FAIRFIELD
COUNTY · OHIO
AUDITOR

2026-2032

STRATEGIC PLAN

FAIRFIELD
COUNTY · OHIO
AUDITOR

2025-2031 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.

SWOT Factors	***Positive***	***Negative***
Internal	Strengths	Weaknesses
External	Opportunities	Threats

Strengths and weaknesses are internal factors, while opportunities and threats are external factors. Strengths and weaknesses mostly focus on the present, while opportunities and threats mostly focus on the future. A SWOT analysis was part of interviews of employees and within multiple meetings of 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.

Summary of SWOT Analysis	
Strengths	**Weaknesses**
• County partnerships • Understanding and use of stakeholder theory • Positive communication • Technical knowledge & competencies • Dedicated leadership • Passionate team members • Purpose-filled work • Connections with county human infrastructure • Structure that brings the ability to tackle problems with multiple partners • Employees who want to make a difference • Outcomes of work are positive, visible, and measurable • Positive relationships with other sectors and multiple entities • Good reputation - with results • Successful audits • GIS technology • Physical space is exceptional • Employees have knowledge of processes and requirements • Strong leadership • Training opportunities • Organizational health, civility • Good organizational structure for problem solving • Updated processes and technological tools • Strong ERP and EAT systems with good staff connections and interfaces and work groups • Knowledgeable and independent weights and measures inspectors • Multiple improved use of technology	• Technology & processes need improved in an ongoing way • Services are not as well known in the community as they could be • Financial officers are ready for additional training and understanding – some departments need support more than others • Formal business processes can be improved • True collaboration is very hard work, involving multiple stakeholders • Processes are complex • Employees feel an increasing amount of stress • There are market pressures that are burdensome to some property owners, adding complexity to required communications about property taxes • Long-term planning requires succession planning and there needs to be more thinking about this topic

Opportunities	**Threats**
• 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, ERP & EAT • 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	• 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 • Labor shortage (internal and external aspects) • Exponentially increasing need for new technological competencies • Complexities of artificial intelligence initiatives • Increased fraud in all sectors • AI created misinformation

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 a***ligned 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.

During our annual retreat in September 2026, the ***Code of Ethics*** was affirmed.

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. Rules and regulations have been updated for the BOR reorganizational meetings, as well.

The next triennial update is scheduled for 2028. 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 meetings in January 2022, 2023, 2024, 2025 and 2026 and have been updated regularly, as well. In September of 2026, the themes and activities were refreshed to look ahead as much as possible through 2032. Stakeholder and employee input was sought. There are regular updates during public meetings, as well. The strategic plan is a working document that is *posted on the County Auditor's website and within social media platforms.*

STRATEGIC THEME

Provide Supervisory Support & Coaching Opportunities for Team

CHAMPION: Carri Brown
WORK GROUP MEMBERS: Supervisors and Managers

TARGETED OUTCOMES: Productivity, Team Cohesiveness, Mission Clarity, Employee Retention, Improved Support Systems; 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	In 2026, 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. 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. 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	2026 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 were some building upgrades in 2025 based on the recommendations of subject matter experts.

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 will 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 2026-2032	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.
Conduct an analysis for succession planning	2027-2030	Carri Brown and Directors	Stability of services
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.
Provide stress relief activities during Monday Morning Meetings	2026 and ongoing	Carri and Managers	Employees will feel supported by supervisors
Explore creations of a local IAAO chapter	2027	Josh Harper and Noel Sodders	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.	2026-2032	Jess Ferguson, Bobby Fagrell, Michelle Wright, Crystal Walker, Kami Neal & Makala Finley	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.			

STRATEGIC THEME

Update Processes to Add Value

CHAMPIONS: Directors and Managers
WORK GROUP MEMBERS: All team members with subgroups defined by function

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

Action Step(s)	Task Completion / Review Date	Assigned To	Results
Develop ERP work group with stakeholder engagement; focus on quality of data sets to improve reporting flexibility; create processes for bond reporting and AFIS improvements; address legislation	2026 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)	2026 and ongoing	Bev Hoskinson	Improved financial competencies within the county
Develop surveys and process for library allocations from the state	completed surveys	Carri Brown	Improved Budget Commission processes, consensus achieved through 2030
Focus on onboarding and reconciliations; include a process to connect with onboarding	2026 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	2026 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	2026 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	2026 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, 2026-2032	Bev Hoskinson	More meaningful access to financial data and understanding or financial processes

STRATEGIC THEME

Update Processes to Add Value - Continued

CHAMPION: Directors and Managers
WORK GROUP MEMBERS: All team members with subgroups defined by function

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

Action Step(s)	Task Completion / Review Date	Assigned To	Results
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	2028 and 2032	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	2026 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	2026 and ongoing	Linda O'Toole, Crystal Walker, Makala Finley, Noel Soddders, & Josh Harper	Improved knowledge about process for the public and stakeholders; updated daily; procedures were reviewed
Develop reasonable estimates of revenues; update process with DocLink technology; plan monthly meetings as needed;implement **legislation about Budget Commission and taxation, as well as village operations**; supporting modernization of property tax processes & *online improvements of Homestead exemption;* conduct testimony on 2.2.2026; update EAT for reform phases	2026/ 2027 and ongoing (villages through 2030/2032)	Carri Brown, Bev Hoskinson & Amanda Rollins, Josh Haper, & 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 2nd half tax bill in 2026; successfully implemented HB 186
Continue to update the Hotel/Motel lodging procedures using AI; document history of the process; request collaboration for any potential changes	2026 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	2026 and ongoing	Dave Burgei and GIS Team	Improved safety services; good partnerships

