



FAIRFIELD  
COUNTY • OHIO  
AUDITOR

2025-2030

STRATEGIC PLAN





## 2025-2030 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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## **Introduction to the Strategic Plan**

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. It is an activity that is both prescribed and organic.

A strategic plan is a document used to communicate goals and objectives typically for a mid-term period of five years. It is a living document and is expected to be updated and reviewed regularly. The strategic planning process allows an organization to gaze beyond a 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 challenges.

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 2030. It was first documented in 2022 and is updated regularly.

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.***

***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***

- 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, civility
- work-life balance
- strategic
- personal service – grass roots orientation
- empowerment

We value 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). We value the delivery of cost-effective services (keeping costs down for taxpayers), as well as honoring tradition and history of Fairfield County. 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.

We have discussed the importance of organization health and 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>Summary of SWOT Analysis</b>	
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• County partnerships</li> <li>• Understanding and use of stakeholder theory</li> <li>• Positive communication</li> <li>• Technical knowledge &amp; competencies</li> <li>• Dedicated leadership</li> <li>• Passionate team members</li> <li>• Purpose-filled work</li> <li>• Connections with county human infrastructure</li> <li>• Structure that brings the 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>• Strong leadership</li> <li>• Training opportunities</li> <li>• Organizational health, civility</li> <li>• Good organizational structure for problem solving</li> <li>• Updated processes and technological tools</li> <li>• Strong ERP and EAT systems with good staff connections and interfaces and work groups</li> <li>• Knowledgeable and independent weights and measures inspectors</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Technology &amp; processes need improved in an ongoing way</li> <li>• Services are not as well known in the community as they could be</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>• True collaboration is very hard work, involving multiple stakeholders</li> <li>• Processes are complex</li> <li>• Employees feel an increasing amount of stress</li> <li>• There are market pressures that are burdensome to some property owners, adding complexity to required communications about property taxes</li> <li>• Long-term planning requires succession planning and there needs to be more thinking about this topic</li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>• Potential to engage other entities in strategic reviews; potential to engage more associations and legislators</li> <li>• Growing county offers stability as well as pressures for more services</li> <li>• Relatively stable economy with a healthy financial position of the county</li> <li>• Ongoing reviews of processes will allow for improvements and new technologies, such as with DocLink and the lot split application</li> <li>• Improvements in communications and continued increased use of social media platforms</li> <li>• Additional training is welcome - internally and externally; requirements for training of risk management and fraud, ethics, and unlawful harassment have been met with positivity</li> <li>• Communication of BOR processes and leadership on a statewide basis to help with understanding about BOR processes</li> <li>• Updates for manuals and desk aids, especially for activities within settlements and administration</li> <li>• New property tax exemption opportunities for pre-residential properties</li> </ul>	<ul style="list-style-type: none"> <li>• Uncertainty in the economy, especially mid-long term</li> <li>• Increasing costs of technology and supply chain disruptions</li> <li>• Increasing costs of critical contracted services related to technology</li> <li>• Cybersecurity threats</li> <li>• Public misinformation and misunderstandings, particularly about BOR or appraisal processes</li> <li>• Public discontent about increases in valuations arising from market activity (with no current legislative changes in place at the state level to ease the burden of property taxes)</li> <li>• Labor shortage (internal and external aspects)</li> <li>• Exponentially increasing need for new technological competencies</li> <li>• Complexities of artificial intelligence initiatives</li> <li>• Increased fraud in all sectors</li> </ul>

### ***Additional 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***.

Recruitment, retention, and recognition activities are meaningful. Supervisors will continue to develop ***coaching and mentoring opportunities***.

We will ***continue to seek input and feedback*** from our stakeholders.

### ***Appraisal Updates***

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.

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 Board of Revision process has continued to improve, and there are opportunities to improve communication and understanding of the ***appraisal and review process***. Legislation impacts the BOR processes. The rules and regulations have been updated for the BOR reorganizational meeting in 2025.

## ***Communications***

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

- Created fact sheets for mailings, newsletters, media releases, and other distribution; many of these fact sheets have been replicated for statewide use
- Created video presentations
- 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:***

- Focused on ***payroll coordination*** and improvements unique for each department, developing new codes and processes as needed
- Increased integration with departments, including ERP and EAT ***workgroups*** that engage stakeholders
- Engaged ***townships, municipalities and school districts*** as needed to be of support to one another
- Improved tax incentive review ***council*** documentation
- Improved efficiency of Budget Commission operations

We want to continue these communication efforts. We have a rapid response plan and a communications strategic plan, as well.

## ***Strategic Themes***

During the annual retreat, we examine the strategic plan and asked:

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:

- What can we do together to improve our organizational culture and organizational health?
- 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; Improved Organizational Health			
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.	Table of Organization is updated; position descriptions are current; individual and team goals are in place annually.	Carri Brown	By December 2024, 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 report the table of organization is clear. Updates for new hires will continue to be made.
Interim and annuals occur for all employees	Interim and annual evaluations have been scheduled for all staff.  Evaluation training was conducted. All employees have set SMART goal templates.	All Supervisors	Evaluations have been conducted, and there is a normal process for them to continue. Feedback has been helpful for the growth and development of team members.
Conduct ASAP/Safety Training	2025 and ongoing	Dave Burgei & Bev Hoskinson	Improved safety and readiness – training conducted for REA. Desk exercises have been conducted. Finance updates have been made. With Finance, there are some building upgrades to occur in 2025 based on the recommendations of subject matter experts.

