, mentoring, managing, teaching)</li> <li>• But, do better taking something that works and making it great rather than taking</li> </ul>



		<ul style="list-style-type: none"> <li>• Prefers to spend time with people who appreciate your particular strengths and those who are aware of their particular strengths</li> <li>• 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</li> <li>• Once you have identified your own strengths, stay focused on them; refine them, improve them, practice them</li> <li>• Explain to others that you are not complacent with your weaknesses, but that you find it more productive to spend time improving your strengths</li> <li>• Seek out partners who can help with tasks that you know involve your weaknesses</li> </ul>	<p>something that is broken and making it average</p> <ul style="list-style-type: none"> <li>• Can help you identify best practices in the workplace</li> <li>• Partners well with Restorative, as they will help problem solve when a particular project has drained your energy and enthusiasm</li> <li>• 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</li> <li>• Will become frustrated and discouraged if you spend too much time focused on their shortcomings rather than their strengths</li> </ul>
<b>Significance</b>		<ul style="list-style-type: none"> <li>• Gets value from being recognized, heard, and known to others</li> <li>• When game is on the line, you want the ball</li> <li>• Desires to be seen as credible, professional, and successful; you also seek relationships with those who hold similar traits</li> <li>• Will continue to be pulled from the mediocre toward the exceptional; always reaching</li> <li>• Reputation is important</li> <li>• 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</li> <li>• Note that you may have a tendency to fear failure; don’t let this fear prevent you from staking claims to excellence</li> </ul>	<ul style="list-style-type: none"> <li>• Make sure to articulate your appreciation for those with Significance, as your recognition of their work will go a long way</li> <li>• Prefers leeway to accomplish tasks independently</li> <li>• 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</li> <li>• Performs best when performance is visible rather than behind the scenes</li> <li>• Will thrive off of leading crucial teams and/or significant projects; motivation often comes when stakes are highest</li> </ul>
<b>Input</b>	Carri (5) Greg (4)	<ul style="list-style-type: none"> <li>• Inquisitive; enjoys collecting and keeping things, whether words, facts, quotes, or tangible items</li> </ul>	<ul style="list-style-type: none"> <li>• Will excel in roles in which they are charged with acquiring new information daily</li> </ul>

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

		<ul style="list-style-type: none"> <li>• Develop ways to track the progress of your learning and celebrate your achievements</li> <li>• 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</li> <li>• Honor and respect your desire to learn; take on learning opportunities and new skills whenever possible</li> </ul>	
<b>Includer</b>	Julie (2) Bev (1) Meagen (3) Lori K (5) Lori H (3) Jen (1) Joanna (5)	<ul style="list-style-type: none"> <li>• Consider roles in which you can take responsibility for representing voice that are not usually heard.</li> <li>• Look for opportunities to bring together people of diverse cultures and backgrounds.</li> <li>• Help those who are new to an organization or group get to know other people.</li> <li>• An anti-elitist, you may clash with those who feel they have earned the right to perks and power.</li> <li>• Acknowledge the dissonance you feel when you must be the bearer of bad news.</li> <li>• Chose roles in which you are continuously working and interacting with people.</li> <li>• Realize that people will relate to each other through you.</li> <li>• Explain what we all have in common.</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Ask people with Includer to help you think about potential customers, markets, or opportunities you are not reaching today.</li> <li>• 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.</li> </ul>
<b>Context</b>	Patrick (5) Christina (4) Greg (1) Carter (1)	<ul style="list-style-type: none"> <li>• Before planning begins on a project, encourage the people involved to study past projects.</li> <li>• If you are in a role that requires teaching others, build you lessons around case studies.</li> <li>• Partner with someone with strong Futuristic or Strategic talents.</li> <li>• Accept change.</li> </ul>	<ul style="list-style-type: none"> <li>• During meetings, always turn to people with Context to review what’s been down and what’s been learned.</li> <li>• People with Context think in terms of case studies: “When did we face a similar situation? What did we do? What happened?”</li> <li>• When you introduce new colleagues to people with Context, ask them to talk about their backgrounds before you get down to business.</li> </ul>