Prepare documentation and training for fuel card and vendor card policy	2026 and ongoing	Rachel Elsea and Directors	Improved internal control; documented procedures
Improve CAUV fact sheets	2026	Rachel Elsea and Makala Finley	Fact sheets are in place; good communication for CAUV participants
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	2026 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	2026-2032	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 and the Parks District	2026 and ongoing	Dave Burgei and Curt Truax, and GIS/mapping team	Improved use of GIS tools; understanding of services provided; Park maps for residents; stakeholder services improved
Monitoring of Financial Systems contracts, implement new grant reporting module	2026 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	2026 and ongoing	Dave Burgei; Noel Sodders and Josh Harper; Bev Hoskinson	Improved control and quality assurance
Plan for budgeting of fixed assets (gas tank, scanners, folder equipment, laptops, etc.)	2026-2032	Directors	Improved expectations and financial control
Track workload and outcome measures	2026	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	2026 and ongoing	Admin team	Efficient operations; review for adjustments
Ensure ongoing reconciliation of fiduciary funds	2026 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	2026-2032	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	2026-2032	Carri Brown	A fact sheet about lessons learned with interns has been prepared.
Continue to monitor dog licensing process; implement DocuPet in 2025; review and update	2026 and annually	Jess Ferguson & Michele Poston	Additional communications made to residents
Let contract; monitor contract; prepare communication plan	2028/2029 2032	Dave Burgei	Quality preparations for required update of values
Improve upon the Excellence Project, with certificates and additional recognition	2026 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.			

STRATEGIC THEME

Focus on Strengths & Customer Service

CHAMPION: Dave Burgei and Rachel Elsea
WORK GROUP MEMBERS: Managers

TARGETED OUTCOMES: Brand of excellence in public service

Action Step(s)	Task Completion / Review Date	Assigned To	Results
Communicate individual strengths focus; conduct assessment to identify individual strengths and compile helpful notes for supervisors and employees; make sure new employees have opportunity to identify individual strengths	January 2026 and ongoing	Carri Brown	Positive communication about strengths; team cohesiveness and increased organizational commitment and individual job satisfaction
Tracking of public records requests	January 2026 and ongoing	Rachel Elsea	Efficient and effective responses
Reinforce customer service standards/ report annually on statistics	January 2026 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 2026 and annually	Rachel Elsea; Dave Burgei	Improved planning and participation in events; *compliance with DTE*
Review and document TIRC processes, conduct cross training and help entities establish schedules; open meeting documentation	2026 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; continue internal training and connections with the Finance Department; document year end processes	2026 and ongoing	Payroll – Jen Dickerson, Michelle Wright	Improved organizational knowledge and team cohesiveness; improved ability to cover for planned absences
Continue Finance cross training, especially with financial reporting, Budget Commission and TIRC governance	2026 -2032	Mesina Clark, Amanda Rollins	Improved organizational knowledge

Plan training and observations of year-end processes; plan and conduct internal and stakeholder training	2026-2032	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	2026-2032	Amanda Rollins, Josh Harper, Noel Sodders, Jess Ferguson & Mesina Clark	Improved organizational knowledge and quality assurance
Communicate about inventory assignments; update depreciation schedules if needed	2026 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	2026 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	2026 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	2026 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	2026-2032	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	2026 and ongoing	Jess Ferguson, Bobby Fagrell, Michelle Wright, Crystal Walker, Kami Neal & Makala Finley	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	2026 and throughout MCJDC contract period	Carri Brown	Best interest of Fairfield County is put forth; *significant savings to the county general fund*; 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	2026-2032	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 going forward
Develop two-week onboarding process for newly hired employees, with templates; increase training opportunities; Develop internal HR practices with documentation	2026 and ongoing	Managers & Rachel Elsea	All employees will feel welcome and will have training opportunities
Consider organizational changes to improve customer service opportunities with Homestead and Settlement, as well as coverage options	2026 and ongoing	Carri Brown	Residents will have improved service; internal stakeholders will have improved timelines
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 newsletter and fact sheets; update website and intranet; build a stronger social media presence; UPDATE all REA pages	REA – 2026 and annually	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	2026-2032	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	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	2026-2032	Carri, Rachel, Amanda, and Managers	Additional outreach and communication; multiple communications have been made with townships
Attend county agency board meetings throughout the period	2026-2032	Carri, Rachel, and Managers	Additional outreach and communication
Conduct at least three civic group or school presentations to support workforce	2026-2032	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	2026-2032	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; create property tax charts and participate in common sense work group; new REA website	2026 and ongoing; 2026 charts; 2026 website, updates annually through 2032	Rachel Elsea; Carri Brown; Dave Burgei	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; transparency

Prepare for Sunshine Week (annually)	2026-2032	Rachel Elsea and team members	Improved civic education and outreach
Prepare at least 12 press releases or op-ed pieces annually on newsworthy topics	2027 and annually	Rachel Elsea and Managers	Improved civic education and outreach
Focus on a specific communication strategy for reappraisal processes and for all stakeholders	2026 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	2026 and annually	Carri Brown and Bev Hoskinson	Awareness activities were conducted and are ongoing
Plan awareness activities for appraisal professionals and real estate assessment	2026 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	2027 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	2026 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	2028-2032	Amanda Rollins	Procedures for Vendor Self Service are under review
Specifically promote the new property tax exemptions available for pre-residential property	2026, 2027	Rachel Elsea, shifting to REA in 2027	A new process needs to have extra communication to the public for awareness
Plan recognition of community stakeholders	2027-2032	Rachel Elsea and Carri Brown	Improved connections and support of stakeholders
Develop virtual notary options to expand services for the public; communicate options	2028-2032	Rachel Elsea	Additional services for the public and stakeholders
Prepare a rapid response communication plan along with the communications strategic plan	2026-2032	Rachel Elsea	Better ability to respond for the public
COMMENTS The above task list is not inclusive of all activities.			