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Provide NACo High-Performance Leadership training for all; Provide additional training opportunities for all; Apply for tech cred training with input on desired training; support Celebrate Women and Women's Leadership Summit, as well as Chamber programs	Annually, all employees have training opportunities.	Carri Brown	Leadership is at all levels. All of staff have certificates. More than 25 technical credentials have been obtained. Tech cred training is in progress as of December 2024. Robin and Crystal will attend Chamber training in 2025.
One-on-one meetings & coaching/combined with "stay" interviews/an all-staff survey	Annually	Carri Brown and Rachel Elsea	Employees have opportunities for one-on-one times.
Conduct weekly "touch base" meetings with all-staff	Meetings will be held on Mondays to set priorities.	Carri Brown	Monday Morning Meetings have been held since 2021. Employees comment they appreciate reviews of ethics, policy, and goals.
Conduct an all-team retreat	Annually	Carri Brown and Rachel Elsea	Deliverables include Mission Clarity; Individual Smart Goals; Ethics Training; Unlawful Harassment Training; Inservice Ideas, etc. Notes are available.
Conduct individual strengths assessment and connect the assessments with tools to support the performance evaluation process	Annually	Carri Brown	Each employee has insight about individual strengths and how those strengths are needed for team success. Each supervisor has a reference tool.
Prepare in-services to provide information about topics of interest to the team members	4 annually	Carri Brown	In-services were discussed during all-term meetings. Mental health is a focus.
Ensure there is information readily available about policy and insurance programs	Annually and ongoing	Rachel Elsea	Rachel Elsea is the point of contact for human resource matters
Design an agreed upon Code of Ethics/Conduct based on strategic planning retreat discussions	Annually	Carri Brown and Team	The code is in place; it includes a "why" statement. A slide show summarizes the work.
Conduct an analysis for succession planning; hire a mapping technician in 2025	2027-2030; 2025-2026	Carri Brown and Directors	Stability of services; budget is in place for 2025 needs
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	Annually and ongoing	Directors and Carri	Ongoing monitoring for effectiveness is in place. Employees report appreciation of this effort.
Provide stress relief activities during Monday Morning Meetings	2025, and then evaluate	Carri and Managers	Employees will feel supported by supervisors
Explore creations of a local IAAO chapter	2027	Josh Harper and Noel Soddors	Improved opportunities for appraisers
Complete at least two activities for individual recognition and two activities for team building; Continue GEM program at the departmental level. Refresh the culture champions initiative.	2025-2030	Rachel Elsea & Stacy Knight, Jessica Ferguson, Michelle Wright, & Kayla Speakman	Recognition (GEMS, certificates) & "Living our Values" traveling trophy are in place. Team participates in volunteer activities. Culture Champions are in place.

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

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<b>STRATEGIC THEME</b>			
<b>Update Processes to Add Value</b>			
<b>CHAMPIONS: Directors and Managers</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>
Develop Enterprise Resource Planning work group with stakeholder engagement; focus on quality of data sets in order to improve reporting flexibility	2025 and ongoing	Bev Hoskinson, Jen Dickerson	Improved knowledge of ERP and payroll/system processes; integrated training will continue; communications were developed; more effective use of ERP
Create "Drop in Options" for Payroll; develop intentional departmental outreach for Financial Systems; create annual trainings; support entities under fiscal watches or emergencies	Annually (ongoing)	Bev Hoskinson, Jen Dickerson, and Michelle Wright	Improved internal services and financial control; improved abilities to participate in budgeting processes
Develop a financial leadership academy for stakeholders	2025	Bev Hoskinson	Improved financial competencies within the county
Develop surveys and process for library allocations from the state	2025 and ongoing	Carri Brown and Amanda Rollins	Improved Budget Commission processes
Focus on onboarding and reconciliations; include a process to connect with onboarding	2025 and ongoing	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; update rules and regulations; maintain statewide website and reference materials	2025 and ongoing	Dave Burgei & Linda O'Toole	Transfer of knowledge; refined processes; documented communication and online access; training has been successful
Develop a log of GIS services and requests; track turnaround times for law enforcement, transit, and other political subdivisions	2025 and ongoing	Dave Burgei and GIS team	Improved documentation of critical GIS services provided for transit, law enforcement, and others
Develop training about GASB 87 and other GASB pronouncements and internal control; Develop a plan for purchase order decentralization; participate in AGA webinars and other AGA activities; attend GFOA conferences	2026 and ongoing	Carri Brown, Bev Hoskinson and Angel Horn	Improved Organizational Knowledge; improved internal control; new manual introduced and updated; PO process in place and will be monitored; AGA & GFOA opportunities are in place
Continue weights and measure inspectors training and documentation of processes	2025 and ongoing	Patrick Brighton & Carter Corcoran	Detailed documentation of reports
Review transparency modules (checkbook) for return on investment; ensure State Treasurer has annual information; continue to monitor stakeholders needs with enterprise systems	Annually, 2026-2030	Bev Hoskinson	More meaningful access to financial data and understanding or financial processes

