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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.

| <i>Summary of SWOT Analysis</i>   |   |
|---|---|
| <b>Strengths</b> <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> | <b>Weaknesses</b> <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**

- Potential to engage other entities in strategic reviews; potential to engage more associations and legislators
- Growing county offers stability as well as pressures for more services
- Relatively stable economy with a healthy financial position of the county
- Ongoing reviews of processes will allow for improvements and new technologies, such as with DocLink and the lot split application
- Improvements in communications and continued increased use of social media platforms
- Additional training is welcome - internally and externally; requirements for training of risk management and fraud, ethics, and unlawful harassment have been met with positivity
- Communication of BOR processes and leadership on a statewide basis to help with understanding about BOR processes
- Updates for manuals and desk aids, especially for activities within settlements and administration
- New property tax exemption opportunities for pre-residential properties
- Recommendations for the legislators to support property tax relief

**Threats**

- Uncertainty in the economy, especially mid-long term
- Increasing costs of technology and supply chain disruptions
- Increasing costs of critical contracted services related to technology
- Cybersecurity threats
- Public misinformation and misunderstandings, particularly about BOR or appraisal processes
- Public discontent about increases in valuations arising from market activity (with no impactful legislative changes in place at the state level to truly ease the burden of property taxes)
- Labor shortage (internal and external aspects)
- Exponentially increasing need for new technological competencies
- Complexities of artificial intelligence initiatives
- Increased fraud in all sectors

### ***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 significant change at the sexennial update). Adjustments always vary between neighborhoods as they are based on market conditions.

The Fairfield County Auditor's Office performed 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 2026.

The next triennial update is scheduled for 2028; however, it could be altered to 2029 based on changes the state of Ohio may make. In addition, property tax relief reform (passed in 2025) will alter the effect of appraisal updates on taxation, likely limiting the increases in taxation to inflation, but for voted changes.

## *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, especially for property tax relief reform
- 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.*

| <p><b>STRATEGIC THEME</b><br/> <b>Provide Supervisory Support &amp; Coaching Opportunities for Team</b></p>   |  |                             |   |
|---|--|-----------------------------|---|
| <p><b>CHAMPION:</b> Carri Brown<br/> <b>WORK GROUP MEMBERS:</b> Supervisors and Managers</p>  |  |                             |   |
| <p><b>TARGETED OUTCOMES:</b> Productivity, Team Cohesiveness, Mission Clarity, Employee Retention, Improved Support Systems; Improved Organizational Health</p> |  |                             |   |
| 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                 | In July 2025, the table of organization was updated and aligned with goals, and the proper use of funds was also reviewed. Goals have been tied to the mission.<br><br>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 annual evaluations occur for all employees  | Interim and annual evaluations have been scheduled for all staff.<br><br>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.   |

**Strategic Plan for the County Auditor's Office  
2025-2030  
Updated Regularly; Last Updated May 2026**

|  |  |   |   |
|--|--|---|---|
| Provide NACo training; ; Apply for tech cred training with input on desired training; support Leadership Summits, as well as Chamber programs; there should be at least two opportunities annually for all employees | Annually, all employees have training opportunities. | Carri Brown   | Leadership is at all levels. All of staff have certificates. More than 40 technical credentials have been obtained.                                     |
| 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; add an in-service about GIS, communications, and leadership; create desk manuals (also in the second theme)                 | At least 4 annually; Desk Manuals updated 2026-2030  | Carri Brown   | In-services were discussed during all-term meetings. Mental health is a focus. GIS was added in July 2025, as was communication and leadership          |
| 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 updates in 2025.   |
| 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; interns were promoted.  |
| Plan for at least one day a week as remote work with requirements to do so, to improve productivity and flexibility  | Annually and ongoing                                 | Directors and Carri   | Ongoing monitoring for effectiveness is in place. Employees report appreciation and retention.  |
| 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  | Stacy Knight, Jessica Ferguson, Michelle Wright, & Kayla Speakman | Recognition (GEMS, certificates) & "Living our Values" trophy is in place. Team participates in volunteer activities.                                   |