STRATEGIC THEME
Improve Use of Technology and Records Processes

CHAMPION: Dave Burgei
WORK GROUP MEMBERS: Managers
TARGETED OUTCOMES: Improved use of technology and records processes

Action Step(s)	Review Date	Assigned To	Results
Participate in the Records Commission; review procedures and storage and digitization options	2026-2032	Rachel Elsea and Finance Team	Proper records management
Ensure Cybersecurity training is taken	2026-2032	Supervisors	Improved cybersecurity measures
Review improvements of hotel/motel lodging tax collection process; update website	2026-2032	Kayla Speakman and Mesina Clark	Improved use of available technology; better service
Develop the DocLink process and training	2026 -2032	Bev Hoskinson	Improved efficiency
Focus on Tyler monitoring; improve understanding of ERP and EAT; serve as BETA	2026 and ongoing	Josh Harper Jen Dickerson	Improved use of available technology
Ensure ADA compliance; update county building tour; improve data platform for GIS; update Spanish speaking access	2027 and ongoing; 2028	Rachel Elsea & Bobby Fagrell and the GIS Team; Dave Burgei	Improved access to online information for residents
Plan contract renewals for enterprise systems	ongoing	Directors	Improved monitoring and services
Update Finance and REA disaster plan recovery	2026 – 2032	Directors	Testing done, improved security
Support the Sheriff, Transit, Engineer, Board of Elections, HRCD, SWCD, Fire Chiefs, & others	2026 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	2026-2032	Josh Harper & Noel Sodders	More convenient public services; greater efficiency for staff
Maintain an electronic process for lot splits in support of housing and economic developments	2026-2032	Dave Burgei and Team	Improved service and understanding for the public
Share information learned with Tech Cred	2026	Managers	Improved competencies
Develop workgroups with Treasurer	2026-2032	Noel Sodders	Improved knowledge & coordination
Implement an online scheduling system	2026-2032	Crystal Walker	Improved efficiency for the public
Implement the state's online process for court appointed attorney fees	2027, and forward	Meagen Bowland	Improved efficiency for the public
Improve ERP governance, involving stakeholders; update utility billing process; update deductions	2026-2032; 2026	Bev Hoskinson and Jen Dickerson	Refreshed governance committee and more efficient processes
Develop AI tools; develop at least two new initiatives; ensure security	2026-2032	Carri Brown and Directors	We are now using AI for REA & lodging tax collections.
Evaluate electronic processes for conveyance, connect with Recorder's team; implement state electronic transmissions	2026-2032; 2026 state approvals	*Work group lead ; Josh Harper and Conveyance team*	Improved services and efficiencies
Develop a long-term list of technology and asset requirements for replacement	2026 and annually	Directors	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 special assessments, levies, and Budget Commission processes; issues multiple licenses 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 accuracy and equity, the Real Estate team transfers and appraises real property, administers state programs for owners of agricultural properties to receive tax savings, and manages other exemption programs.

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.

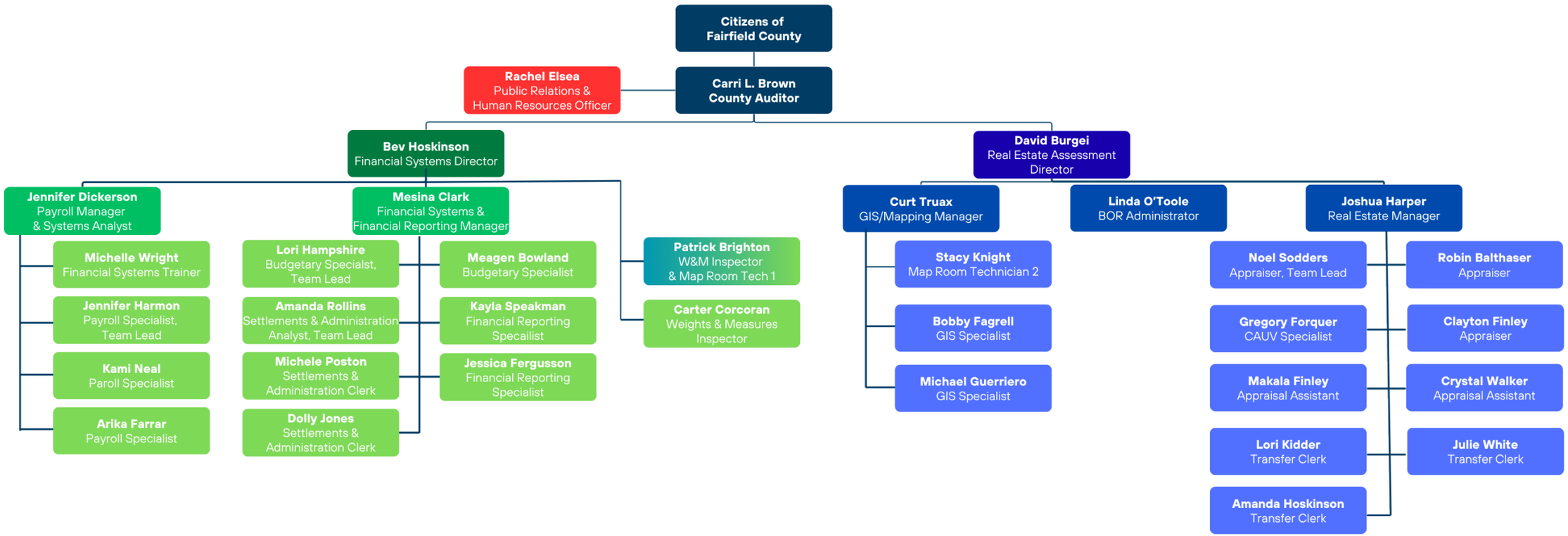
In addition, feedback and input was sought from multiple stakeholders by email and in person. There is an expectation of ongoing ways to obtain input and feedback. The plan is on the website and is announced in social media platforms

