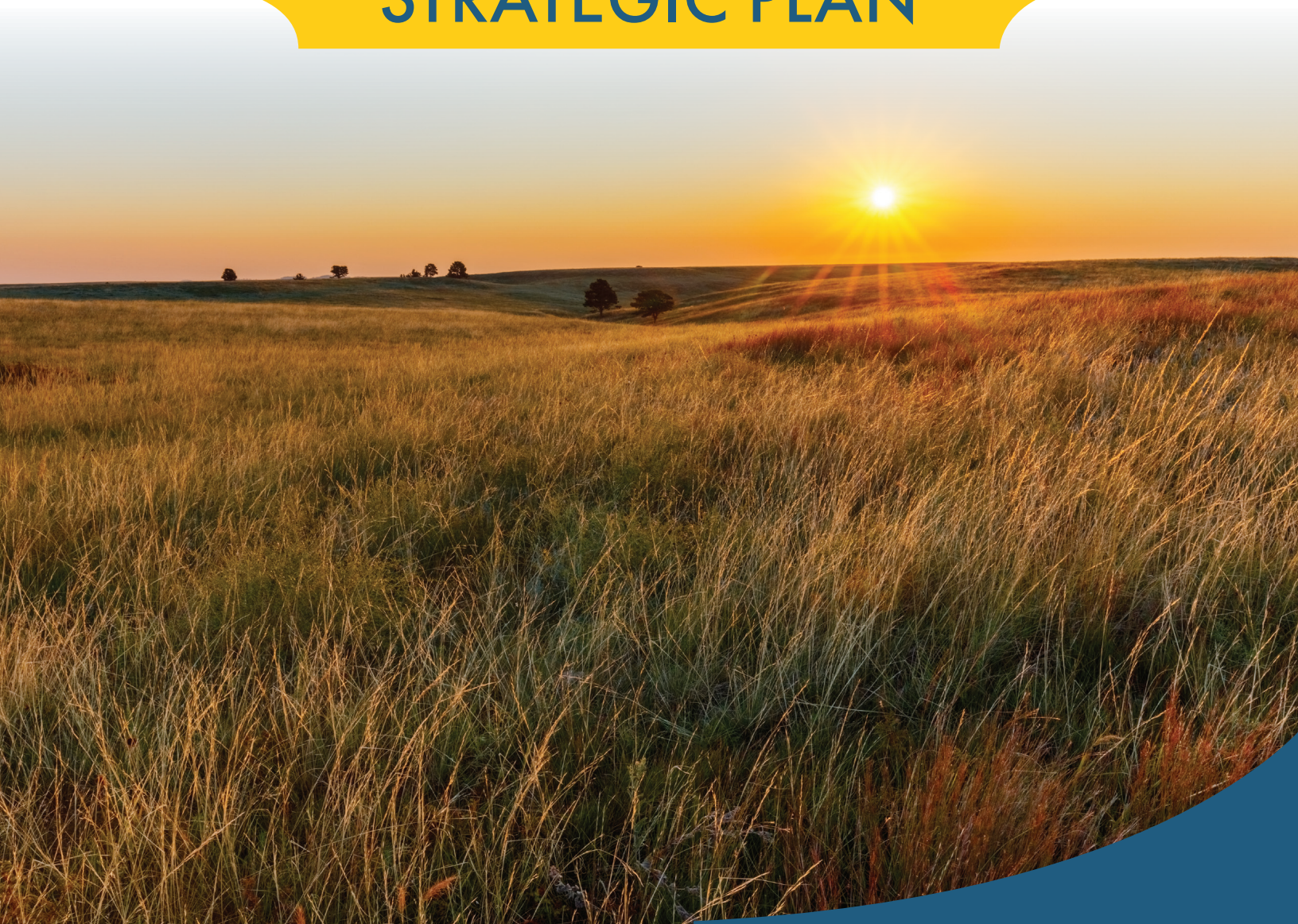




FAIRFIELD  
COUNTY • OHIO  
AUDITOR

2024-2026

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





SERVE • CONNECT • PROTECT

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 employees and stakeholders are working toward common goals,
- establish agreement around intended outcomes and results, and
- assess and adjust the organization's direction in response to a changing environment.

