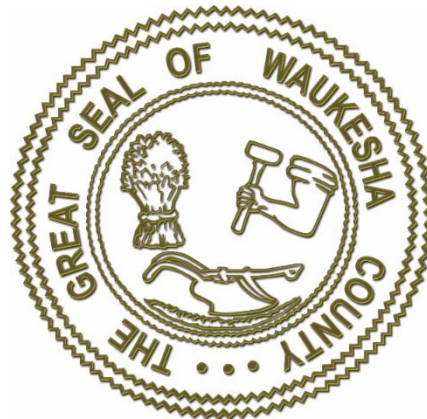


# Waukesha County Treasurer's Office

# Strategic Plan

## 2023 - 2025



*“Waukesha County Treasurer’s Office strives to provide quality & compassionate customer service with competence, skill, and cost effectiveness.”*

*– Pamela F. Reeves, County Treasurer*

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## Reader’s Guide: How to Read the Strategic Plan

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Thanks for reading Waukesha County Treasurer’s Office’s Strategic Plan.

This plan provides an overview of what Waukesha County leadership aims to achieve over the next three years and how this Department aims to meet those goals.

**Note:** Consider this Strategic Plan a high-level look at problem-solving initiatives. As such, a reader may not encounter data on all departmental activities (as found in an Operational Plan). We [welcome your questions and feedback](#) any time!

### What’s an Objective?

In this Strategic Plan, an Objective is a milestone to be reached. It must be **specific**, **measurable**, **attainable**, **realistic**, and **time-bound** (aka **SMART**).

Each objective appears in two places: In a list that shows all of our goals in one place, and on its own page (example below, right).

**Owner:** The member of our team that is accountable for this Objective.

Feel free to contact Waukesha County to discuss any objective – just ask for the person listed here. We do the very same!

**Strategy:** What must be accomplished in order to achieve our objective?

A company that sells fruit snacks may set an objective to “increase sales.” One of their strategies is to pioneer new points of sale beyond supermarkets and vending machines, like commercial air travel, pizza delivery, and pro sporting events.

Like each Objective, a Strategy has an **owner** who guides efforts for its completion and success. Find this in the center column.

In the right-hand column, please find the **timeframe** for each strategy. This represents each strategy’s deadline.

**Performance measures:**

A graphic or image show the progress and status of each Objective’s success.

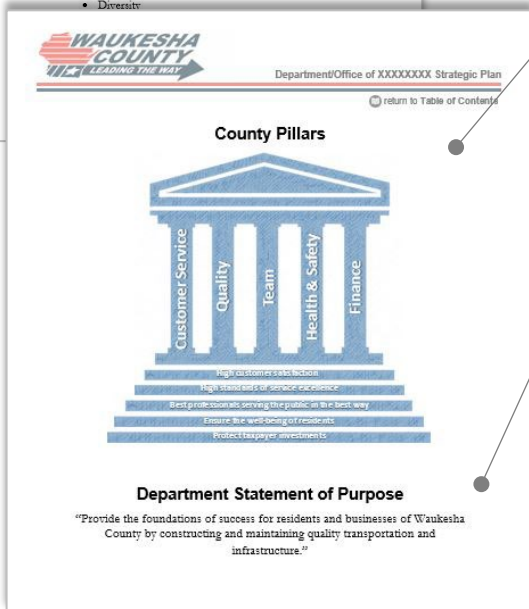
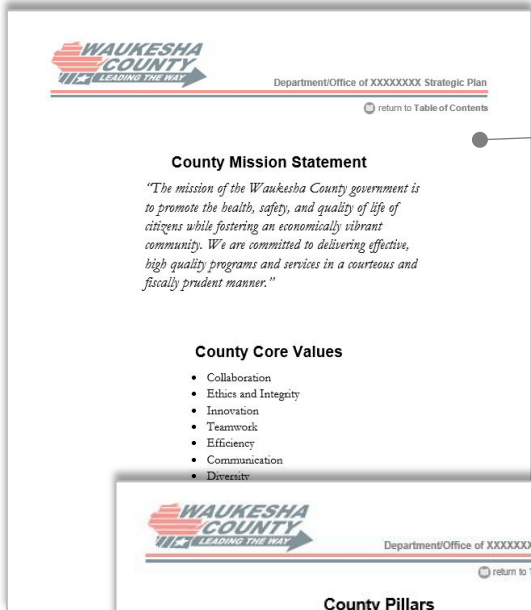
The screenshot shows a page header with the Waukesha County logo and 'Department/Office of XXXXXXXX Strategic Plan'. Below the header is a red bar with the text 'Pillar: Choose an item.' and two navigation links: 'return to Objectives list' and 'return to Table of Contents'. The main content area displays an objective with the following fields: Objective 1: Click or tap here to enter text., Owner: Click or tap here to enter text., and Performance Measure: Click or tap here to enter text. Below these fields is a large box labeled 'Insert graphic/image here'. To the right of this box is a 'Learn More:' section with three bullet points, each containing a link: 'Type here, update link'. Below the 'Learn More' section is a table with three columns: STRATEGY, STRATEGY OWNER, and TIMEFRAME. Each cell in the table contains the text 'Click or tap here to enter text.'.

### Learn More:

Jump to supporting resources found in this Strategic Plan’s appendices, on [WaukeshaCounty.gov](http://WaukeshaCounty.gov), or elsewhere!

Reader's Guide Continued

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**The origin of each Objective**

In each of Waukesha County's Departmental Strategic Plans, a pair of pages bears the principles and promises that guide our Objectives:

- Waukesha County's [Mission Statement](#). The big picture.
- County [Standards of Service Excellence](#), the principles we observe on our path to completing our mission.
- Waukesha County's [Five Pillars of Success](#), our framework for identifying core priorities and establishing program goals.
- Department's [Statement of Purpose](#). Each department completes a Strategic Plan. Each declares its own "mission" here.

**How is the objective shaped by the "environmental scan"?**

*Environmental scan (n): Monitoring of an organization's internal and external environments for detecting early signs of opportunities and threats that may influence its current and future plans.*

Find environmental scan data summarized in this document's [Appendix](#) sections.