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 or (740) 652-7096.

Exhibits

- Table of Organization
- Narrative about the Team
- Individual Strengths
- Year in Review
- Code of Ethical Conduct



32.875 FTEs
63% REA
37% GRF
.10 FTE on Prosecutor TO

As of 4.20.2026

Your Fairfield County Auditor's Office:

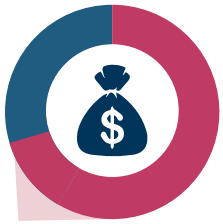
AT-A-GLANCE

FAIRFIELD COUNTY · OHIO AUDITOR

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**

50% have a **bachelor's degree** or higher, which is above the state average of 29.7%

COUNTY AUDITOR EMPLOYEES ARE

highly trained, skilled, and experienced.

And above national and state averages for education and experience

31% have an **associate degree** or two-year certificate within a technical discipline

94% have at least **5 years** of governmental service

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!

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RESPONSIBILITY Robin (3) Meagen (4) Lori H (1) Michelle (3) Rachel (5) Jessica (1) Stacy (4) Linda (5) Bev (3) Amanda (3) Clayton (3) Dolly (4) Kami (3)	**ACHIEVER** Carri (3) Makala (1) Robin (2) Noel (1) Josh H (1) Crystal (1) Stacy (3) Bev (5) Kayla (2) Clayton (2) Dolly (5) Bobby (3) Arika (2)	**HARMONY** Patrick (1) Meagen (5) Stacy (1) Lori K (3) Julie (1) Jessica (3) Michele (5) Kayla (5) Mesina (4) **INDIVIDUALIZATION** Michelle (1) Linda (1) Carter (2) Bev (2) Michael (5)	**CONSISTENCY** Meagen (2) Lori H (2) Curtis (1) Julie (3) Dave B (5) Jennifer (1) **IDEATION** Josh H. (4) Bev (4) **ARRANGER** Clayton (5)
DELIBERATIVE Rachel (1) Curtis (4) Greg (2) Dave B. (1) Mesina (3)	**POSITIVITY** Patrick (4) Crystal (3) Lori K (2) Julie (5) Mesina (5) Dolly (2)	**LEARNER** Carri (4) Jen (4) Robin (1) Josh H (5) Crystal (4) Jennifer (2) Amanda (5) Bobby (5) Arika (3)	**EMPATHY** Lori K (1) Julie (4) Meagen (1) Michelle (4) Curtis (3) Stacy (2) Makala (4) Jennifer (3) Amanda (4) Dolly (1) Michael (1) Kami (4)
DEVELOPER Makala (3) Jen (2) Lori K (4) Bev H. (1) Michele (1) Dolly (3) Bobby (4) Michael (2)	**RELATOR** Greg (5) Patrick (3) Stacy (3) Jessica (5) Rachel (4) Curtis (5) Linda (3) Amanda (2) Kayla (4) Clayton (4) Mesina (1) Michael (3)	**INPUT** Carri (5) Greg (4) Jen (5) Robin (4) Crystal (2) **SIGNIFICANCE** Arika (4)	**BELIEF** Josh H. (3) Rachel (2) Mesina (2) Kami (1) **RESTORATIVE** Makala (2) Michele (4) Amanda (1) Clayton (1) Bobby (2)
MAXIMIZER Carri (1) Dave B. (2) Jessica (4) Carter (3) Kami (2)	**ANALYTICAL** Greg (3) Dave B. (4) Linda (4) Michele (3)	**COMMUNICATION** Noel (4) Lori H (5) Michelle (2) **FOCUS** Arika (5)	**STRATEGIC** Carri (2) Noel (2) Rachel (3) Carter (5) Arika (1)
INCLUDER Julie (2) Meagen (3) Lori K (5) Lori H (3) Jen (1)	**CONNECTEDNESS** Jen (3) Linda (2) Michele (2)	**FUTURISTIC** Robin (5) Kayla (3) Bobby (1) **SELF ASSURANCE** Noel (3)	**CONTEXT** Patrick (5) Greg (1) Carter (1) Kayla (1)
INTELLECTION Makala (5) Crystal (5) Jennifer (4) Michael (4)	**ADAPTABILITY** Patrick (2) Curtis (2) Jessica (2) Carter (4)	**DISCIPLINE** Dave B (3) Jennfier (5) Kami (5)	**WOO** Noel (5) Lori H (4) Michelle (5)