We believe that strategic planning is a worthy, disciplined effort that produces fundamental decisions and actions to shape and guide our organization, who we are, who we serve, what we do, and why we do it – all with a focus on the future.

A strategic plan is a document used to communicate goals and objectives typically for a mid-term period. It is a living document and is expected to be updated and reviewed regularly. The strategic planning process allows an organization to gaze beyond the budget horizon, and it 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 goals. This plan is through 2026, and it was first documented in 2022. A strategic plan is a flexible, living document that should be adapted to internal and external changes inherent in a complex environment with multiple stakeholders and demands. A strategic plan is a helpful tool for the organization to reach its *vision*. The vision is to secure, attractive residential and commercial neighborhoods where people unite to form a caring, learning, participating, sustainable community where each person is important.

***Why do we exist?*** We provide essential financial reporting and data management services to improve accountability, trustworthiness, and credibility in the private and public sectors.

### ***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 2024 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 2024 were:

- accountability
- accessibility for all
- 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.

During the retreat of 2024, we discussed the importance of understanding our **intention** (we want to bolster a brand of excellence); our **attention** (attention is the currency of our leadership, and we will pay attention to what matters most); and our **attitude** (we have a growth mindset and embrace positive communications).

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

Prior to the annual retreats, employees participated in a SWOT analysis. The analysis is an ongoing effort. During the retreats, the SWOT analysis was updated. 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 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.

<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 retreats, 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 are 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
Update the position descriptions and table of organization, ensuring proper alignment with goals, systems, and use of funds.  Interim and annual evaluation process will be in place for 2022 going forward.	December 2021, January 2022- annual review of the table of organization  Interim and annual evaluations have been scheduled for all staff.  Evaluation training was conducted for all employees. All employees have set SMART goals.	Carri Brown	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.  Employees received copies of position descriptions and verified their accuracy. This will also be done with interim and annual evaluations.  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.  Evaluations have been conducted, and there is a normal process for them to continue.
Conduct ASAP/Safety Training	2023 and ongoing	Dave Burgei	Improved safety and readiness – training conducted for REA. Desk exercises have been conducted.
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.
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 third annual all staff survey is underway.

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
**Updated Regularly; Last Updated January 17, 2024**

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, policy, 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 2024 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 and September 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. Training courses from OU were also offered.
Design an agreed upon Code of Ethics/Conduct based on strategic planning retreat discussions	2024	Carri Brown and Team	Draft is in place; includes a "why" statement. A slide show summarizes the work.
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; implementation will be by 10.2023
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 volunteer activities, such as with the Park District and the Fair. In-services were conducted.

**COMMENTS** The above task list is not inclusive of all activities.

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
*Updated Regularly; Last Updated January 17, 2024*

<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 ; implement post pandemic procedures for municipal income tax withholding	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; procedures and communications were developed.
Create Drop in Option for Payroll; develop intentional departmental outreach for Financial Systems	January 2023 and ongoing	Jen Dickerson, and Michelle Wright	Improved internal services; 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; examine process and deadlines for w-2s	2024 and ongoing	Payroll Team and Jen Dickerson	Increased efficiency and coordination with departments; w-2s were available on January 16, 2024, a new record for timeliness.
Focus on onboarding and reconciliations; include a process to connect with onboarding	2023	Jen Dickerson and Michelle Wright	Improved relationship with HR; improved internal services; improved employee experience
Continue to develop new BOR Administrator; define roles for BOR	2023	Dave Burgei & Linda O'Toole	Transfer of knowledge; refined processes; documented communication and online access; training has been successful
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	Bev Hoskinson	Potential Improved access to financial data; as of March, we are current with existing process