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**Executive Summary: Mission Statement & Standards of Service Excellence**

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## County Mission Statement

*“The mission of the Waukesha County government is to promote the health, safety, and quality of life of citizens while fostering an economically vibrant community. We are committed to delivering effective, high-quality programs and services in a courteous and fiscally prudent manner.”*

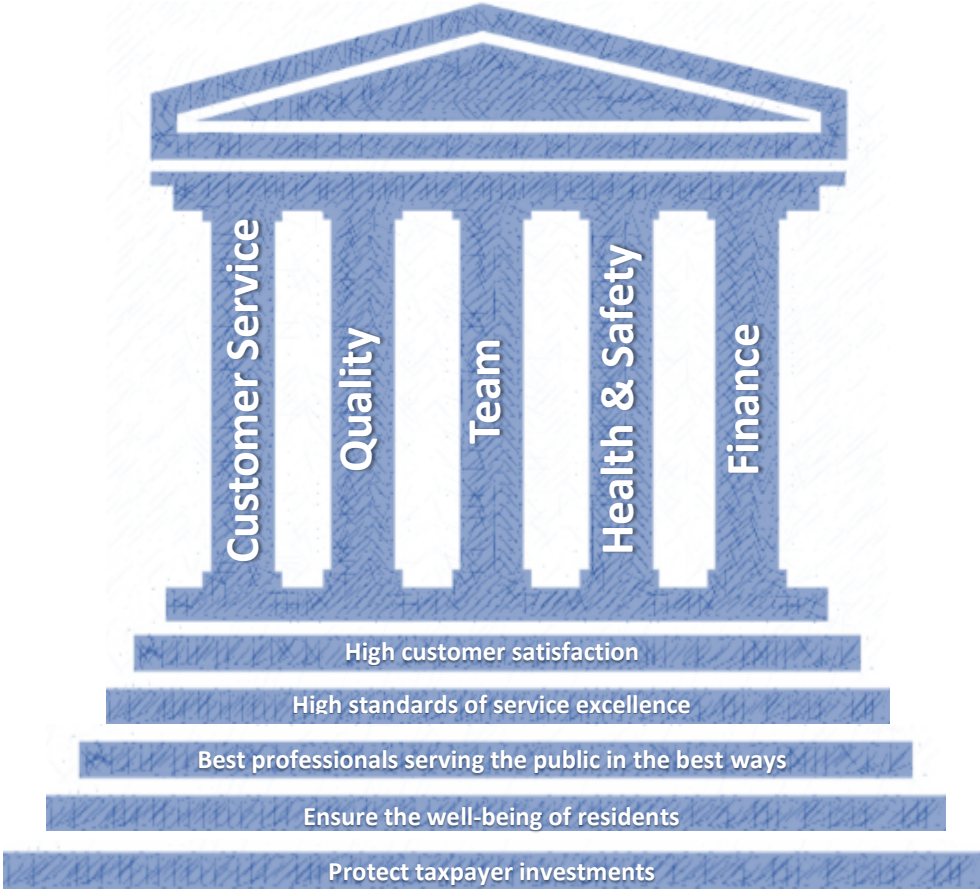
## County Standards of Service Excellence

- Teamwork & Collaboration
- Innovation
- Efficiency & Cost Savings
- Communication
- Ethics & Diversity
- Well-being

**Executive Summary: County Pillars & Statement of Purpose**

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# County Pillars



## Department Statement of Purpose

*“The mission of the County Treasurer’s Office is to provide efficient, courteous service and maintain accurate records, while upholding the fiduciary and statutory responsibilities required of the office”*

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## Executive Summary: Overview & Strategic Objectives

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### Strategic Planning Overview

Waukesha County has successfully used strategic planning tools for well over a decade. County Departments hold stakeholder focus groups, conduct environmental scans, and work with departmental strategic planning coordinators to perform major updates to their plans on a three-year basis and provide annual updates as needed.

Through strategic planning, the County has established links between our Standards of Service Excellence, business functions, and measurable program outcomes across all departments which results in an atmosphere of continuous improvement and better service delivery.

To help guide our strategic planning process and identify priorities, the County established a cross-departmental Strategic Planning Executive Committee which holds meetings and trainings with planning coordinators and has worked with outside consultants to provide expert guidance to ensure that each new generation of our strategic plan is better than the last.

### Strategic Objectives at a Glance:

- [Objective 1](#) - Increase the number of electronic property tax payments

**County Pillars: Customer Service and Quality**

 [Return to Strategic Objectives](#)

**Objective 1:** Increase the number of electronic property tax payments.

**Owner:** Treasurer’s Office

**Performance Measure:** An increasing rate of electronic submissions will indicate improved efficiency, improved cash flow and reduced costs.

Strategy	Strategy Details	Owner	Timeframe
Identify high payment volume financial institutions and mortgage companies.	Collaborate with third-party processors, financial institutions and mortgage companies to promote the streamlining of electronic payments.	Treasurer and Deputy Treasurer	Throughout 2023 - 2025
Promote to taxpayers payment of their taxes online through the County’s website at <a href="https://tax.waukeshacounty.gov/">https://tax.waukeshacounty.gov/</a>	<ul style="list-style-type: none"> <li>• Forward online payment details &amp; costs to municipalities to be included in tax bill mailing.</li> <li>• Include online payment details &amp; costs in mailings done by Treasurer’s Office.</li> <li>• Post online payment details &amp; costs on Treasurer’s webpage during peak payment periods.</li> </ul>	Treasurer and Deputy Treasurer	

**Learn More:**

- [Waukesha County - Treasurer](#)
- <https://tax.waukeshacounty.gov>



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## **Appendix A: Environmental Scan**

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### **Environmental Scan Overview**

#### **COMMUNITY ANALYSIS**

##### **Community Analysis Population, Census Data, Demographics**

Understanding the trends in growth and change in the population of Waukesha County will allow County Departments to strategically plan by responding to the needs of the population. As of the 2020 Decennial Census, approximately 408,756 people resided in Waukesha County and as of Wisconsin Department of Transportation's 2022 Report, the population is estimated to be over 410,000 residents. The County is made up of 37 municipalities, including 11 towns, 19 villages, and seven cities. There are opportunities to coordinate with these municipalities to work toward greater governmental efficiencies. Cooperation and coordination with these municipalities can reduce duplicative services that come at a cost to taxpayers. When consideration is given to the number of municipalities that our customers work with, it is also important to deliver services in the most efficient and logical way possible. Economic development is vital for communities in Waukesha County to retain optimum paying jobs, maintain municipal infrastructure and essential services, and maintain and expand quality of life.