		<ul style="list-style-type: none"> <li>• Use fat-based comparisons to prior successes to paint a vivid picture for other of “what can be” in the future.</li> <li>• You recognize the best predictor of future behavior is past behavior.</li> <li>• Compare historical antecedents and situations to your current challenges.</li> <li>• Seek out mentors who have a sense of history.</li> </ul>	
<b>Connectedness</b>	Rachel Enmen (4) Jen (3) Linda (2) Leann (1) Sarah (3)	<ul style="list-style-type: none"> <li>• Consider roles in which you listen and counsel.</li> <li>• Within your organization, help your colleagues understand how their efforts fit in the larger picture.</li> <li>• You are aware of boundaries and borders created within organizations and communities, but you treat them as seamless and fluid.</li> <li>• Help people see the connections among their talents, their actions, their mission, and their successes.</li> <li>• Partner with someone with strong Communication talents.</li> <li>• Your philosophy of life compels you to move beyond your own self-interests and the interests of your immediate constituency and sphere of influence.</li> <li>• Seek out global or cross-cultural responsibilities that capitalize on your understanding of the commonalities inherent in humanity.</li> <li>• Connectedness talents can help you look past someone’s outer shell to embrace their humanity.</li> </ul>	<ul style="list-style-type: none"> <li>• People with Connectedness will likely have social issues that they will defend strongly.</li> <li>• Encourage people with Connectedness to build bridges to the different groups in your organization.</li> <li>• If you also have dominant Connectedness talents, share articles, writings, and experiences with people who have Connectedness. You can reinforce each other’s focus.</li> </ul>
<b>Self-Assurance</b>	Noel (3)	<ul style="list-style-type: none"> <li>• Look for start-up situations for which no rulebook exists.</li> <li>• Seek role sin which you convince people to see your point of view.</li> <li>• Let your self-confidence show. It can be contagious.</li> <li>• Realize that sometimes you will find it hard to put your certainty or intuition</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Help people with self-assurance understand that their decisions and actions do product outcomes.</li> </ul>

		<p>into words, possibly leading others to see you as self-righteous.</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Partner with someone with strong Strategic, Deliberative, or Futuristic talents.</li> <li>• 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.</li> <li>• Set ambitious goals.</li> <li>• 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.</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>
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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 6<sup>th</sup> 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.

# Your Fairfield County Auditor's Office: BY THE NUMBERS



## We Serve. We Protect. We Connect.

**161,064** POPULATION → **3** CITIES | **13** TOWNSHIPS | **12** VILLAGES

**Aa2**  
BOND RATING

**\$230+ Million**  
ALL FUNDS BUDGET



**265 M+**  
Capital assets



**70,000+**  
Parcels



**\$99.6M+**  
New construction  
assessed

### DID YOU KNOW?

Fairfield County unemployment and poverty rates are below state average.



**25,000+**  
Checks/EFTs issued



**416**  
Vendor licenses issued—  
up 67% since 2017



**8,000**  
Properties conveyed  
annually

Modernized Minimum Conveyance Standards  
in August 2022

### DID YOU KNOW?

**70%**  
Conveyances  
processed  
electronically

**24,140+**  
Dog licenses  
issued

**\$3.68B+**  
Total county-  
wide assessed  
valuation

**103,720+**  
Registered  
voters



**1,000**  
Informal reappraisal  
hearings



**504**  
Surveys  
collected

### Of the Participants Surveyed...



felt they were able  
to discuss their  
specific topic



stated they  
received courteous  
customer service



think the Auditor  
should continue  
holding informal  
hearings

Offered three options for reappraisal hearings  
(virtual, in person, and over the phone).

### DID YOU KNOW?



Financial systems  
technology updated



**5,000**  
Water bottles saved



Hotel/motel tax  
tech improvements

Fairfield County has the lowest sales tax rate  
in the region.

### DID YOU KNOW?

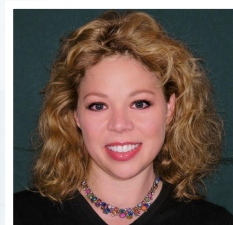
**1,118**  
Social media  
followers

**1 Day**  
Public records  
requests answered,  
on average

**93**  
BOR  
hearings held

**22+**  
Press releases  
issued

Data current as of October, 2022



**Dr. Carri Brown**  
Fairfield County Auditor

### CONTACT US!

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# Your Fairfield County Auditor's Office: Strategic Plan



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

## THEMES

**Provide Supervisory Support & Coaching Opportunities for Team Members**

**Focus on Strengths & Customer Service**

**Improve Communication and Outreach**

**Improve Use of Technology and Records Management Processes**

**Update Financial and REA Processes to Add Value**

## GOALS ACHIEVED



### Accomplishments:

- ✓ All-staff touch-base meetings
- ✓ Employee book club
- ✓ Table of organization
- ✓ Second all-staff survey
- ✓ Position description updates