10.20.25

RESPONSIBILITY	RESTORATIVE	DELIBERATIVE	CONSISTENCY
Diligent	Responsive	Careful	Fair
Loyal	Investigative	Conservative	Equal
Driven	Problem-oriented	Sensible	Consistent
Dependable	Weakness-oriented	Thoughtful	Practical
Committed	Unintimidated	Observant	Efficient
Conscientious	Insightful	Vigilant	Predictable

ADAPTABILITY	ACHIEVER	DEVELOPER	EMPATHY
Flexible	Driven	Encouraging	Emotional
Responsive	Diligent	Investing	Expressive
Present	Intense	Helpful	Sensitive
Spontaneous	Independent	Observant	Intuitive
Agreeable	Productive	Patient	Helpful
Easy-going	Self-motivated	Growth-oriented	Confidential

HARMONY	POSITIVITY	DISCIPLINE	BELIEF
Practical	Fun	Timely	Stable
Concrete	Hopeful	Organized	Unchanging
Conflict-reducing	Generous	Efficient	Principled
Collaborative	Enthusiastic	Meticulous	Passionate
Agreeable	Dramatic	Planned	Committed
Task-oriented	Influential	Detail-oriented	Self-sacrificing

RELATOR	ANALYTICAL	IDEATION	STRATEGIC	CONTEXT
Friendly	Objective	Spontaneous	Intuitive	Historical
Caring	Data-driven	Creative	Anticipating	Perceptive
Authentic	Skeptical	Innovative	Thoughtful	Highlighting
Intimate	Questioning	Collaborative	Insightful	Collecting
Genuine	Scientific	Insightful	Option-aware	Studious
Transparent	Dispassionate	Resourceful	Future-oriented	Orienting

ACTIVATOR	INDIVIDUALIZATION	FUTURISTIC	COMPETITION	INCLUDER
Impatient	Unique	Creative	Scorekeeping	Accepting
Dynamic	Aware	Inspiring	Comparing	Tolerant
Initiating	Fair	Anticipating	Winning	Perceptive
Catalytic	Insightful	Imaginative	Measuring	Integrating
Fast	Diverse	Perceptive	Selective	Welcoming
Action-oriented	People-oriented	Future-minded	Driven	Others-oriented

MAXIMIZER	LEARNER	COMMUNICAITON	WOO	INTELLECTION
Quality-oriented	Curious	Talkative	Charming	Introspective
Judging	Interested	Transparent	Outgoing	Solitary
Sorting	Inquisitive	Interactive	Gregarious	Intellectual
Selective	Open-minded	Expressive	Engaging	Reflective
Results-oriented	Studious	Captivating	Initiating	Intense
Excellence-aware	Passionate	Presenting	Socially energetic	Thinking-based

INPUT	SELF-ASSURANCE	COMMAND	CONNECTEDNESS	ARRANGER
Resourceful	Independent	Decisive	Integrating	Flexible
Collecting	Confident	Persuasive	Spiritual	Interactive
Inquisitive	Self-Aware	Intimidating	Comforting	Controlling
Generous	Self-Sufficient	Assertive	Philosophic	Collaborative
Knowledgeable	Persistent	Opinionated	Counseling	Configuring
Investigative	Controlling	Candid	Listening	Resourceful

Carri	Maximizer, Strategic, Achiever, Learner, Input
Robin	Learner, Achiever, Responsibility, Input, Futuristic
Meagen	Empathy, Consistency, Includer, Responsibility, Harmony
Patrick	Harmony, Adaptability, Relator, Positivity, Context
Dave B.	Deliberative, Maximizer, Discipline, Analytical, Consistency
Jen	Includer, Developer, Connectedness, Learner, Input
Rachel Elsea	Deliberative, Belief, Strategic, Relator, Responsibility
Kayla	Context, Achiever, Futuristic, Relator, Harmony
Jessica	Responsibility, Adaptability, Harmony, Maximizer, Relator
Makala	Achiever, Restorative, Developer, Empathy, Intellection
Greg	Context, Deliberative, Analytical, Input, Realtor
Lori H.	Responsibility, Consistency, Includer, Woo, Communication
Josh H.	Achiever, Relator, Belief, Ideation, Learner
Kami	Belief, Maximizer, Responsibility, Empathy, Discipline
Lori K.	Empathy, Positivity, Harmony, Developer, Includer
Stacy	Harmony, Empathy, Relator, Responsibility, Achiever
Noel	Achiever, Strategic, Self-Assurance, Communication, Woo
Curtis	Consistency, Adaptability, Empathy, Deliberative, Relator
Amanda	Restorative, Relator, Responsibility, Empathy, Learner
Arika	Strategic, Achiever, Learner, Significance, Focus
Crystal	Achiever, Input, Positivity, Learner, Intellection
Julie	Harmony, Includer, Consistency, Empathy, Positivity
Michelle	Individualization, Communication, Responsibility, Empathy, Woo
Jennifer	Consistency, Learner, Empathy, Intellection, Discipline
Linda	Individualization, Connectedness, Relator, Analytical, Responsibility
Carter	Context, Individualization, Maximizer, Adaptability, Strategic
Clayton	Restorative, Achiever, Responsibility, Relator, Arranger
Dolly	Empathy, Positivity, Developer, Responsibility, Achiever
Bev Hoskinson	Developer, Individualization, Responsibility, Ideation, Achiever
Michele	Developer, Connectedness, Analytical, Restorative, Harmony
Mesina	Realtor, Belief, Deliberative, Harmony, Positivity
Bobby	Futuristic, Restorative, Achiever, Developer, Learner
Michael	Empathy, Developer, Relator, Intellection, Individualization

The County Auditor's Office brand is **excellence**!