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<b>STRATEGIC THEME</b>			
<b>Update Processes to Add Value - Continued</b>			
<b>CHAMPION: Directors and Managers</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>
Schedule evening hours for REA/Hold an "Information Night" – Use new scheduling options with technology; BOR materials automatically placed online	2025 and 2028 – and ongoing	Josh Harper & Dave Burgei	Determine if evening hours and virtual options are good for the public; examination of scheduling tools. Online posting of BOR materials reduces public records requests because the materials are readily available.
Participate in statewide parcel project and advisory committee	2025 and ongoing	Dave Burgei	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.	ongoing	Dave Burgei and Josh Harper	Better public understanding of appraisal process. Surveys show exceptional service.
Review appraisal communications and make edits if needed; create website updates; update BOR data online every 24 hours; review process for appraising low-income housing	2025 and ongoing	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 Budget Commission for budgets; develop reasonable estimates of revenues; update process with DocLink technology; plan monthly meetings as needed; <b>monitor legislation about Budget Commission and taxation</b> ; support modernization of property tax processes and improvements of the Homestead program	2025/2026 and ongoing	Carri Brown, Angel Horn, Bev Hoskinson & Amanda Rollins	Increased efficiency; revenue estimates are aligned with reality; more efficiency with multiple entities; we need to monitor legislation for hearings about levies; we need to be engaged with associations and legislators; process changes may be required
Continue to update the Hotel/Motel lodging procedures using AI	2025 and ongoing	Mesina Clark, 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; coordinate with fire chiefs	2025 and ongoing	Dave Burgei and GIS Team	Improved safety services; good partnerships
Prepare documentation and training for fuel card and vendor card policy	2025	Rachel Elsea and Directors	Improved internal control; documented procedures

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Create a CAUV map that includes known solar leases; update that map annually	2025 and annually	Carri Brown and GIS Team	Improved organizational knowledge
Improve the creation of the federal schedule; ensure all financial reporting deadlines with the Hinkle System and with GFOA are met ; update internal control manual and data stewardship	2025 and ongoing	Bev Hoskinson	Increased accuracy in financial auditing process; improved support for departments
Participate in stormwater utility work group if this is organized	As needed	Dave Burgei	Connecting with County Engineer who will lead the group
Document all procedures and improve manuals, for each position	2026-2030	Directors	Improved job knowledge and ability to sustain operations
Develop the GIS team; create a map of the month each month; honor the map of the year; conduct a GIS Day in November; develop new programs and outreach for GIS, including connections with law enforcement and workforce development	2025 and ongoing	Dave Burgei and Curt Truax, Stacy Knight, Clayton Finley, and Bobby Fagrell	Improved use of GIS tools; improved recruitment, retention and recognition; documentation and understanding of services provided
Monitoring of Financial Systems contracts, implement new grant reporting module	2025 and ongoing	Bev Hoskinson	Improved control and quality; new module for ADAMH, DD, and Health Department
Monitoring of REA related contracts	2025 and ongoing	Dave Burgei	Improved control and quality assurance
Plan for budgeting of fixed assets (gas tank, scanners, folder equipment, laptops, etc.)	2026-2030	Directors	Improved expectations and financial control
Track workload and outcome measures	2025	Directors	Knowledge of who to contact for what purpose and what the work means for the public
Organize tax pay-ins to support ADAMH and DD; organize estimated revenue adjustments	2025 and ongoing	Angel Horn	Efficient operations; review for adjustments
Ensure ongoing reconciliation of fiduciary funds	2025 and annually	Angel Horn and Jen Dickerson	Improved financial reporting and auditing
Participate in statewide discussions about legislation and other topics of interest; planning CAAO meetings in Fairfield County; monitor recommendations about property taxes of which many are strongly supported (such as the expansion of the Homestead program and various guardrails to reduce tax burdens); develop virtual meeting options	2025-2030	Carri Brown	Prepared Q/A for CAAO brochure; reached out to legislators; attended legislative events; developed additional fact sheets; CAAO meetings and training held in Fairfield County; leading communications work group
Develop an internship program to support workforce development and the GIS Team	2025-2030	Carri Brown	A fact sheet about lessons learned with interns has been prepared.
Continue to monitor changes with the dog licensing process	2025 and annually	Kayla Speakman & Michele Poston	Updated procedures in 2025; evaluation to come
Issue a request for proposals for triennial update; let contract; monitor contract; conduct triennial and prepare communication plan	2026; 2028	Dave Burgei	Quality preparations for required update of values
Improve upon the Excellence Project, with certificates and additional recognition	2025 and ongoing	Carri Brown and Managers	Every moment is an opportunity to show excellence – cite examples; create recognition opportunities

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

<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; make sure new employees have opportunity to identify individual strengths	January 2025 and ongoing	Carri Brown	Positive communication about strengths; team cohesiveness and increased organizational commitment and individual job satisfaction
Tracking of public records requests	January 2025 and ongoing	Rachel Elsea	Efficient and effective responses
Reinforce customer service standards/ report annually on statistics	January 2025 and ongoing	Carri Brown	Common sense of urgency
Provide training on customer service topics	Annually and within Monday Morning Meetings	Carri Brown	Collective understanding of customer service expectations
Encourage use of Bravos and GEMS	Annually 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; continue to recognize the weekly "wins"	Monday Morning meetings	All Team Members	Improved understanding of and commitment to internal and external customer service
Develop an office wide calendar – a list of significant dates	For 2025 and annually	Rachel Elsea	Improved planning and participation in events
Review and document TIRC processes, conduct cross training and help entities establish schedules; open meeting documentation	2025 and ongoing	Rachel Elsea and Carri Brown	Increased connections with economic development; transparency of multi-jurisdictional activity; website updated; open meeting procedure updated
Develop job shadowing for team members as requested; include other departments who have expressed interest, such as DD; continue internal training and connections with the Finance Department; document year end processes	2025 and ongoing	All Team Members; Payroll – Jen Dickerson, Michelle Wright, Jessica Ferguson, Kit Burley, Jojo Harmon	Improved organizational knowledge and team cohesiveness; improved ability to cover for planned absences