**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
*Updated Regularly; Last Updated January 17, 2024*

<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 & Dave Burgei	Determine if evening hours and virtual options have use for the public; examination of scheduling tools. Outreach at the fair was conducted in 2022.
Participate in statewide parcel project and advisory committee	2024-2026	Dave Burgei	Fact sheet to be created in 2024; statewide parcel helps with accessibility of data
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 2024; review process for appraising low-income housing	2023 - 2024	Linda O'Toole, Crystal Walker, Makala Finley, Noel Sodders, & Josh Harper	Improved knowledge about process for the public and stakeholders; updated daily; procedures were reviewed
Continue waiver of requirement for formal hearings with the Budget Commission; align estimates of revenues with Commission long-term planning tool; update process with Sharepoint technology	2023; 2024	Carri Brown, Angel Horn, Bev Hoskinson & Amanda Rollins	Increased efficiency; waived 2.2022; new process piloted with success in April 2022; revenue estimates are aligned ; more efficiency with multiple entities
Continue to update the Hotel/Motel lodging procedures using AI	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 (public safety) and EMA 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; fact sheet completed by 9.2023
Prepare documentation and training for fuel card, credit card, and vendor card policy	2023	Rachel Elsea and Directors	Improved internal control; documented procedures

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
**Updated Regularly; Last Updated January 17, 2024**

Create a CAUV map that includes known solar leases; update that map annually (with the first update to the original map in January 2024)	2022-2024	Carri Brown and Nick Dilley	Improved organizational knowledge; March 2023 map of the month created
Improve the creation of the federal schedule; ensure all financial reporting deadlines with the Hinkle System and with GFOA are met ; conduct training; update internal control manual; and improve data stewardship and HR connections	2024	Bev Hoskinson	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	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 in November	2022 and ongoing	Nick Dilley & team	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, implement new grant reporting module	2023 -2024	Bev Hoskinson	Improved control and quality; new module for ADAMH, DD, and Health Department in 2024
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	Angel Horn	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; monitor contract	2023	Dave Burgei	Quality preparations for required update of values; contract is in place and is monitored
Establish a formal process for a change of address for REA	2023	Josh Harper	Improved public service
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

**COMMENTS** The above task list is not inclusive of all activities.

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
*Updated Regularly; Last Updated January 17, 2024*

<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>			
Action Step(s)	Task Completion / Review Date	Assigned To	Results
Communicate individual strengths focus; conduct assessment to identify individual strengths and compile helpful notes for supervisors and employees	January 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 January 17, 2024**

Develop teeny tiny trainings - for frequently asked questions	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; update depreciation schedules	2023	Angel Horn and Beverly Hoskinson	Better time management and support of financial officers; resolution draft has been prepared
Update the Internal Control Manual; update capitalization threshold to \$10K; create new manual for settlements; develop Wednesday Word to the Wise for communications	2023	Bev Hoskinson, 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; REA exercises held
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, IT strategies work group, and Security	2023 and ongoing	Jen Dickerson, Michelle Wright, Beverly Hoskinson, and Rachel Elsea	A list of work groups with participants is available and communicated each Monday
Continue Happiness Project/Culture Champion projects	2023 and ongoing	Carri Brown, Michelle Wright, Jessica Ferguson, and Stacy Knight	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; Christmas projects were implemented; employees helping employees research initiated
Focus on financial reporting strength to add value to Fairfield County by continuing MCJDC services with the costs of services recognized	2023 - 2026	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; increase training opportunities	2023	Managers	Piloting with two new employees, working well; all employees have been offered training opportunities
Quickly and appropriately distribute food pantry settlement dollar recommendations from the Dollar General lawsuit; create follow up testing schedules	2023	Carri Brown & Weights and Measures Team	Recommended funds for holiday season of 2023; prepared communications in November 2023
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

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

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
*Updated Regularly; Last Updated January 17, 2024*

<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. As of October 2023, 50 presentations will have been conducted.
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; include “a day in the life” videos for key positions	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; payroll videos were created in 2023
Attend at least one of each of the 13 township meetings throughout the period; issue communications to support entities; attend other entity meetings	2023-2026	Carri, Rachel, and Managers	Additional outreach and communication; multiple communications have been made with townships
Attend county agency board meetings throughout the period, at least three	2024-2026	Carri, Rachel, and Managers	Additional outreach and communication
Conduct at least three civic group presentations.	2024-2026	Carri and Rachel	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