#Serve.Connect.Protect

FAIRFIELD
COUNTY · OHIO

Our Mission

The mission of the **Fairfield 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**.

Our Why Statement

With servant leadership values and community collaboration, the County Auditor's Office provides essential financial reporting and data management to improve accountability, trustworthiness, and credibility in all sectors.

Code of Ethical Conduct

Principle I: People FIRST. We Serve and Support the Public Interest.

Principle II: We Maintain the Highest Standards of Professionalism and Integrity.

Principle III: We Remain Objective in Carrying Out Responsibilities.

County Auditor 2026 Strategic Plan Alignment with Countywide Strategic Pillars

FAIRFIELD
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Provide Supervisory Support & Coaching Opportunities for Team Members

County Auditor Strategic Activities

- **Create updated desk manuals** for Finance, REA/GIS, Employee Onboarding Practices & Communications, Weights and Measures, Settlements, and Licensing.
- Offer at least **2 training opportunities** for each team member.
- Maintain **100% of staff with professional certificate +/or credentials**
- Conduct in-services on **communications & leadership** topics.

Related to County Strategic Theme: F – County Operations (Serve, Connect, Protect)

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Provide Supervisory Support & Coaching Opportunities for Team Members

Alignment Summary:
Strengthening staff skills, leadership, and technical knowledge supports the County's operational excellence goals. By standardizing desk manuals, encouraging certification, and offering individualized coaching, the Auditor's Office enhances efficiency, service quality, and team engagement—key components of effective County Operations (F).

Related to County Strategic Theme: F – County Operations (Serve, Connect, Protect)

FAIRFIELD
COUNTY · OHIO

Update Financial and REA Processes to Add Value

County Auditor Strategic Activities

- Drive **continuous improvements of Doc Link** for multiple political subdivisions.
- Build upon **ERP Data Governance Committee** actions, including updates for utilities billing.
- Strengthen connections with Economic Development to create **proactive financial structures; improve understanding of tools, such as TIFs**.
- Continually improve **BOR (Board of Revision), TIRC (Tax Incentive Review Council), and Budget Commission** processes. **Maintain excellence with ACFR, PAFR, and Mass Appraisals.**
- **Improve Lodging Tax processes and potentially offer new services**.
- Implement workgroups for **additional electronic conveyance and online Homestead options.**

Related to County Strategic Themes: B – Social Services, C – Housing, E – Economic Development

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Update Financial and REA Processes to Add Value

Alignment Summary:
Modernizing and integrating systems ensures equitable resource management across social, housing, and economic sectors. These improvements create efficiencies that strengthen funding reliability for social services (B), support property and housing data accuracy (C), and enable strategic financial planning for equitable economic development (E).

Related to County Strategic Themes: B – Social Services, C – Housing, E – Economic Development

FAIRFIELD COUNTY · OHIO

Focus on Strengths & Customer Service

County Auditor Strategic Activities

- Update the **Internal Control Manual and increase audit readiness**.
- Serve as CFO for Juvenile Detention and **other political subdivisions**.
- Conduct **training for multiple stakeholders & workforce groups; continue to partner with Ohio University**.
- Monitor, promote, and communicate about **property tax relief**.
- Conduct **stakeholder conferences**, Making Numbers Count, Compliance to Confidence, Leadership Training, CAAO training, AGA training, GFOA training, **AOS trainings**, and REA/GIS conferences; serve as volunteer speakers & organizers

Related to County Strategic Themes: B – Social Services, D – Workforce Development, F – County Operations

FAIRFIELD COUNTY · OHIO

Focus on Strengths & Customer Service

County Auditor Strategic Activities

Improved internal controls and stakeholder training foster a culture of accountability and service excellence. By managing finances for key social service programs (B), supporting workforce development and stakeholder education (D), and ensuring strong fiscal management practices (F), the Auditor's Office reinforces trust and efficiency in countywide operations. Ongoing legislative reviews are required for good customer service.

Related to County Strategic Themes: B – Social Services, D – Workforce Development, F – County Operations

FAIRFIELD COUNTY · OHIO

Improve Communication & Outreach

County Auditor Strategic Activities

- Prepare **Weights and Measures educational tools**.
- Conduct **Speakers' Bureau presentations**.
- Provide **expanded assessment and levy information** for the community.
- Use social media for **financial and popular reporting**.

Related to County Strategic Theme: F – County Operations (Serve, Connect, Protect)

FAIRFIELD
COUNTY · OHIO

Improve Communication & Outreach

Alignment Summary:
Open, transparent communication empowers residents and builds public confidence in county government. By providing accessible education materials, clear property assessment information, and digital outreach, the Auditor's Office strengthens community connection and demonstrates accountability consistent with County Operations goals (F).

Related to County Strategic Theme: F – County Operations (Serve, Connect, Protect)

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Improve Use of Technology & Records Management Process

County Auditor Strategic Activities

- Continuously **improve the lot split innovation** using stakeholder theory.
- Update **REA website for greater transparency and access to information**.
- Enhance **GIS data platforms** to support multiple departments and services (911, transportation, road construction, & communities).