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Continue Finance cross training, especially with financial reporting, Budget Commission and TIRC governance	2026 -2030	Angel Horn, Mesina Clark, Amanda Rollins	Improved organizational knowledge
Plan training and observations of year-end processes	2025-2030	Meagen Bowland and Lori Hampshire with Mesina Clark and Kayla Speakman	Improved organizational knowledge
Coordinate REA and Settlement and Administration efforts for the establishment of tax rates and year end processes with the state of Ohio	2025-2030	Amanda Rollins, Josh Harper, Angel Horn, and Noel Soddors	Improved organizational knowledge and quality assurance
Communicate about inventory assignments; update depreciation schedules if needed	2025 and annually	Angel Horn and Beverly Hoskinson	Better time management and support of financial officers
Update the Internal Control Manual; monitor and continue to develop Wednesday Word to the Wise for communications	2025 and ongoing	Bev Hoskinson, Rachel Elsea, and Angel Horn	Improved organizational knowledge and internal control; ongoing tips provided
Update the Continuity of Operations Plan for Financial Systems and Real Estate Assessment; Update ASAP plans as needed	2025 and ongoing	David Burgei and Bev Hoskinson	Improved service and ability to respond to emergencies; REA exercises held
Meet deadlines for sexennial update planning	2025 and ongoing	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	2025-2030	Jen Dickerson, Michelle Wright, Beverly Hoskinson	A list of work groups with participants is available and communicated each Monday
Continue Happiness Project/Culture Champion projects	2023 and ongoing	Michelle Wright, Jessica Ferguson, and Stacy Knight	Design at least 2 ways to support those struggling w/ homelessness, recovery, or poverty; volunteered for recovery and Habitat for Humanity; Volunteered for MOW & United Way; Christmas projects completed
Focus on financial reporting strength to add value to Fairfield County by continuing MCJDC services with the costs of services recognized	2025 and throughout MCJDC contract period	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
Ensure CAUV process is documented well and there is training in place for staff to support the agricultural community	2025-2030	Greg Forquer, Makala Finley, Crystal Walker, Josh Harper	New fact sheets were completed by the end of 2024; there is a calendar organized with deadlines for 2025 going forward
Develop two-week onboarding process for newly hired employees, with templates; increase training opportunities	2025 and ongoing	Managers	All employees will feel welcome and will have training opportunities
Clarify all public records and open meeting practices; take Sunshine Law training	2026 and ongoing	Carri Brown and Rachel Elsea & all team members	Policy clarified and posted as well as sent to media and placed online; training to be 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.

<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	2025 and ongoing	Rachel Elsea and team members	Improved civic education and outreach
Develop a plan for speaking engagements (more than 50 were conducted in 2024); participate in Rotary civic groups to share information and receive community information; participate in Chamber events, such as the educational events about the US Constitution	2025-2030	Rachel Elsea and Carri Brown	Improved civic education and outreach
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	2025	Rachel Elsea and others	Revised BOR related videos as part of the sexennial update communication plan
Attend at least one of each township meetings throughout the period; issue communications to support entities; attend other entity meetings; survey stakeholders about training	2025-2030	Carri, Rachel, Amanda, and Managers	Additional outreach and communication; multiple communications have been made with townships
Attend county agency board meetings throughout the period	2025-2030	Carri, Rachel, and Managers	Additional outreach and communication
Conduct at least three civic group or school presentations to support workforce	2025-2030	Carri and Rachel	Additional outreach and communication
Refine the communications and social media strategy; attend Chamber sessions about inclusivity, respect, and ethics; participate in DDL efforts for all-accessibility	2025-2030	Rachel Elsea and Managers	Clear understanding of communication goals; increased inclusion and respect; updated videos to include closed captions
Refine team purpose statements and draft a new directory; distribute directory; conduct accessibility review of operations; conduct a REA summit	2025 and ongoing; REA summit in 2027 and 2029	Rachel Elsea	Improved communications; added notary notations for accessibility; conducted training for those with dementia; prepare sensory tools for the public; organize communication for Veterans – conduct REA summits
Prepare for Sunshine Week (annually)	2025-2030	Rachel Elsea and team members	Improved civic education and outreach