**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
**Updated Regularly; Last Updated January 17, 2024**

Evaluate possibility of an Ohio Chapter of IAAO – share information with private appraisers	2023 - 2026	Josh Harper and Team	Improved organizational knowledge; connections with private appraisers
Refine team purpose statements and draft a new directory; distribute directory; conduct accessibility review of operations	2023 and ongoing	Rachel Elsea	Improved communications; added notary notations for accessibility; conduct training for those with dementia; prepare sensory tools for the public; organize communication for Veterans – conduct 2 <sup>nd</sup> annual training
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	2023-2026	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	2024 and ongoing	Rachel Elsea, Dave Burgei, Josh Harper	Improved civic education and outreach; improved efficiency
Plan for awareness activities for 50+ accounting professionals in the county	2023 and annually	Carri Brown	Awareness activities were conducted and are ongoing
Plan awareness activities for appraisal professionals and real estate assessment	2023 and annually	Josh Harper and Carri Brown	Proclamation and communication activities were prepared
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 -2026	Rachel Elsea and Carri Brown	2022 report is a baseline; 2023 report is in progress
Create outreach and/or roundtable opportunities for townships and corporations	2024-2026	Bev Hoskinson and Angel Horn & Amanda Rollins	Procedures for Vendor Self Service are under review in 2024
<b>COMMENTS</b> The above task list is not inclusive of all activities.			

**Strategic Plan for the County Auditor's Office**  
**2022-2026**  
*Updated Regularly; Last Updated January 17, 2024*

<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>			
Action Step(s)	Task Completion / Review Date	Assigned To	Results
Participate in the Records Commission, review office procedures and storage	2023 and ongoing	Rachel Elsea and Angel Horn	Proper records management;
Ensure Cybersecurity training is taken by all team members; implement 2 factor 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; develop the 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	Settlement Clerks	Improved use of available technology
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	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; update county building tour	2023 and ongoing	Rachel Elsea & Nick Dilley	Improved access to online information for residents
Update Finance and REA disaster plan recovery plan, focusing on management letter tasks	By the end of 2023 and annually	Bev Hoskinson and Work Group	Meeting with Auditor of State held on 10.16; work group activities assigned; quarterly testing done
Support the Board of Elections, HRCDD, SWCD, DD, and others with data and fact sheets	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 an electronic process for moving documentation to departments for lot splits	2024	Dave Burgei and Team	Improved service and understanding for the public
Examine Butler County dog licensing procedures and evaluate new processes	2024	Bev Hoskinson & Angel Horn	Evaluation of dog licensing procedures
Develop workgroup with Treasurer	2024	Noel Soddors	Improved knowledge about taxation processes
Develop a long-term list of technology and asset requirements for replacement	2023 - 2026	Directors and Rachel Elsea	Better planning for budget requests and operations