##### **General population**

- The population is projected to increase to 427,721 by 2025 and to 442,476 by 2030. This equates to a 5.6% increase in population between 2020 and 2025 and a 3.2% increase in population between 2025 and 2030.
- The population is projected to grow by 91,500 persons between 2010 & 2050 (24% increase).
- Projections show that through 2050, Waukesha County will continue to be the third largest county in population in Wisconsin.
- Net migration will continue to be the primary source of the population increase. The number of births (natural increase) is expected to increase moderately, but the number of deaths is expected to increase substantially because of deaths from the aging population (baby boomers). Wisconsin DOA Projections show that the number of deaths will exceed the number of births between 2030 and 2040, resulting in a negative natural increase in the County.
- Over the past 60 years, Waukesha County's share of the regional population has increased from 7% to 19.3%, whereas Milwaukee County's share of the regional population has decreased from 70% to 47%.
- Waukesha County's share of the regional population is projected to increase from 19.3% (measured in 2010) to 20.4% by 2050, whereas Milwaukee County's share of the regional population is projected to decrease from 47% to 41.5%.
- The median age in Waukesha County is approximately 44.9 years old. The median age has been increasing since 1970 when it was 25.4 years old.
- People 65 yrs. and older made up approximately 14.3% of the population in 2010 and 17% in 2015, 19.6 in 2020. This population is projected to make up 25.4% of the population by 2040.
- The youngest members of the baby boomer generation will reach age 65 by 2030.

### Race

- Approximately 87% of Waukesha County residents are Non-Hispanic White.
- The Hispanic or Latino population has increased from 4.1% in 2010 (16,123) to 5.3% (21,664) in 2020
- The Black or African American population has increased from 1.3% (4,914) in 2010 to 2% (8,175) in 2020.
- The Asian population has increased from 2.7% (10,271) in 2010 to 4.1% (16,759) in 2020, an increase of 5,236 people.
- The American Indian population has continued to be approximately 0.3% of the overall population

### **Community Analysis: Health and Public Safety**

#### COVID-19 Recovery

Waukesha County engaged in the evaluation of the American Rescue Plan Act – Coronavirus State and Local Fiscal Recovery Funds (ARPA-SLFRF) program's final rules and selection of projects for which this funding can be used. In addition to using this funding for continued costs related to the pandemic response, the County established teams to analyze the needs of the County against the objectives of the grant while ensuring that program outcomes are achieved in an effective, efficient, and equitable manner.

Projects were submitted by established teams and were reviewed against the objectives of the County including:

- Addressing short-term pandemic related operational impact
- Investing in public health infrastructure (e.g., mental health, substance abuse, community violence interventions)
- Advancing economic recovery and growth
- Investing in productivity, generating return on investment
- Enhancing services
- Leveraging partnerships and collaborations, both internally and with other governments
- Meeting federal timeline restrictions (funding through 2026)
- Mitigating program risks/long-term levy impacts
- Managing total funding availability

Limiting administrative complexity Prior to the release of the final rule, projects were approved based on the interim allowed use guidance. This included continued pandemic response, addressing the impact of the pandemic on the Courts system, investing in Health and Human Services (HHS) technology needs, and administrative costs to manage this grant. After the final rule was released, the projects submitted were reviewed against allowed uses and proposed to the workgroup teams for feedback. Presentations were given on the use of ARPA funding to management teams, the County Executive, the Executive's Cabinet, department heads and the full County Board. The first projects, after the release of the final rule, were approved starting in May of 2022, and include projects for law enforcement

capacity, mental health services, technology enhancements, and water and sewer infrastructure. To effectively continue to respond to the pandemic and assist in local post-pandemic recovery, Waukesha County has established ARPA Management Response Teams with representatives from countywide functional areas.

#### Community Health Improvement Plan & Process (CHIPP)

The task of improving the health of Waukesha County is not one that can be done alone but requires the collaboration of the community to make a collective impact. Under the leadership of the Waukesha County Department of Health and Human Services and the Public Health Division, a cross-sector Steering Committee composed of key community leaders formed to participate in a Community Health Improvement Plan & Process (CHIPP), focused on improving community health.

The CHIPP Steering Committee created the following vision that became the guiding framework for community health improvement. The vision for a healthy Waukesha County is strong families, connected communities, healthy environments, and accessible services that promote overall safety, well-being, and quality of life. After conducting several in depth assessments over the course of a 9-month period, the Steering Committee identified three strategic priorities to improve community health in Waukesha County: Opiates, Mental Health, Nutrition & Physical Activity. Action teams were formed around these three strategic health priorities.

The CHIPP engaged a cross-sector of community partners from 2017-2021 and created action plans focused on these critical strategic health issue areas. These community partners included nonprofit, healthcare, education, law enforcement, business, government, and other relevant stakeholders. The CHIPP Steering Committee provided guidance and oversight throughout the entire time frame. The work of the CHIPP supports Waukesha County's mission which is to promote the health, safety, and quality of life of citizens while fostering an economically vibrant community. Improving the health and well-being of Waukesha County citizens correlates directly with strengthening economic opportunities for Waukesha County residents.

Opiate Action Team: As a result of wide-ranging efforts to gather local data to inform the CHIPP process, the citizens of Waukesha County identified that the opioid epidemic was their number one concern relative to community health. The Heroin Task Force (HTF) of Waukesha County began their work in 2014 and integrated their efforts with the CHIPP in 2017.