**Strategic Plan for the County Auditor's Office**  
**2025-2030**  
**Updated Regularly; Last Updated April 16, 2025**

Prepare at least 12 press releases or op-ed pieces annually on newsworthy topics	2025 and annually	Rachel Elsea and Managers	Improved civic education and outreach
Focus on a specific communication strategy for reappraisal processes and for all stakeholders	2025 and ongoing	Rachel Elsea, Dave Burgei, Josh Harper	Improved civic education and outreach; improved efficiency and transparency
Plan for awareness activities for 50+ accounting professionals in the county; pilot financial leadership academy	2025 and annually	Carri Brown and Bev Hoskinson	Awareness activities were conducted and are ongoing
Plan awareness activities for appraisal professionals and real estate assessment	2025 and annually	Rachel Elsea and Carri Brown	Awareness activities were conducted and are ongoing
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	2025 forward	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	Ongoing	Rachel Elsea and managers	Tracking of service expectations, improvement in outreach
Honor weights & measures expertise and county businesses; create a PSA	2025 and ongoing	Patrick Brighton, Carter Corcoran, and Rachel Elsea	Improved awareness of weights and measures; PSA created in 2024
Create an annual programmatic report and develop a video about services	Annually	Rachel Elsea and Carri Brown	2024 report is available
Ensure Fraud and Risk Management training is taken and communications are made to all departments with the Wed Word to the Wise efforts	Annually or as needed	Rachel Elsea and Bev Hoskinson	Improved understanding of risk management
Create outreach and/or roundtable opportunities for townships and corporations	2028-2030	Angel Horn & Amanda Rollins	Procedures for Vendor Self Service are under review
Specifically promote the new property tax exemptions available for pre-residential property	2025-2026	Rachel Elsea	A new process needs to have extra communication to the public for awareness
Plan recognition of community stakeholders	2025-2030	Rachel Elsea and Carri Brown	Improved connections and support of stakeholders
Develop virtual notary options to expand services for the public; communicate options	2028-2030	Rachel Elsea	Additional services for the public and stakeholders
Prepare a rapid response communication plan along with the communications strategic plan	2026-2030	Rachel Elsea	Better ability to respond for the public
<b>COMMENTS</b> The above task list is not inclusive of all activities.			

**Strategic Plan for the County Auditor's Office**  
**2025-2030**  
**Updated Regularly; Last Updated April 16, 2025**

<b>STRATEGIC THEME</b> <b>Improve Use of Technology and Records Processes</b>			
<b>CHAMPION: Dave Burgei</b> <b>WORK GROUP MEMBERS: Managers</b>			
<b>TARGETED OUTCOMES: Improved use of technology and records processes</b>			
Action Step(s)	Review Date	Assigned To	Results
Participate in the Records Commission; review procedures and storage	2025-2030; 2026-2030	Rachel Elsea	Proper records management
Ensure Cybersecurity training is taken; implement 2 factor authentication process	2025-2030	Rachel Elsea and Jen Dickerson	Improved cybersecurity measures
Review improvements of hotel/motel lodging tax collection process; update website	2025-2030	Kayla Speakman and Mesina Clark	Improved use of available technology; better service
Develop the DocLink process and training	2025-2026	Bev Hoskinson	Improved efficiency
Focus on Tyler Technology monitoring; improve understanding of ERP and EAT	2025 and ongoing	Angel Horn, Josh Harper, & Team	Improved use of available technology
Review websites for ADA compliance; update county building tour	2025 and ongoing	Rachel Elsea & GIS Team	Improved access to online information for residents
Plan contract renewals for enterprise systems	2027	Directors	Improved monitoring and services
Update Finance and REA disaster plan recovery plans, focusing on management letter tasks	2025-2030	Bev Hoskinson and Work Group	Work group activities assigned; quarterly testing done
Support the Sheriff, Transit, Engineer, Board of Elections, HRCO, SWCD, Fire Chiefs, & others	2025 and ongoing	GIS Team & ERP Group	Improved use of available technology; continuous updates
Implement new process for address changes; manager Tyler updates, such as with TIFs	2025-2030	Josh Harper & Noel Soddors	More convenient public services; greater efficiency for staff
Develop an electronic process for lot splits in support of housing and economic developments	2025-2030	Dave Burgei and Team	Improved service and understanding for the public
Share information learned with Tech Cred	2025-2026	Managers	Improved competencies
Develop workgroups with Treasurer	2025-2030	Noel Soddors & Bev Hoskinson	Improved knowledge & coordination
Implement an online scheduling system	2025-2030	Crystal Walker and Makala Finley	Improved efficiency for the public
Improve ERP governance, involving stakeholders; update deduction structure for HR benefit administration and employees	2026-2030; 2025	Bev Hoskinson	Refreshed governance committee and more efficient processes
Develop AI policy and examine tools; develop at least two new initiatives; ensure security	2026-2030	Carri Brown and Directors	We are now using AI for REA & lodging tax collections.
Continue electronic processes for conveyance; evaluate for improvements	2025-2030	Julie White, Lori Kidder, & Heidi Hamilton	Improved services and efficiencies
Develop a long-term list of technology and asset requirements for replacement	2025 and annually	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***

An initial plan was presented for input and feedback in January 2022. The plan was provided to stakeholders in 2022, and in 2023, once updated, it was provided again. It has been provided to major stakeholders at least quarterly since that time. 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.