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

|   |
|---|
| <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 ERP work group with stakeholder engagement; focus on quality of data sets in order to improve reporting flexibility; create processes for bond reporting and AFIS improvements; address legislation          | 2025 and ongoing                     | Bev Hoskinson, Jen Dickerson, Mesina Clark        | Improved knowledge of ERP; integrated training will continue; communications were developed; more effective use of ERP ; AFIS updated; BBB reviews conducted                      |
| 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, incorporate with Making Numbers Count (also in Strengths and Customer Service)   | 2025                                 | Bev Hoskinson                                     | Improved financial competencies within the county; conducted in 2025  |
| Develop surveys and process for library allocations from the state   | 2025                                 | Carri Brown                                       | Improved Budget Commission processes, consensus achieved through 2030   |
| 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 employee experience   |
| Continue to develop BOR Administrator; define roles for BOR; update rules and regulations; maintain statewide website and reference materials, develop virtual meeting policy  | 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 Mesina Clark       | 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, supporting training in other counties  |
| Review transparency modules (checkbook); ensure State Treasurer has annual information; continue to monitor stakeholders needs   | Annually, 2026-2030                  | Bev Hoskinson                                     | More meaningful access to financial data and understanding or financial processes   |

| <b>STRATEGIC THEME</b>   |  |   |  |
|--|--|---|--|
| Update Processes to Add Value - Continued  |  |   |  |
| <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; develop communication plan for sexennial update  | 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; implement <b>legislation about Budget Commission and taxation, as well as villages</b> ; support modernization of property tax processes & online improvements of Homestead; conduct testimony on 2.2.2026; update EAT for REFORM | 2025/2026/2027 and ongoing (villages through 2030) | Carri Brown, Bev Hoskinson & Amanda Rollins & REA TEAM                    | Increased efficiency; we need to be engaged with associations and legislators; process changes may be required; we support property tax relief and reform; we conducted multiple presentations, and reviewed all balances in February; we will work with DTE to update processes and 2 <sup>nd</sup> half tax bill in 2026 |
| Continue to update the Hotel/Motel lodging procedures using AI; document history of the process; request collaboration for any potential changes   | 2025 and ongoing                                   | Mesina Clark 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  |

**Strategic Plan for the County Auditor's Office  
2025-2030  
Updated Regularly; Last Updated May 2026**

|  |                      |   |  |
|--|----------------------|---|--|
| Prepare documentation and training for fuel card and vendor card policy  | 2025                 | Rachel Elsea and Directors  | Improved internal control; documented procedures   |
| Create a CAUV map that includes known solar leases; update that map annually   | 2025                 | Carri Brown and GIS Team  | Improved organizational knowledge  |
| Improve the creation of the federal schedule; ensure all county 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; build connections with law enforcement and workforce development  | 2025 and ongoing     | Dave Burgei and Curt Truax, and GIS team                          | Improved use of GIS tools; improved recruitment, retention and recognition; 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 pilots   |
| Monitoring of REA related contracts; strengthening TIF and assessment knowledge for Economic Development; improve financial structures in a proactive way  | 2025 and ongoing     | Dave Burgei; Noel Sadders and Josh Harper; Bev Hoskinson and Team | 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     | Admin team  | Efficient operations; review for adjustments   |
| Ensure ongoing reconciliation of fiduciary funds   | 2025 and annually    | Jen Dickerson   | Improved financial reporting and auditing  |
| Participate in statewide discussions about legislation; planning CAAO meetings in Fairfield County; monitor recommendations about property taxes; develop communications and advocacy for relief | 2025-2030            | Carri Brown   | Prepared Q/A for CAAO brochure; reached out to legislators; attended legislative events; developed fact sheets; CAAO meetings and training held in Fairfield; leading communications |
| 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 dog licensing process; implement DocuPet in 2025   | 2025 and annually    | Kayla Speakman & Michele Poston                                   | Updated procedures in 2025; evaluation to come   |
| Issue RFPs for required updates; let contract; monitor contract; prepare communication plan  | 2025/2026; 2028/2029 | 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>  |   |   |   |
| <b>Action Step(s)</b>  | <b>Task Completion / Review Date</b>        | <b>Assigned To</b>  | <b>Results</b>  |
| Communicate individual strengths focus; conduct assessment to identify individual strengths and compile helpful notes for supervisors and employees; 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; Work on 2026 deadlines with DTE   | For 2025 and annually                       | Rachel Elsea; Dave Burgei   | Improved planning and participation in events; <i>compliance with DTE</i>   |
| 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   |