Today, the HTF of Waukesha County continues to spearhead the continued work of this action team. The HTF has recently been realigned to be more effective and responsive to new opiate trends. Over 175 community partners have re-engaged with the newly formed HTF during 2021. Of those partners, over 60 have committed to serving on action teams. These action teams will be using a data driven collective impact approach to identify specific action to be taken in the areas of Prevention, Harm Reduction, Treatment & Recovery, and Data and Reporting.

Mental Health Action Team: Prior to the pandemic, nearly one in five Americans suffered from mental illness, according to NAMI (National Alliance on Mental Illness). Millions of people are affected by mental illness each year, and the pandemic has only exacerbated this critical health issue. Mental health was ranked as the number two health concern in Waukesha County during the CHIPP assessment process. Suicide is the tenth leading cause of death in the United States and has risen steadily since the 2000's. The Mental Health action team saw the rising suicide rates in Waukesha County and focused their efforts on suicide prevention. This team's overarching focus was to successfully launch the Waukesha County Suicide Prevention Initiative (WCSPI) which is dedicated to reducing the number of deaths by suicide in Waukesha County by scaling up evidence-based mental health practices in prevention, stigma reduction, and access to treatment.

Nutrition & Physical Activity Action Team: Because of the overarching impact of nutrition and physical activity on literally every aspect of overall health for every age group, this concern was chosen as the third health priority during the CHIPP assessment. The goal of this team was to improve physical activity and nutrition for Waukesha County residents. Their approach was to reduce barriers to residents who couldn't access healthy food or physical activity options. This Action team divided their work into two teams and offered incredible opportunities to improve personal well-being in both areas of their focus: Nutrition and Physical Activity.

#### Opioid Epidemic

In Waukesha County, drug-related deaths became the leading non-natural cause of death for adults ages 18-45 in 2020 and 2021, driven by a rise in fentanyl poisoning. Waukesha County saw a record ninety-five drug-related deaths in 2020. In 2021, at least ninety-two people died from drug-related causes, with ten cases still being pending investigation as of the end of Q3 2022.

From May 2017 to July 23, 2022, more than 305 documented lives have been saved, at least 303 used the overdose reversal drug Naloxone/Narcan, because of the Waukesha County HHS Naloxone Project.

From May 2017 to June 2022, people who are using, their family members and friends, First Responders, and the public have been helped through: 521 Naloxone administration training sessions to 4,918 individuals, which includes 1,048 law enforcement personnel. 7,170 Naloxone kits have been distributed free of charge.

Waukesha County leaders announced new efforts to prevent substance use in the community through allocation of approximately \$200,000 to expand prevention efforts in schools and the community.

On August 1, 2022, Waukesha County Executive Paul Farrow declared fentanyl to be a community health crisis in Waukesha County. Fentanyl, a synthetic opioid up to 100 times more powerful than morphine, is fueling overdose deaths across the US and Wisconsin.

The Declaration provides directives to do the following:

- Distribute opioid settlement money, in partnership with the County Board; to support Narcan training, the District Attorney's pre-trial diversion programming, and other related purposes.

- Implement the Overdose Fatality Review (OFR) initiatives, in partnership with public and private entities and surrounding counties to share data and best practices.
- Launch a local public information initiative utilizing the US Drug Enforcement Agency’s ‘One Pill Can Kill’ campaign.
- Create a set of measurable objectives to track the county’s efforts in the fight against fentanyl that will be evaluated on a quarterly basis.

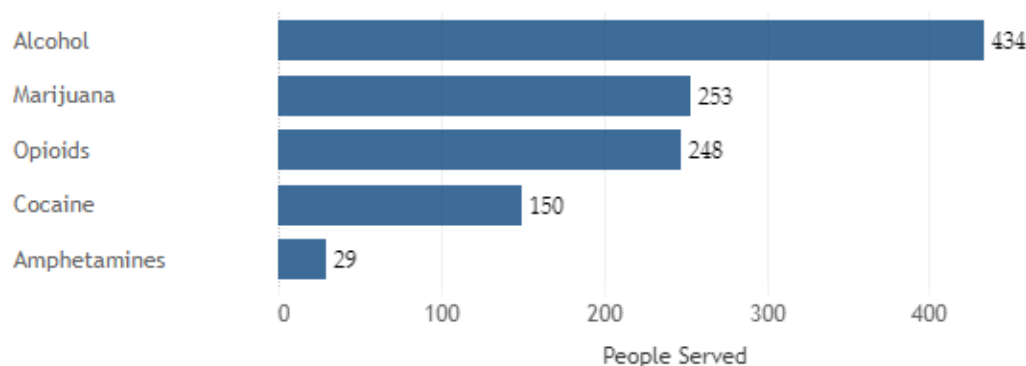
Earlier in Summer 2022, the Waukesha County Sheriff’s Department’s announced that its Metro Drug Unit will transition into a unit of the federal Drug Enforcement Administration (DEA) later this year. As a federal task force, the Metro Drug Unit will have an enhanced ability to continue the reduction of available controlled substances within Waukesha County. They will also be able to pursue investigations that lead to source suppliers outside of Waukesha County. Waukesha County is also working to expand a program that embeds a counselor into the Sheriff’s Department to expedite care for mental health crises.

In 2022, HHS added an additional full-time peer support specialist to its Outpatient Mental Health and Substance Use Services Clinic Staff. The Waukesha County Heroin Task Force has relaunched its collaborative work to reduce the impact of the opioid epidemic in the County. Action Teams of key community stakeholders work collaboratively in three key areas: Prevention, Harm Reduction, and Treatment & Recovery to achieve results within a calendar year.

HHS maintains a strong relationship with the AODA Volunteers of Waukesha County, who provide valuable outreach, education, and support services to individuals in recovery, or who are considering abstinence from drugs or alcohol. The Women’s Health and Recovery Project (WHARP), coordinated by Waukesha County HHS, assists women with substance use disorders, and their children, who have complex needs with issues such as housing, employment, mental health, physical health, transportation, and childcare.