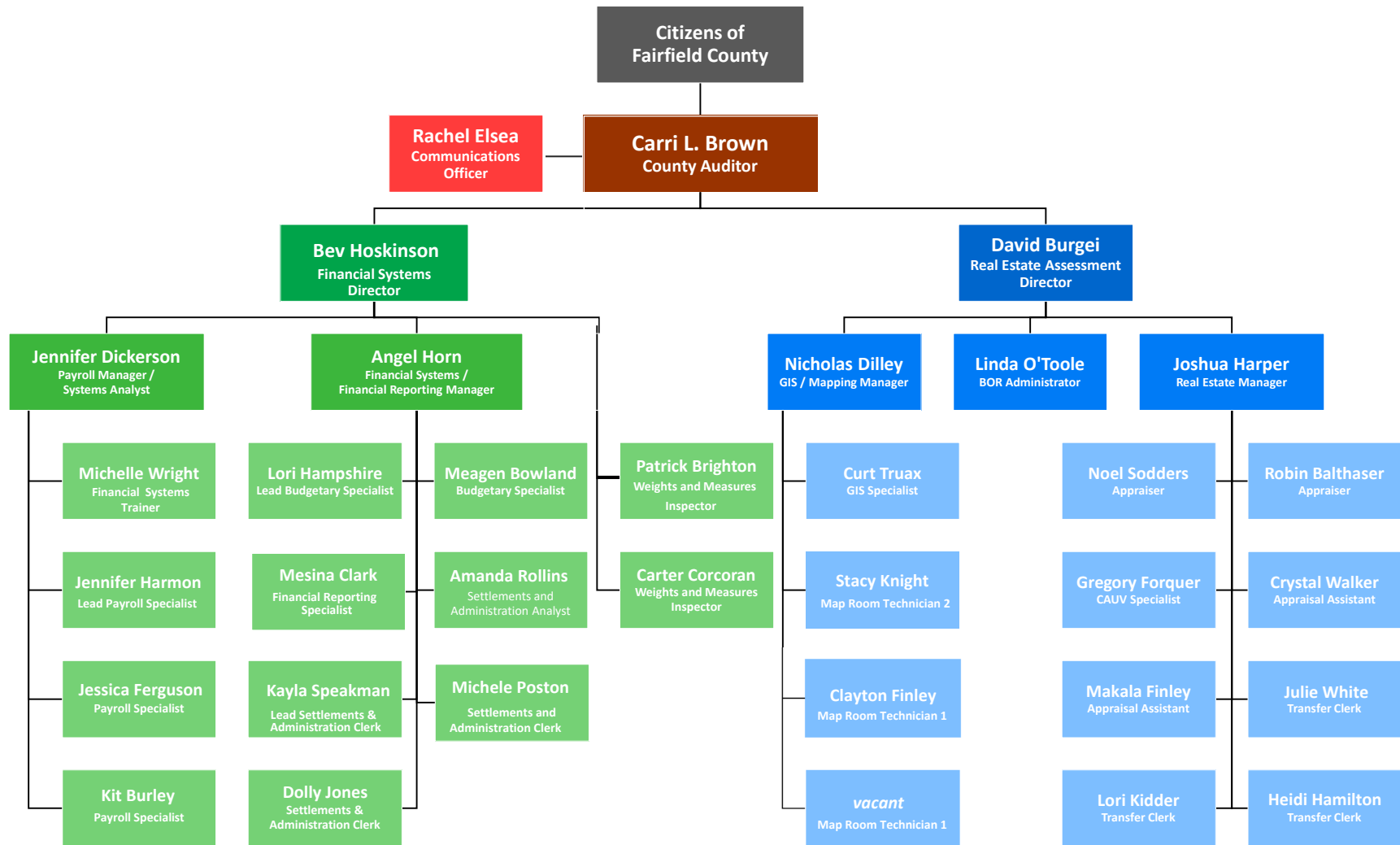
In addition, feedback and input was sought from multiple stakeholders by email and in person. There is an expectation of ongoing ways to obtain input and feedback. The plan is on the website and is announced in social media platforms

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

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
- Year in Review
- Code of Ethical Conduct



32.875 FTE on Auditor TO  
.10 FTE on Prosecutor TO  
33 positions when full  
0 vacancies

**For Auditor Use**  
38.9% General Fund  
61.1% REA Fund

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



**32.875**  
FULL-TIME  
EMPLOYEES

**< 33.875**  
2.5 full-time  
employees fewer  
than three years ago

**39%**  
of employee salaries  
are supported by the  
**General fund**



**61%**  
of salaries are supported  
by the **Real Estate  
Assessment fund**

**100%**

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



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

**50%**

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

**94%**

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



COUNTY AUDITOR EMPLOYEES ARE  
**highly trained, skilled, and experienced.**  
And 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  
Senior Hub  
Chamber of Commerce  
Rotary Clubs  
The Masons  
Moose Lodge  
Eagles

Pink Hope Society  
Fairfield Medical Center TWIGs  
Lancaster Ohio Biker Club  
Charity Newsies  
Red Cross  
Lancaster Festival  
Destination Downtown Lancaster

## CONTACT US!

740-652-7020 • [co.fairfield.oh.us/auditor](http://co.fairfield.oh.us/auditor) • [Twitter](#) FairCoAuditor • [Facebook](#) FairfieldCountyAuditor • [Instagram](#) FairCoAuditor • [LinkedIn](#) fairfield-county-auditor