### Training/Development:

- ✓ Mid-term and annual performance assessments
- ✓ 1:1 meetings: Time with the County Auditor Initiative
- ✓ In-services and annual retreats
- ✓ Team building and recognition activities
- ✓ Strengths assessments
- ✓ Individualized, goal-setting coaching sessions
- ✓ Performance assessment activities supervisor training



### Awards:

- ✓ Developed a traveling trophy award: The Excellence Project
- ✓ 100% of employees obtained National Association of Counties High Performance Leadership Certifications



### Accomplishments:

- ✓ Developed customer service standards
- ✓ Happiness Project to increase community engagement and build upon individual strengths
- ✓ Created a Weights and Measures Certificate of Appreciation
- ✓ Inventory assignments for efficiency and to support internal customers
- ✓ Continuity of operations plans
- ✓ Physical locations to support job shadowing and service provision
- ✓ Documented open meeting procedures for the TIRCs, BOR, and Budget Commission
- ✓ Met all deadlines for reporting
- ✓ Conducted outreach with associations and the general public (more than 50 presentations conducted)



### Training/Development:

- ✓ Developed a job shadowing plan
- ✓ Provided customer service training
- ✓ Two-week onboarding training for new employees
- ✓ Conducted customer surveys



### Accomplishments:

- ✓ Public records request response: one-day average
- ✓ Website inquiry response: one-day average
- ✓ Grew social media presence
- ✓ Developed office directory with purpose statements and contact information
- ✓ Monthly newsletter for internal and external customers
- ✓ 22+ news releases distributed, (Up from 0 in 2021)
- ✓ Proclamations for accounting/appraising skill awareness
- ✓ Multiple Auditor fact sheets and videos
- ✓ Updated websites to provide more information for the public
- ✓ Created an accessible online place for questions



### Training/Development:

- ✓ Attended township, school district, and other entity meetings
- ✓ Conducted diversity, equity, and inclusion training
- ✓ Conducted ethics training
- ✓ Conducted mental health first aid training



### Accomplishments:

- ✓ New informal hearing electronic scheduling option
- ✓ Electronic signature process
- ✓ Electronic option for the conveyance of property, now used more than 70% of the time
- ✓ Map of the Month Initiative
- ✓ New monitoring tool for financial systems technology
- ✓ Dissolved Data Board
- ✓ Participated in Records Commission
- ✓ Reviewed websites for ADA-compliance
- ✓ Maintained current technology for GIS users, including multiple county entities
- ✓ Converted to software as a service function for financial systems



### Training/Development:

- ✓ Participated in county-wide IT group
- ✓ Cybersecurity training for team
- ✓ New technology for hotel/motel lodging tax collections



### Awards:

- ✓ GIS received 1<sup>st</sup> place in the statewide Analytic Mapping Contest



### Accomplishments:

- ✓ Intentional in-reach strategies to help internal customers
- ✓ Fact sheets to support local school districts
- ✓ Process for ditch maintenance districts to support the County Engineer
- ✓ New capitalization threshold for 2023
- ✓ Waived requirements for Budget Commission formal hearings
- ✓ Participated in multiple work groups to improve county-wide services
- ✓ Improved technology deliverables
- ✓ Contract monitoring tool
- ✓ Civic education tools for real estate assessment; three videos
- ✓ Internal Control Manual (Implementing Jan. 2023)
- ✓ Informal hearings
- ✓ Appraisal and new construction notices
- ✓ Minimum standards for conveyance of property
- ✓ Conduct of TIRC meetings, established website presence
- ✓ Efficiency of Board of Revision processes



### Training/Development:

- ✓ New GASB Standards
- ✓ New Board of Revision Administrator
- ✓ Payroll training activities, inter-and intra-departmentally
- ✓ Payroll onboarding processes



### Awards:

- ✓ Excellence Awards for Financial and Popular Reporting

## HONORS...

- 1st Place Statewide Analytical Maps (GIS)
- National Compendium of GIS Best Practices
- National Award of Excellence in Financial Reporting
- National Award of Excellence in Popular Reporting
- Best Practice for Civic Outreach - Athens Advocacy
- 100% of Team Achieved a Certificate of High Performance Leadership for National Association of Counties (NACO)
- Dr. Carri Brown, OU Alumna of the Year

## PRESENTATIONS AVAILABLE

- Proper Public Purpose
- Grants 101
- Consensus Building
- Strategic Planning
- The Role of Local Government and the County Auditor

## CONTACT US!