Waukesha County participates in multiple statewide initiatives, such as Drug Treatment Court, National Prescription Drug Takeback Day, and the Wisconsin Injection Drug Use Prevention Project

### Top 5 Most Common Substances in 2020



**Total Cases Referred to DA's Office**

	2019	2020	2021
Cases	8,801	9,768	10,115

In comparing 2019 (pre-pandemic) to 2021, there was approximately a 15% increase in arrests and referrals to the DA's Office for charging decisions.

**Community Analysis: Legislative Redistricting**

Wisconsin's Legislative Redistricting

Every 10 years, following the U.S. Census legislative district lines are redrawn based upon statewide population shifts. The process of redrawing the lines is run by the state legislature and requires approval of the Governor. Following the 2020 Census, the legislature and governor failed to reach an agreement on the proposed redistricting lines, and, therefore, the approval of new legislative districts fell to the Wisconsin Supreme Court. The Court's conservative majority adopted a "least change" approach to the existing districts which favors the State Legislature being in Republican control for the next decade. With adoption of the new district maps Waukesha County lost two Assembly seats, two Senate seats, and is now represented by only one Member of the United States Congress – portions of Waukesha County are now included in 10 Assembly districts, 4 State Senate districts and 1 Congressional district. During the previous ten years, Waukesha County represented in 12 Assembly districts, 6 State Senate districts and 2 Congressional districts. This change will likely result in Waukesha County having less influence over policies and laws adopted in Madison. The County intends to counter this loss of legislative representation with the leveraging of relationships between the County Executive's Office, the County Board legislative staff, and legislative and executive leaders in the State Capitol.

County Board Redistricting

Like statewide redistricting, the Waukesha County Board districts also change following each 10-year U.S. Census. The Waukesha County Board adopted Supervisor districts in 2021 that incorporated new population estimates. As part of the redistricting process the County Board adopted a resolution establishing the County Board size to remain at 25 districts. In 2022, six County Board Supervisors opted not to run for re-election and one resigned from the board prior to the election. Four of the Supervisors that ended their tenure on the Board served as committee chairs and three Supervisors each served more than 20 years on the County Board. The turnover has provided more opportunities for new Supervisors to hold positions of leadership on the County Board. Departments should be prepared to provide more education on issues and policies at the committee level to ensure that all Board members have a thorough understanding of the issues before them.

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## ECONOMICS

### Unemployment/Jobs/Business

#### Unemployment

- The County's 2022 unemployment rate is lower than the national average (2.9% vs 3.7%).
- County's Unemployment rate Feb 2020: 2.6%
- County Peak unemployment rate during the COVID-19 pandemic: 12.3%
- County Unemployment rate as of July 2022: 2.9%

The county's unemployment rate is back near pre-pandemic levels. The result of the employment rebound is a very tight labor market that is making recruitment of county employees more difficult and is increasing salary demands across many job classifications.

#### Jobs

- Job growth is projected to increase from 242,001 in 2017 to 338,000 in 2050. (SEWRPC 2020)
- From 2013-2017 medium to large sized business growth outpaced small business growth.
- By 2050 Waukesha County is projected to have 24.4% of the total jobs in the metropolitan statistical area (Milwaukee and Waukesha Counties).

#### Business Survey

The Waukesha County Business Survey was conducted in cooperation with Waukesha County, the Waukesha County Business Alliance, the Waukesha County Center for Growth, and the Waukesha-Ozaukee-Washington (WOW) Workforce Development Board in September 2021. A total of 203 businesses responded to the survey. Respondents included representatives from 35 of Waukesha County's 37 municipalities, a wide range of business sectors, and companies sized from the self-employed to operations with more than 1,000 employees.

Highlights from the survey include:

- 79% of businesses plan to expand their workforce in the next three years
- 78% of businesses report 'lack of qualified talent' as a primary challenge for staff recruitment.
- Of those hiring:
  - 50% plan to add 1-9 employees
  - 19% plan to add 10-19 employees
  - 14% plan to add 20-49 employees
  - 7.36% plan to add 50-99 employees
  - 4% plan to add 100-249 employees
  - 5.5% plan to add 250 or more employees
- The top five responses to how businesses are planning to expand over the next three years include:
  - 73% plan to increase sales
  - 70% plan to hire employees
  - 51% plan to expand offerings
  - 30% plan to add new capital/equipment
  - 27% plan to acquire another business

- 49% of respondents have reached 100% capacity at their existing location which is down from 60% in 2017
- 39% of respondents do not own or lease sufficient property to allow for expansion
- When choosing to locate a business, the topmost important factors to respondents are availability of workforce and proximity to customers

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## COUNTY FINANCIAL ANALYSIS

### Housing

Economic development is vital for communities in Waukesha County to retain optimum paying jobs, maintain municipal infrastructure and essential services, and maintain and expand quality of life.

The population in Waukesha County continues to age. As the baby boomer population enters retirement, the county must consider a variety of housing types to accommodate the changing needs of this age group as it relates to household type, income, and location. With the baby boomers leaving the workforce and requiring services, there is also a need to attract a new workforce. The available workforce population, which is younger and more racially diverse than before, requires the same housing considerations as the baby boomers. Locating a variety of housing near job centers helps attract skilled workers to the county and provides a customer base for nearby goods and services, parks, and available public transit. Nationally and locally, there has been an increasing demand for living units located near entertainment venues and workplaces, as millennials and empty nesters look for more dynamic living arrangements within walkable settings.