<b>RESPONSIBILITY</b> Robin (3) Meagen (4) Angel (1) Lori H (1) Michelle (3) Rachel (5) Nick (1) Jessica (1) Stacy (4) Linda (5) Heidi (2) Bev (3) Kit (4) Amanda (3) Clayton (3) Dolly (4)	<b>ACHIEVER</b> Carri (3) Makala (1) Robin (2) Angel (4) Noel (1) Josh H (1) Crystal (1) Stacy (3) Bev (5) Kit (2) Kayla (2) Clayton (2) Dolly (5)	<b>HARMONY</b> Patrick (1) Meagen (5) Nick (3) Stacy (1) Lori K (3) Julie (1) Jessica (3) Michele (5) Kayla (5) Mesina (4)	<b>CONSISTENCY</b> 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 (2)	<hr/> <b>IDEATION</b> Josh H. (4) Bev (4)
<b>DELIBERATIVE</b> Rachel (1) Nick (2) Curtis (4) Greg (2) Dave B. (1) Mesina (3)	<b>POSITIVITY</b> Patrick (4) Angel (5) Crystal (3) Lori K (2) Julie (5) Mesina (5) Dolly (2)	<b>LEARNER</b> Carri (4) Jen (4) Nick (4) Robin (1) Josh H (5) Crystal (4) Jennifer (2) Kit (1) Amanda (5)	<b>EMPATHY</b> Lori K (1) Julie (4) Meagen (1) Michelle (4) Curtis (3) Stacy (2) Makala (4) Jennifer (3) Amanda (4) Dolly (1)
<b>DEVELOPER</b> Makala (3) Angel (3) Jen (2) Lori K (4) Randy (1) Heidi (5) Bev H. (1) Michele (1) Dolly (3)	<b>RELATOR</b> Greg (5) Patrick (3) Stacy (3) Jessica (5) Angel (2) Rachel (4) Curtis (5) Linda (3) Amanda (2) Kayla (4) Clayton (4) Mesina (1)	<b>INPUT</b> Carri (5) Greg (4) Jen (5) Robin (4) Crystal (2) Kit (5)	<b>BELIEF</b> Josh H. (3) Rachel (2) Mesina (2)
			<hr/> <b>RESTORATIVE</b> Makala (2) Heidi (3) Michele (4) Amanda (1) Clayton (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) Michele (3)	<b>COMMUNICATION</b> Noel (4) Lori H (5) Michelle (2)	<b>STRATEGIC</b> Carri (2) Noel (2) Rachel (3) Carter (5)
<b>INCLUDER</b> Julie (2) Meagen (3) Lori K (5) Lori H (3) Jen (1)	<b>CONNECTEDNESS</b> Jen (3) Linda (2) Michele (2)	<b>FUTURISTIC</b> Robin (5) Kayla (3)	<b>CONTEXT</b> Patrick (5) Greg (1) Carter (1) Kayla (1)
		<hr/> <b>SELF ASSURANCE</b> Noel (3)	
<b>INTELLECTION</b> Makala (5) Crystal (5) Jennifer (4)	<b>ADAPTABILITY</b> Patrick (2) Curtis (2) Jessica (2) Carter (4) Heidi (1)	<b>DISCIPLINE</b> Dave B (3) Jennfier (5) Kit (3)	<b>WOO</b> Noel (5) Lori H (4) Michelle (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>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>Kayla</b>	Context, Achiever, Futuristic, Relator, Harmony
<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>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>Clayton</b>	Restorative, Achiever, Responsibility, Relator, Arranger
<b>Dolly</b>	Empathy, Positivity, Developer, Responsibility, Achiever
<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
<b>Mesina</b>	Realtor, Belief, Deliberative, Harmony, Positivity

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.

**165,360** POPULATION → **3** CITIES | **13** TOWNSHIPS | **12** VILLAGES

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



**287.3 M**  
Capital assets



**74,000+**  
Parcels



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

### DID YOU KNOW?

Fairfield County unemployment and poverty rates are below state average.



**28,764**  
Checks/EFTs issued



**445**  
Vendor licenses issued



**6,720**  
Properties conveyed  
annually

Modernized Minimum Conveyance Standards

### DID YOU KNOW?

**70%**  
Conveyances  
processed  
electronically

**19,547**  
Dog licenses  
issued

**\$5.94B+**  
Total county-  
wide assessed  
valuation

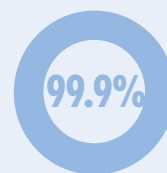
**112,016**  
Registered  
voters

**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.

**800**  
Surveys  
collected

**433**  
Address  
changes  
made online

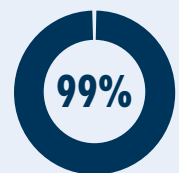
### Of the Participants Surveyed...



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



**10,117**  
Water bottles saved



Hotel/motel tax  
tech improvements

Fairfield County has the lowest sales tax rate in the region

### DID YOU KNOW?

**4,950**  
Social media  
followers

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

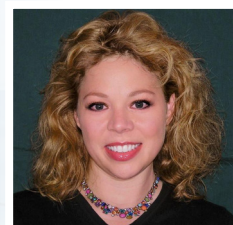
**45**  
BOR  
hearings held

**45+**  
Press releases  
issued

Data current as of November 2024

**"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) • [Facebook](https://www.facebook.com/FairCoAuditor) • [Instagram](https://www.instagram.com/FairCoAuditor) • [LinkedIn](https://www.linkedin.com/company/fairfield-county-auditor) • [fairfield-county-auditor](https://www.fairfield-county-auditor.com)