Related to County Strategic Themes: A – Infrastructure, C – Housing, F – County Operations

FAIRFIELD COUNTY · OHIO

Improve Use of Technology & Records Management Process

Alignment Summary:
Leveraging technology to improve transparency and data accuracy supports the county's infrastructure and operational excellence.
Updated GIS and REA tools improve decision-making for infrastructure planning (A), enhance housing data systems (C), and promote open, efficient operations (F).

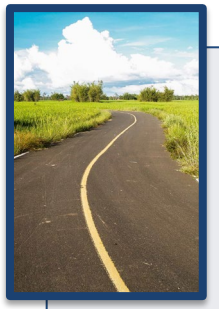
Related to County Strategic Themes: A – Infrastructure, C – Housing, F – County Operations

FAIRFIELD COUNTY · OHIO

Summary Overview

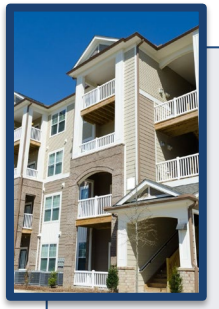
Auditor Priority Area	Key Factors	Related County Strategic Pillars	Overall Contribution
1. Supervisory Support & Coaching	Staff development, leadership, technical expertise	F	Builds skilled teams and promotes efficient, service-oriented operations
2. Update Financial & REA Processes	Process improvement, innovation, fiscal governance	B, C, E	Strengthens financial and assessment systems supporting social services, housing, and economic growth
3. Focus on Strengths & Customer Service	Accountability, financial stewardship, stakeholder engagement	B, D, F	Reinforces social service support, workforce development, and operational integrity
4. Improve Communication & Outreach	Transparency, community education, accessibility	F	Expands engagement & trust in county operations
5. Technology & Records Management	Modernization, transparency, data integration	A, C, F	Enhances infrastructure data, housing accuracy, and operational efficiency

County Pillars



A Infrastructure (Transportation, Utilities, Roads & Bridges)

B Social Services (Services to Support Self-Sufficiency, Mental Health, Addiction Services, and Youth)



C Housing (Affordable Housing & Housing Assistance)

D Workforce Development (Job Training, Skilled Workforce)

E Economic Development (Managing Equitable Growth)

F County Operations (Serve, Connect, Protect)

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Contact Information

Meet the Auditor's Office Staff

https://www.co.fairfield.oh.us/auditor/fc-Auditors-Contacts.html

Email Auditor Brown:

Carri.Brown@FairfieldCountyOhio.gov

FAIRFIELD
COUNTY • OHIO

Your Fairfield County Auditor's Office:

BY THE NUMBERS

FAIRFIELD COUNTY · OHIO AUDITOR

We Serve. We Protect. We Connect.

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

Aa2 BOND RATING | **$250+ Million** ALL FUNDS BUDGET

301.6 M Capital assets

75,600+ Parcels

$76.7M+ New construction assessed

DID YOU **KNOW?** Fairfield County unemployment and poverty rates are below state average.

31,595 Checks/EFTs issued

250 Vendor licenses issued

5,618 Properties conveyed annually

Modernized Minimum Conveyance Standards — DID YOU **KNOW?**

63% Conveyances processed electronically

18,652 Dog licenses issued

$7.3B+ Total county-wide assessed valuation

110,080 Registered voters

Data current as of November 2024

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.

1,352 Surveys collected

592 Address changes made online

Of the Participants Surveyed...

99.9% felt they were able to discuss their specific topic

100% stated they received courteous customer service

99% 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

13,897 Water bottles saved

DocLink, LotSplit, dog license, tech improvements

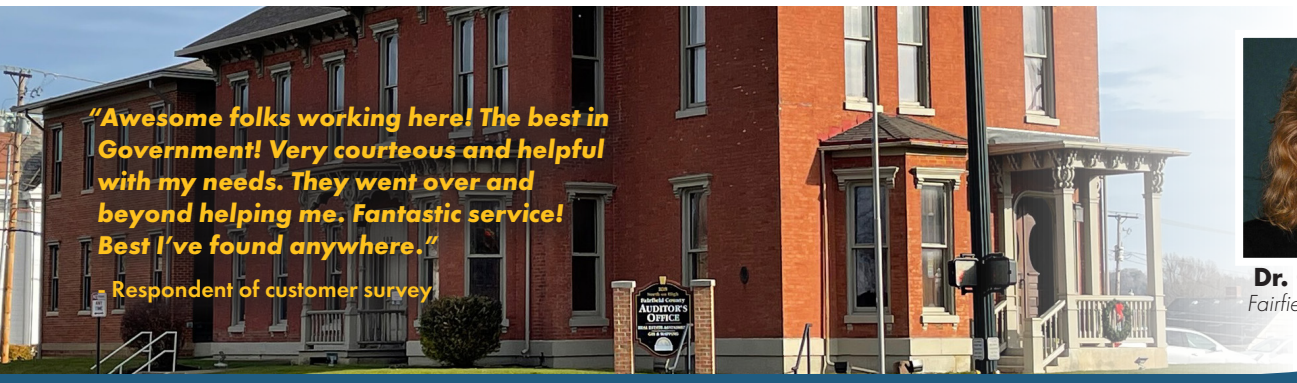
Fairfield County has the lowest sales tax rate in the region — DID YOU **KNOW?**

5,260 Social media followers

< 24 Hours Typical response time for public records requests

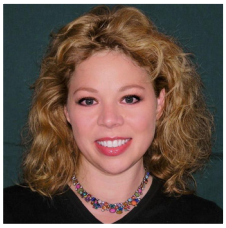
29 BOR hearings held

45+ Press releases issued



"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!