### Household/Family

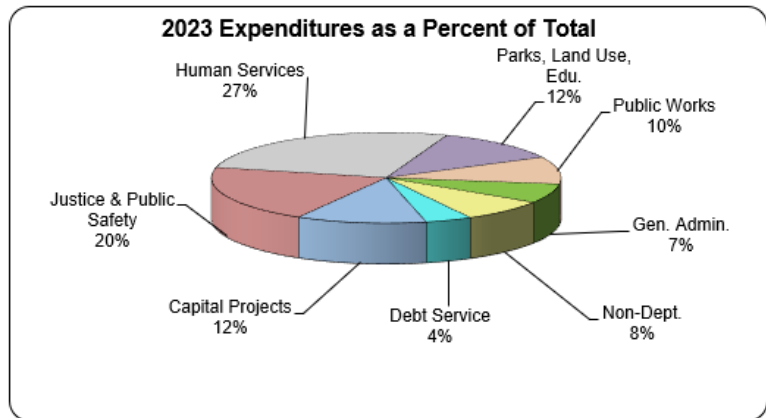
- There are approximately 160,600 households in Waukesha County. The number is expected to increase about 3% every 5 years. The average persons per household is approximately 3.
- The county is relatively affluent with a median household income of \$92,359, which is above both the state (\$64,901) and national (\$67,340) median, and the highest among all counties in Wisconsin. Similarly, per capita income in Waukesha County is estimated at \$75,958, which is higher than the state (\$55,593) and the nation (\$59,147), and the second highest among all counties in Wisconsin (behind Ozaukee County at \$87,395). The latest data available is from 2020.
- The county has experienced healthy property value growth in recent years. Following several years of declining property value during the Great Recession, property values began increasing for 2014. Between 2016 and 2021, property value growth increased about 5% on average annually, with the January 1, 2022, estimate growing 13%. The increase is mostly due to higher value inflation and, to a lesser degree, new development. A realistic assumption for future growth would be about 4% but could be lower or negative if there's an economic downturn.



- The median home sale price in 2022 was \$312,000, up 5.8% from 2021.
- The county is subject to state-mandated property tax levy limits, with growth in the levy primarily tied to “net new construction.” Net new construction consists of the value of new construction (i.e., development) minus demolition and is divided into the previous year’s total tax levy base (including tax increment districts) to get the growth factor.
- The county has experienced healthy growth recently, averaging over \$900 million in net new construction the last seven years, with its highest year ever in 2021 with nearly \$1.2 billion. However, the county’s tax base is comparatively large (\$66.7 billion for 2023 budget purposes, and \$75.4 billion for 2024 budget purposes), so that this growth results in a relatively small net new construction growth factor, averaging 1.64% the last seven years. Assuming continued property value growth levels like recent years, the net new construction factor is expected to continue to decrease even if high levels of development are maintained.

Waukesha County Budget: Expenditures

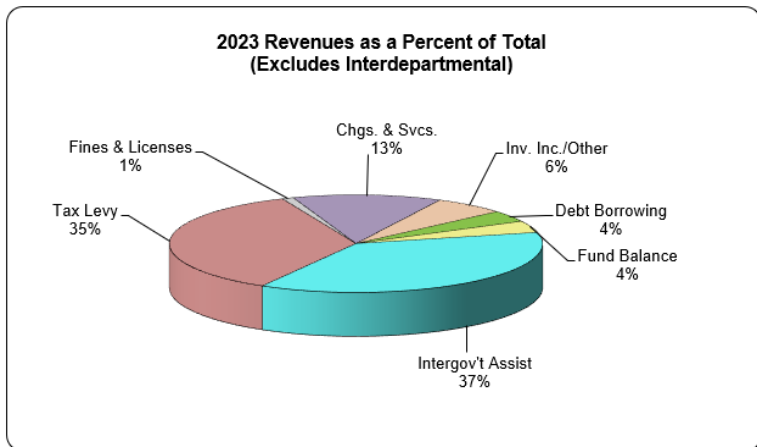
The total operating budget (excluding capital projects and debt service) typically increase about 2%-3% and can fluctuate from year-to-year due to state and federal funding awards. Increases for the 2022 adopted and 2023 proposed are higher at about 5% and 7%, respectively, due to additional federal pandemic relief funding. The county provides many labor-intensive services, and personnel costs consistently make up about half of total operating budget. The two largest functional areas, Justice & Public Safety and Health & Human Services, consistently comprise about 55%-56% of the operating budget (excluding capital and debt). Debt service costs are expected to increase in future years due to additional borrowing needed for the courthouse project and the increasing cost of maintaining infrastructure. The graph above displays expenditures by functional area, including capital and debt.



Due to relatively stable price levels, the cost to continue has been assumed to be about 3% in recent years. Since 2021, there has been an increase in price levels nationwide, with year-over-year increases in the Consumer Price Index exceeding 8% for most of 2022. Higher price levels are due to increased consumer demand following the easing of pandemic restrictions, supply chain disruptions, higher fuel prices, and a competitive labor market. The county typically assumes slower growth in revenues, due to state-mandated levy limits and minimal increases in ongoing state/federal aid to help cover mandated services, resulting in forecasted gaps between revenues and expenditures. Typically, the gap is between \$3 million and \$5 million, but was forecast at above \$7 million for 2023 due to higher price levels.

Waukesha County Budget: Revenues

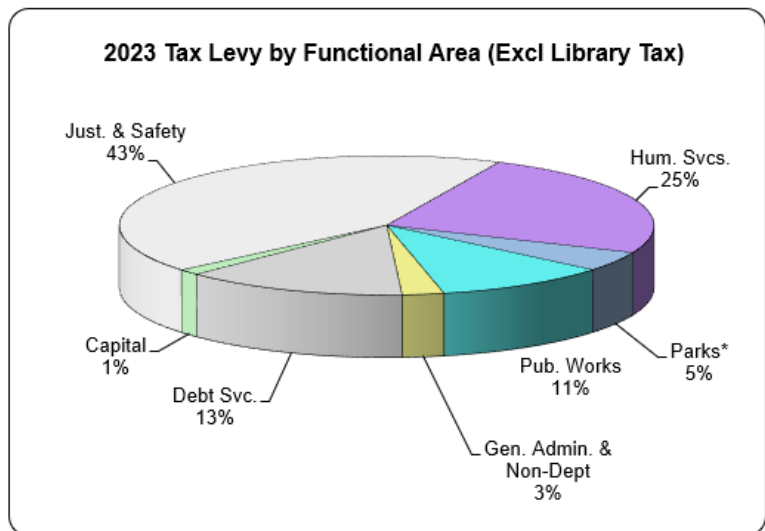
The share of total budgeted revenues coming from the property tax has declined from 42% in the 2018 budget to 39% in the 2022 budget, mostly due to state-mandated levy limits and budgeting \$8 million of additional temporary federal American Rescue Plan Act (ARPA) funds (excluding ARPA funds, levy would be 40% of revenues). The tax levy share decreased more significantly to 35% in the 2023 proposed budget; though, that is largely due to budgeting \$28.9