### ***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.

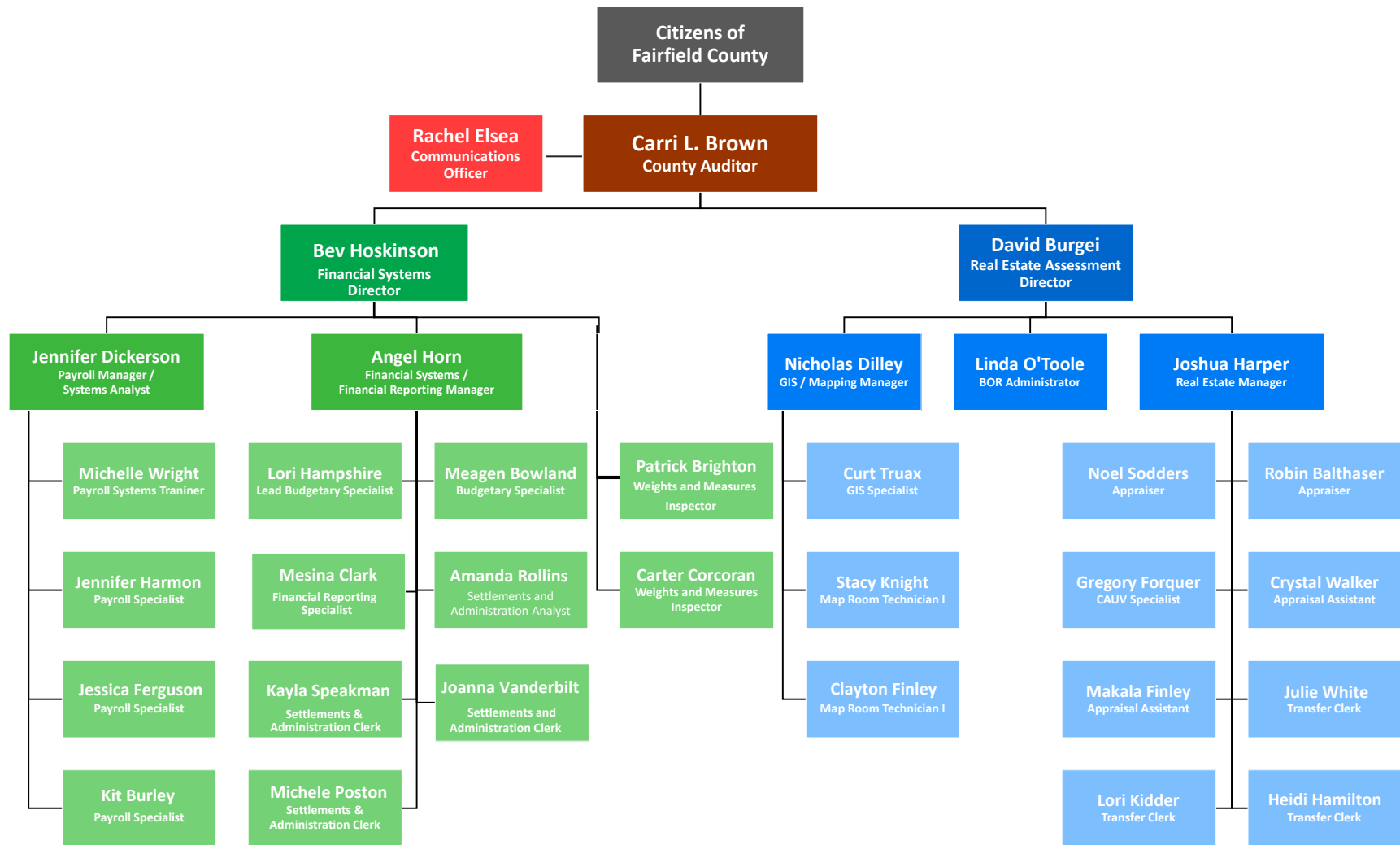
An all-staff survey was conducted in October 2021 and October 2022. Various stress relief activities will be conducted in 2023.

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
- Code of Ethical Conduct





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

**For Auditor Use**  
39.16%: General Fund  
60.84%: REA Fund

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



**31.375**  
FULL-TIME  
EMPLOYEES



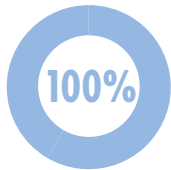
**33.875**  
2.5 full-time  
employees fewer  
than one year ago

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

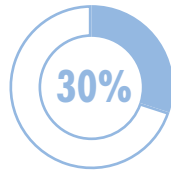


**55.45%**  
of salaries are supported  
by the **Real Estate  
Assessment fund**

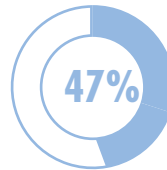
## COUNTY AUDITOR EMPLOYEES ARE **highly trained, skilled, and experienced.**



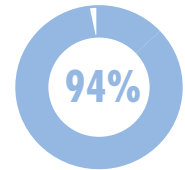
have obtained a  
**professional certification** or  
**association certificate**



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](http://fairfield-county-auditor.org)