**Strategic Plan for the County Auditor's Office**

**2025-2030**

**Updated Regularly; Last Updated May 2026**

|  |   |  |   |
|--|---|--|---|
| Continue Finance cross training, especially with financial reporting, Budget Commission and TIRC governance  | 2026 -2030                                | Mesina Clark, Amanda Rollins   | Improved organizational knowledge   |
| Plan training and observations of year-end processes; plan and conduct internal and stakeholder training   | 2025-2030                                 | Finance Team   | 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, Noel Soddors, Kayla Speakman & Mesina Clark | Improved organizational knowledge and quality assurance   |
| Communicate about inventory assignments; update depreciation schedules if needed   | 2025 and annually                         | 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 Finance Team                            | 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; hold informal meetings   | 2025 and ongoing                          | David Burgei and Josh Harper   | Monthly meetings to show the process is on track; more than 1K meetings held with the public  |
| 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, volunteered for recovery and Habitat for Humanity; Volunteered for MOW & United Way; Christmas projects |
| Focus on financial reporting strength to add value to Fairfield County by continuing MCJDC services with the costs of services recognized; support additional political subdivisions | 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 & others                            |
| 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; Develop internal HR practices with documentation                     | 2025 and ongoing                          | Managers & Rachel Elsea  | 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 as well as sent to media and placed online; training 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 THEME**

**Improve Communication and Outreach**

**CHAMPION:** Rachel Elsea

**WORK GROUP MEMBERS:** All Managers

**TARGETED OUTCOMES:** Improved civic education and outreach

| Action Step(s)  | Task Completion / Review Date                              | Assigned To                                | Results  |
|---|--|--|--|
| Create a newsletter and fact sheets; update website and intranet; build a stronger social media presence; UPDATE all REA pages  | 2025 and ongoing; REA - 2026                               | Rachel Elsea and team members; Dave Burgei | Improved civic education and outreach; improved transparency   |
| 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 weights and measures education and outreach, building on videos and fact sheets prepared for Fair outreach   | 2025; 2026-2028  | Patrick Brighton and Carter Corcoran       | Improved understanding of critical public service  |
| 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; participate in DDL efforts for all-accessibility; refine communications about assessments (ongoing); issue communication about DocuPet   | 2025-2030  | Rachel Elsea and Managers                  | Clear understanding of communication goals; more knowledge in the community about public services and technical information for Finance and REA  |
| Refine team purpose statements and draft a new directory; distribute directory; conduct accessibility review of operations; conduct a REA summit; create property tax charts and participate in common sense work group   | 2025 and ongoing; REA summit in 2027 and 2029; 2026 charts | Rachel Elsea; Carri Brown                  | 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 May 2026**

|   |                       |   |   |
|---|-----------------------|---|---|
| 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             | 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 May 2026**

| <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 and digitization options  | 2025-2030;<br>2026-2030 | Rachel Elsea and Finance Team                              | 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        | Amanda Rollins, Josh Harper, & Team                        | Improved use of available technology                          |
| Ensure ADA compliance; update county building tour; improve data platform for GIS; update REA webpages; update Spanish speaking access                 | 2026, 2027 and ongoing  | Rachel Elsea & Bobby Fagrell and the GIS Team; Dave Burgei | 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  | 2025-2030               | Directors  | Testing done, improved security                               |
| Support the Sheriff, Transit, Engineer, Board of Elections, HRCDD, 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 utility billing process; update deduction structure for HR benefit administration and employees | 2026-2030;<br>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.        |
| Evaluate electronic processes for conveyance, connecting with Recorder's team  | 2026-2030               | <i>Work group lead</i>                                     | 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