# 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				
<p><b>Accomplishments:</b></p> <ul style="list-style-type: none"> <li>✓ All-staff touch-base meetings</li> <li>✓ All-staff survey</li> <li>✓ Position description updates</li> <li>✓ In-services re: referrals and annual retreats</li> <li>✓ Issued an office Code of Ethical Conduct</li> <li>✓ Request by CAAO to create and host leadership conferences</li> </ul> <p><b>Training/Development:</b></p> <ul style="list-style-type: none"> <li>✓ Mid-term and annual performance assessments</li> <li>✓ 1:1 meetings: Time with the County Auditor Initiative</li> <li>✓ In-services and annual retreats</li> <li>✓ Team building and recognition activities</li> <li>✓ Strengths assessments</li> <li>✓ Individualized, goal-setting coaching sessions</li> <li>✓ Performance assessment activities supervisor training</li> <li>✓ Received tech-credit grants</li> <li>✓ Celebrate Women &amp; Leadership Summit</li> <li>✓ Members of AGA, GFOA, and CPIM - attend multiple seminars and led conferences</li> </ul> <p><b>Awards:</b></p> <ul style="list-style-type: none"> <li>✓ Developed a traveling trophy award: The Excellence Project</li> </ul>	<p><b>Accomplishments:</b></p> <ul style="list-style-type: none"> <li>✓ Championed customer service standards</li> <li>✓ Happiness Project to increase community engagement and build upon individual strengths</li> <li>✓ Honored those with exceptional Weights &amp; Measures practices</li> <li>✓ Inventory assignments for efficiency and to support internal customers</li> <li>✓ Continuity of operations plans</li> <li>✓ Documented open meeting procedures for the TIRCs, BOR, and Budget Commission</li> <li>✓ Met all deadlines for payroll and financial reporting</li> <li>✓ Conducted outreach with associations and the general public (more than 60 presentations conducted)</li> <li>✓ Provided same-day legal review for lot splits</li> </ul> <p><b>Training/Development:</b></p> <ul style="list-style-type: none"> <li>✓ Record 98% CAUV apps returned prior to deadline</li> <li>✓ Created lot splits factsheet to help with house development</li> <li>✓ Conducted internal trainings</li> <li>✓ Two-week onboarding training for new employees</li> <li>✓ Conducted customer surveys</li> <li>✓ Developed Lot Split Application</li> <li>✓ Developed DocLink for Settlements</li> </ul> <p><b>Awards:</b></p> <ul style="list-style-type: none"> <li>✓ NACO Achievement Award for Board of Revision services and statewide references</li> </ul>	<p><b>Accomplishments:</b></p> <ul style="list-style-type: none"> <li>✓ 300 visitors to REA building during Tour of Homes</li> <li>✓ Hosted Real Estate Summit</li> <li>✓ Partnered with OSU Ext. for landscaping project</li> <li>✓ Public records request response: one-day average</li> <li>✓ Website inquiry response: one-day average</li> <li>✓ Tripled social media presence</li> <li>✓ Updated office directory with purpose statements and contact information</li> <li>✓ Monthly newsletter for internal and external customers</li> <li>✓ 60+ news releases distributed, (Up from 0 in 2021)</li> <li>✓ Proclamations for accounting/appraising skill awareness, GIS, W&amp;M</li> <li>✓ Multiple Auditor fact sheets and videos</li> <li>✓ Updated websites to provide more information for the public</li> <li>✓ Served as subject matter experts to other counties</li> </ul> <p><b>Training/Development:</b></p> <ul style="list-style-type: none"> <li>✓ Attended township, school district, and other entity meetings</li> <li>✓ Conducted all access training</li> <li>✓ Conducted ethics training</li> <li>✓ Conducted mental health first aid training</li> <li>✓ Partnered with Ohio Prisons for workforce training</li> <li>✓ Conducted fraud/risk management training</li> </ul>	<p><b>Accomplishments:</b></p> <ul style="list-style-type: none"> <li>✓ GIS partnership with public safety to improve response times</li> <li>✓ New informal hearing electronic scheduling option</li> <li>✓ Electronic signature process</li> <li>✓ Electronic option for the conveyance of property, now used more than 70% of the time</li> <li>✓ Map of the Month initiative</li> <li>✓ New monitoring tool for financial systems technology</li> <li>✓ Participated in Records Commission</li> <li>✓ Reviewed websites for ADA-compliance</li> <li>✓ Maintained current technology for GIS users, including multiple county entities</li> <li>✓ Managed software as a service function for financial systems to reduce down time</li> </ul> <p><b>Training/Development:</b></p> <ul style="list-style-type: none"> <li>✓ Participated in county-wide IT group</li> <li>✓ Cybersecurity training for team</li> <li>✓ Implemented AI for improved motel lodging tax collections to benefit tourism</li> </ul> <p><b>Awards:</b></p> <ul style="list-style-type: none"> <li>✓ GIS received 1<sup>st</sup> place in the statewide Analytic Mapping Contest</li> <li>✓ GIS showing leadership in statewide workgroup to improve digital parcels</li> </ul>	<p><b>Accomplishments:</b></p> <ul style="list-style-type: none"> <li>✓ Intentional in-reach strategies to help internal customers</li> <li>✓ Fact sheets to support local school districts and libraries</li> <li>✓ New capitalization threshold and depreciation</li> <li>✓ Waived requirements for Budget Commission formal hearings</li> <li>✓ Participated in multiple work groups to improve countywide services</li> <li>✓ Improved technology deliverables</li> <li>✓ Contract monitoring tool</li> <li>✓ Civic education tools for real estate assessment; three videos</li> <li>✓ Updated Internal Control Manual</li> <li>✓ Informal hearings</li> <li>✓ Appraisal and new construction notices</li> <li>✓ Minimum standards for conveyance of property</li> <li>✓ Conduct of TIRC meetings, established website presence</li> <li>✓ Efficiency of Board of Revision processes</li> </ul> <p><b>Training/Development:</b></p> <ul style="list-style-type: none"> <li>✓ New GASB Standards</li> <li>✓ Payroll training activities, inter- and intra-departmentally</li> <li>✓ Payroll onboarding processes</li> </ul> <p><b>Awards:</b></p> <ul style="list-style-type: none"> <li>✓ Excellence Awards for Financial and Popular Reporting</li> <li>✓ Auditor of State Award with Distinction</li> </ul>

## HONORS...

- AGA Excellence in Government Service
- Ohio University Recognition of Distinction
- DD Partner of the Year
- Jane Johnsen Award
- Floyd Wolfe Award
- CLE Commission
- Community Choice Employer of the Year
- USA Today Top Employer
- 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!