<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) Kit (4) Amanda (3)	<b>ACHIEVER</b> Carri (3) Makala (1) Christina (1) Robin (2) Angel (4) Noel (1) Josh H (1) Crystal (1) Stacy (3) Bev H. (5) Kit (2)	<b>HARMONY</b> Patrick (1) Christina (5) Meagen (5) Nick (3) Stacy (1) Lori K (3) Julie (1) Jessica (3) Randy (4) Michele (5)	<b>CONSISTENCY</b> Bev (3) Meagen (2) Lori H (2) Curtis (1) Julie (3) Dave B (5) Jennifer (1) Heidi (4)
		<hr/> <b>INDIVIDUALIZATION</b> Michelle (1) Linda (1) Carter (2) Bev H (2)	<hr/> <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) Kit (1) Amanda (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) Amanda (4)
<b>DEVELOPER</b> Bev (2) Makala (3) Angel (3) Jen (2) Lori K (4) Randy (1) Heidi (5) Bev H. (1) Joanna (1) Michele (1)	<b>RELATOR</b> Greg (5) Patrick (3) Stacy (3) Jessica (5) Angel (2) Rachel Elsea (4) Curtis (5) Linda (3) Amanda (2)	<b>INPUT</b> Carri (5) Greg (4) Jen (5) Robin (4) Rachel Enmen (1) Crystal (2) Kit (5)	<b>BELIEF</b> Josh H. (3) Rachel Elsea (2)
			<hr/> <b>RESTORATIVE</b> Makala (2) Heidi (3) Michele (4) Amanda (1)
<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) Michele (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) Michele (2)	<b>FUTURISTIC</b> Robin (5)	<b>CONTEXT</b> Patrick (5) Christina (4) Greg (1) Carter (1)
		<hr/> <b>SELF ASSURANCE</b> Noel (3)	
<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)	<b>DISCIPLINE</b> Christina (2) Dave B (3) Jennfier (5) Kit (3)	<b>WOO</b> Noel (5) Lori H (4) Michelle (5) Joanna (5)

<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>Amanda</b>	Restorative, Relator, Responsibility, Empathy, 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>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
<b>Kit Burley</b>	Learner, Achiever, Discipline, Responsibility, Input
<b>Michele</b>	Developer, Connectedness, Analytical, Restorative, Harmony



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.

**162,898** POPULATION → **3** CITIES | **13** TOWNSHIPS | **12** VILLAGES

**Aa2** BOND RATING | **\$200+ Million** ALL FUNDS BUDGET



**279 M+**  
Capital assets



**72,000+**  
Parcels



**\$100M+**  
New construction  
assessed

### DID YOU KNOW?

Fairfield County unemployment and poverty rates are below state average.



**26,000+**  
Checks/EFTs issued



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



**6,750**  
Properties conveyed  
annually

Modernized Minimum Conveyance Standards

### DID YOU KNOW?

**70%**  
Conveyances  
processed  
electronically

**21,203+**  
Dog licenses  
issued

**\$5.84B+**  
Total county-  
wide assessed  
valuation

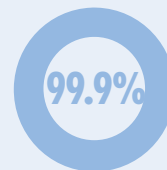
**108,297+**  
Registered  
voters

**WHY DO WE EXIST?** We provide leadership with essential financial reporting and data management services to improve accountability, trustworthiness, and credibility in the private and public sectors.

**728**  
Surveys  
collected

**250**  
Address  
changes  
made online

### 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

GIS created a virtual tour of county buildings that can be found on the Fairfield County homepage

### DID YOU KNOW?



Financial systems  
technology updated



**6,738**  
Water bottles saved



Hotel/motel tax  
tech improvements

Fairfield County has the lowest sales tax rate in the region

### DID YOU KNOW?

**3,815**  
Social media  
followers

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

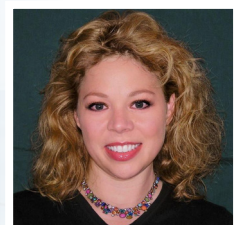
**117**  
BOR  
hearings held

**30+**  
Press releases  
issued

Data current as of October, 2023

**"Awesome folks working here! The best in Government! Very courteous and helpful with my needs. They went over and beyond helping me. Fantastic service! Best I've found anywhere."**