million of ARPA funding (excluding ARPA, would be 39%). The county carries out several programs on behalf of the state and federal government (mostly in Justice & Public Safety and Health & Human Services), so about a quarter of the total revenue budget is typically from state and federal revenue sources (higher in 2023 due to ARPA funding); though growth in these revenue sources is often minimal and insufficient to keep up with the increasing cost of mandated services. Also, the county attempts to maintain a diversified and stable revenue stream, which includes a reliance on user fees where costs can be directly related to the level of service provided and recovered through charges to individuals and organizations that directly benefit from those services. The county’s budget philosophy is to review and adjust user fees where allowable to cover increasing program costs, reducing reliance on tax levy. User fees/charges for service make up about 13% in the 2023 proposed budget.

County Tax Levy

The share of tax levy going to Justice and Public Safety has increased from 41% in the 2014 budget to 43% in the 2023 proposed budget, due in part to it being a priority area for the county and the limited ability for these operations to generate other revenues. Together with Health & Human Services, over 2/3 of tax levy goes to these two functional areas. State imposed tax levy limits continue to put pressure on our county budget. The pace of inflation and the increasing market demand for higher wages that have accompanied the tight labor market is making living within levy



limits increasingly difficult. The county continues to resist imposing the statutorily allowable county sales tax to offset the restrictions of the tax levy cap. The county will continue to monitor actions of the State Legislature that could ease levy limits or support alternative funding sources for counties.

**INTERNAL ANALYSIS**

County Facilities and Operations:

From 2023 to 2026 the existing Waukesha County Courthouse Building will undergo an extensive renovation to upgrade the facility and prepare the county to serve its citizens for at least the next 50 years. This project will have an impact on county employees working in both the existing 1959 Courthouse Building and the Administration Center, as well as the visiting public. Business operations in both buildings will be affected at various times during the project. Departments should consider how its employees will be impacted by temporary office movements and consider potential changes or modifications to service delivery to customers who visit the two buildings.

Customer Service

Waukesha County is committed to the highest levels of customer service. Our team is dedicated to serving all customers by living our core values, standards of service, and behaviors of excellence. Waukesha County continues to focus its efforts on high levels of customer service, we can measure this using the Waukesha County Customer Service Survey. Waukesha County sets a goal to meet a 4.65 out of 5 for our overall customer service interactions.

	2018	2019	2020	2021	2022 (Jan. through Sept.)
Accessibility	4.64	4.67	4.55	4.49	4.49
Attitude	4.67	4.8	4.61	4.62	4.55
Accuracy	4.63	4.72	4.54	4.48	4.51
Communication	4.61	4.72	4.53	4.5	4.51
Timeliness	4.62	4.71	4.54	4.53	4.49
<b>Overall</b>	<b>4.63</b>	<b>4.73</b>	<b>4.55</b>	<b>4.52</b>	4.51

Employee Survey

Waukesha County received 843 complete responses to its 2021 Employee Engagement Survey, which is one of highest response rates since the survey began in this format 2014.

As in past years, respondents were asked a range of questions about communication, sharing information, professional development, and continuous improvement. This includes four key questions that we have been measuring over time with a goal of meeting an 80% agreement threshold (Calculated by adding the % of ratings of Strongly Agree and Somewhat Agree).

Countywide results of those questions as of 2021 can be found [here](#).

**89%** I understand that I can be recognized for extra effort while demonstrating the County’s Standards of Service Excellence

**81%** Information and knowledge is shared openly within my department

**91%** During my annual performance evaluation with my direct supervisor, I discussed training needs and opportunities for professional development

**96%** I understand how my work and assigned goals directly contribute to the overall success of the County in meeting its key strategic priorities

**Historical Perspective:**

<u>2014</u>	<u>2021</u>	<u>Difference</u>
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I understand how my work and assigned goals directly contribute to the overall success of the County in meeting its key strategic priorities

87%	96%	+9%
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Information and knowledge is shared openly within my department

64%	81%	+17%
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During my annual performance evaluation with my direct supervisor, I discussed training needs and opportunities for professional development

73%	91%	+18%
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I understand that I can be recognized for extra effort while demonstrating the County’s Standards of Service Excellence

61%	89%	+28%
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I met with my direct supervisor or manager for a 1-on-1 rounding session\*

83%	86%	+3%
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Comparing the 2014 results with the 2021 shows dramatic improvement in responses. The results are a testament to what a culture of continuous improvement should produce. We should all be proud of our progress and keep working to reach our 80% goal across all categories.

Countywide and Departmental Results using Power BI Dashboarding:

To help understand the survey data and facilitate communication with county teams, Department Heads are provided a link to dashboards visually depicting the survey data in each department. Data may then be shared across Departments and utilized to determine individual or departmentwide performance goals or measure success of key initiatives. The Countywide dashboard data can be found [here](#).

**County HR Scan Overview**

County Employment Demographics - Years of Service

The charts below outline distribution of employees by years of county service. During the five-year period between 2018 and 2022 the percentage of employees with five or less years of county experience has grown from 38% to 45%. This trend is even more pronounced in comparison to 2012 where county work experience was more evenly distributed and the largest percentage of the workforce having twenty or more years of experience at Waukesha County.