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Your Fairfield County Auditor's Office:

Strategic Plan

FAIRFIELD COUNTY · OHIO AUDITOR

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

GOALS ACHIEVED

Provide Supervisory Support & Coaching Opportunities for Team Members

Accomplishments:
- ✓Held CAAO trainings
- ✓All-staff touch-base meetings
- ✓All-staff survey
- ✓Position descriptions updated
- ✓In-services and annual retreats
- ✓Issued a Code of Ethical Conduct
- ✓Voted Best Workplace

Training/Development:
- ✓1 :1 meetings: Time with the County Auditor Initiative
- ✓In-services and annual retreats
- ✓Team building and recognition activities
- ✓Strengths assessments
- ✓Individualized, goal-setting coaching sessions
- ✓Performance assessment & supervisor training
- ✓Received tech-cred grants
- ✓OU Leadership Summits
- ✓Members of AGA, GFOA, IAAO, and CPIM - attended seminars

Awards:
- ✓Developed a traveling trophy award: The Excellence Project
- ✓OU Community Partner Award

Focus on Strengths & Customer Service

Accomplishments:
- ✓Implemented a new dog tag system
- ✓Championed customer service standards
- ✓Happiness Project to increase community engagement and build upon individual strengths
- ✓Honored those with exceptional Weights & Measures practices
- ✓Inventory assignments for efficiency and to support internal customers
- ✓Continuity of operations plans
- ✓Documented open meeting procedures for the TIRCs, BOR, and Budget Commission
- ✓Met all deadlines for payroll and financial reporting
- ✓Conducted outreach with associations and the public (more than 80 presentations conducted)
- ✓Provided same-day legal review for lot splits

Training/Development:
- ✓Record 98% CAUV apps returned prior to deadline
- ✓Created lot splits fact sheet to help with house development
- ✓Conducted internal trainings
- ✓Two-week onboarding training for new employees
- ✓Conducted customer surveys
- ✓Developed Lot Split Application
- ✓Developed DocLink for Settlements

Awards:
- ✓NACO Achievement Award for Board of Revision services and statewide manual
- ✓GFOA Leadership Award

Improve Communication and Outreach

Accomplishments:
- ✓Expanded personal meeting opportunities for sexennial update
- ✓Drafted multiple white papers and advocated for property tax reform
- ✓300 visitors to REA building during Tour of Homes
- ✓Hosted Real Estate Summit
- ✓Partnered with OSU Ext. for landscaping project
- ✓Public records request response: on the same day on average
- ✓Website inquiry response: one-day average
- ✓Tripled social media presence
- ✓Updated office directory with purpose statements and contact information Monthly newsletter for internal and external customers
- ✓45+ news releases distributed Proclamations for accounting/appraising skill awareness, GIS, W&M
- ✓Multiple Auditor fact sheets and videos
- ✓Updated websites to provide more information
- ✓Served as subject matter experts to other counties

Training/Development:
- ✓Attended township, school district, and other entity meetings
- ✓Conducted all access training
- ✓Conducted ethics training
- ✓Conducted mental health first aid training
- ✓Partnered with Ohio Prisons for workforce training
- ✓Conducted fraud/risk management training

Improve Use of Technology and Records Management Processes

Accomplishments:
- ✓Solidified ERP Governance & engaged all stakeholders
- ✓GIS partnership with public safety to improve response times
- ✓New informal hearing electronic scheduling option
- ✓Electronic signature process
- ✓Electronic option for the conveyance of property used more than 70% of the time
- ✓Map of the Month initiative
- ✓New monitoring tool for financial systems technology
- ✓Participated in Records Commission, improved document imaging
- ✓Reviewed websites for ADA compliance
- ✓Maintained current technology for GIS users, including multiple county entities
- ✓Managed software as a service function for financial systems to reduce down time

Training/Development:
- ✓Participated in county-wide IT group
- ✓Cybersecurity training for team

Awards:
- ✓GIS received 1st place in the statewide Analytic Mapping Contest
- ✓GIS showed leadership in statewide work groups to improve digital parcels

Update Financial and REA Processes to Add Value

Accomplishments:
- ✓Intentional in-reach strategies to help internal customers
- ✓Fact sheets to support local political subdivisions
- ✓New capitalization threshold and depreciation
- ✓Waived requirements for Budget Commission formal hearings
- ✓Implemented DocLink for Budget Commission
- ✓Participated in multiple work groups to improve county-wide services
- ✓Improved technology deliverables
- ✓Contract monitoring tool
- ✓Civic education tools for real estate assessment; three videos
- ✓Updated Internal Control Manual
- ✓Informal hearings
- ✓Appraisal and new construction notices
- ✓Minimum standards for conveyance of property
- ✓Conduct of TIRC meetings, established website presence
- ✓Efficiency of Board of Revision processes

Training/Development:
- ✓New GASB Standards
- ✓Payroll training activities, inter-and intra-departmentally
- ✓Payroll onboarding processes

Awards:
- ✓Excellence Awards for Financial and Popular Reporting
- ✓Auditor of State Award with Distinction

HONORS...

- AGA Excellence in Government Service
- GFOA Achievement Awards
- OU Recognition of Distinction
- OU Partnership Award
- Auditor of State and CAAO Honors
- 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
- 1st 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

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