Respondent of customer survey



**Dr. Carri Brown**  
Fairfield County Auditor

### CONTACT US!

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

# 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
- ✓ Third all-staff survey
- ✓ Position description updates
- ✓ Inservices re: referrals and annual retreats
- ✓ Issued an office Code of Ethical Conduct
- ✓ Request by CAAO to create and host leadership conference

### 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
- ✓ Received first-ever tech-credit grant
- ✓ Celebrate Women & Leadership Summit
- ✓ Members of AGA, GFOA, and CPIM - attend multiple seminars

### Awards:

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

### Accomplishments:

- ✓ Championed customer service standards
- ✓ Happiness Project to increase community engagement and build upon individual strengths
- ✓ Honored those with exceptional Weights & Measures practices
- ✓ 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 payroll and financial reporting
- ✓ Conducted outreach with associations and the general public (more than 60 presentations conducted)
- ✓ Provided same-day legal review for lot splits

### Training/Development:

- ✓ Record 98% CAUV apps returned prior to April 4 deadline
- ✓ Created lot splits factsheet to help with house development
- ✓ Conducted internal trainings
- ✓ Two-week onboarding training for new employees
- ✓ Conducted customer surveys

### Awards:

- ✓ NACO Achievement Award for Board of Revision services and statewide references

### Accomplishments:

- ✓ 300 visitors to REA building during Tour of Homes
- ✓ Hosted inaugural Real Estate Summit
- ✓ Partnered with OSU Ext. for landscaping project
- ✓ Public records request response: one-day average
- ✓ Website inquiry response: one-day average
- ✓ Tripled social media presence
- ✓ Updated office directory with purpose statements and contact information
- ✓ Monthly newsletter for internal and external customers
- ✓ 30+ news releases distributed, (Up from 0 in 2021)
- ✓ Proclamations for accounting/appraising skill awareness, GIS, W&M
- ✓ Multiple Auditor fact sheets and videos
- ✓ Updated websites to provide more information for the public
- ✓ Served as subject matter experts to other counties

### 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
- ✓ Partnered with Ohio Prisons for workforce training

### Accomplishments:

- ✓ GIS partnership with public safety to improve response times
- ✓ 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
- ✓ One of first county offices to implement new phones and multi-factor authentication
- ✓ Participated in Records Commission
- ✓ Reviewed websites for ADA-compliance
- ✓ Maintained current technology for GIS users, including multiple county entities
- ✓ Managed software as a service function for financial systems to reduce down time

### Training/Development:

- ✓ Participated in county-wide IT group
- ✓ Cybersecurity training for team
- ✓ Implemented AI for improved motel lodging tax collections to benefit tourism

### Awards:

- ✓ GIS received 1<sup>st</sup> place in the statewide Analytic Mapping Contest
- ✓ GIS showing leadership in statewide workgroup to improve digital parcels

### Accomplishments:

- ✓ Intentional in-reach strategies to help internal customers
- ✓ Fact sheets to support local school districts and libraries
- ✓ New capitalization threshold and depreciation
- ✓ Waived requirements for Budget Commission formal hearings
- ✓ Participated in multiple work groups to improve countywide services
- ✓ Improved technology deliverables
- ✓ Contract monitoring tool
- ✓ Civic education tools for real estate assessment; three videos
- ✓ Updated Internal Control Manual
- ✓ 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
- ✓ Payroll training activities, inter- and intra-departmentally
- ✓ Payroll onboarding processes

### Awards:

- ✓ Excellence Awards for Financial and Popular Reporting

## HONORS...

- National Award of Excellence in Financial Reporting
- National Award of Excellence in Popular Reporting
- Inaugural OU Women's Leadership Summit
- Staff featured in state and local news publications
- 1<sup>st</sup> Place Statewide Analytical Maps (GIS)
- National Compendium of GIS Best Practices
- 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, 2023 FBI Citizenship Academy and Community Emergency Response Team training graduate
- Coronet Awards from the Fairfield County Heritage Association

## PRESENTATIONS AVAILABLE

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

## CONTACT US!