Year-2022		Years of Service					County Total
Department	<5	5-9	10-14	15-20	>20		
Administration	37%	15%	12%	19%	16%	100%	
Circuit Court Services	52%	13%	6%	13%	16%	100%	
Corporation Counsel	45%	18%	13%	13%	13%	100%	
Emergency Preparedness	39%	22%	14%	20%	6%	100%	
Public Works	49%	13%	8%	8%	22%	100%	
District Attorney	43%	7%	11%	14%	25%	100%	
Health and Human Services	48%	19%	11%	11%	11%	100%	
Parks and Land Use	39%	18%	9%	8%	26%	100%	
Sheriffs Department	45%	15%	11%	16%	13%	100%	
Multi Departments	33%	26%	11%	11%	19%	100%	
<b>County Total</b>	<b>45%</b>	<b>17%</b>	<b>11%</b>	<b>13%</b>	<b>15%</b>	<b>100%</b>	

Year -2018		Years of Service					County Total
Department	<5	5-9	10-14	15-20	>20		
Administration	24%	11%	15%	24%	26%	100%	
Circuit Court Services	43%	10%	12%	15%	21%	100%	
Corporation Counsel	36%	23%	15%	13%	13%	100%	
Emergency Preparedness	41%	17%	29%	6%	8%	100%	
Public Works	35%	8%	10%	19%	29%	100%	
District Attorney	24%	6%	9%	32%	29%	100%	
Health and Human Services	45%	16%	14%	12%	13%	100%	
Parks and Land Use	34%	11%	8%	26%	21%	100%	
Sheriffs Department	35%	15%	19%	15%	16%	100%	
Multi Departments	42%	23%	11%	13%	12%	100%	
<b>County Total</b>	<b>38%</b>	<b>14%</b>	<b>15%</b>	<b>15%</b>	<b>17%</b>	<b>100%</b>	

Year 2012		Years of Service					County Total
Department	<5	5-9	10-14	15-20	>20		
Administration	12%	19%	22%	12%	34%	100%	
Circuit Court Services	17%	21%	21%	8%	34%	100%	
Corporation Counsel	8%	23%	23%	8%	38%	100%	
Emergency Preparedness	28%	50%	9%	3%	10%	100%	
Public Works	12%	11%	21%	20%	37%	100%	
District Attorney	6%	13%	31%	19%	31%	100%	
Health and Human Services	24%	19%	16%	13%	28%	100%	
Parks and Land Use	7%	15%	25%	13%	40%	100%	
Sheriffs Department	19%	25%	18%	14%	24%	100%	
Multi Departments	23%	22%	21%	16%	17%	100%	
<b>County Total</b>	<b>18%</b>	<b>21%</b>	<b>19%</b>	<b>13%</b>	<b>29%</b>	<b>100%</b>	

During the past decade, the County emphasized succession planning recognizing that many employees would be reaching retirement age. Training programs such as Standards of Service Excellence (SOSE), Management University, Effective Supervision and Mentoring have been instrumental in employee transitions and in the mitigation of institutional knowledge loss as experienced employees, senior professionals, and managerial staff, have retired.

County Employment – Turnover

As the workforce transitions, it points toward the need for continued emphasis on a county-wide efforts to recruit, develop and retain employees. This is especially clear when reviewing countywide turnover data, which in recent years has been affected by the low unemployment rate and changes in workforce participation coming out of the COVID-19 pandemic. The chart below presents ten years of data, and shows an uptick in overall turnover, regrettable turnover, and total resignations during 2021 and 2022.

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022 Aug
FTE--Budgeted Positions	1,366	1,368	1,363	1,354	1,354	1,373	1,381	1,390	1,390	1,404
FTE--Total Turnover	102	123	157	163	133	175	159	156	238	206
% Turnover	7.5%	9.0%	11.5%	12.0%	9.8%	12.7%	11.5%	11.2%	17.1%	14.7%
Regrettable Turnover*						68	66	68	106	135
% Regrettable Turnover						5.0%	4.8%	4.9%	7.6%	9.6%
<b>Separation Type</b>										
Resignation	42	45	74	92	86	101	108	87	146	168
Retirement.	49	67	58	58	38	65	41	52	68	31
Other	11	11	25	13	9	9	10	17	24	8
<b>Total</b>	<b>102</b>	<b>123</b>	<b>157</b>	<b>163</b>	<b>133</b>	<b>175</b>	<b>159</b>	<b>156</b>	<b>238</b>	<b>206</b>

\***Regrettable Turnover:** Employees who left County employment that we planned to retain, or voluntary separation by individuals who are top performers, or high-potential employees, or where the separation is from a key position for which a possible successor has not been previously identified

\*This turnover analysis does not include employees that transferred to other departments or had job assignment changes within the county

**SOURCES**

SEWRPC Vision 2050 (Updated): Land Use and Transportation Data

<https://www.sewrpc.org/SEWRPCFiles/Vision2050/2020UpdateReportFinal.PDF>

SEWRPC "The Economy of Southeastern Wisconsin":

<https://www.sewrpc.org/SEWRPCFiles/Publications/TechRep/tr-010-5th-ed-economy-se-wisc.pdf>

Waukesha County Business Alliance Annual Business Survey Summary:

[www.waukesha.org/wp-content/uploads/2021/11/Waukesha-County-Business-Survey-Executive-Summary.pdf](http://www.waukesha.org/wp-content/uploads/2021/11/Waukesha-County-Business-Survey-Executive-Summary.pdf)

Waukesha County Executive Budget 2023 Demographic Information:

<https://www.waukeshacounty.gov/globalassets/administration/budget/2023-executive-budget/introduction/6-waukesha-county-community-profile.pdf>

United States Census: Waukesha County 2020 Quick Facts

<https://www.census.gov/quickfacts/waukeshacountywisconsin>

Waukesha County Demographics and Housing Data:

<https://www.point2homes.com/US/Neighborhood/WI/Waukesha-County-Demographics.html>

Wisconsin Counties Association County Fact Book 2022:

<https://www.forward-analytics.net/wp-content/uploads/2022/09/2022-County-Fact-Book-1.pdf>

Waukesha County Community Health Improvement Plan & Process (CHIPP) 2017-2021 Summary

Document. [https://www.waukeshacounty.gov/globalassets/health--human-services/public-health/chipp/chipp-summary-report\\_11-2021.pdf](https://www.waukeshacounty.gov/globalassets/health--human-services/public-health/chipp/chipp-summary-report_11-2021.pdf)