

2026-2028 STRATEGIC PLAN



 waukeshacounty.gov



TABLE OF CONTENTS

Transmittal Letter
County Mission Statement
County Standards of Service Excellence
County Pillars



Strategic Plan Objectives

Objective 1: Enhance Customer Service and Organizational Development
Objective 2: Promote Consolidation and Efficiency
Objective 3: Maintain Evergreen Policies
Objective 4: Optimize Workday
Objective 5: Deploy Learning Management System
Objective 6: Conduct Total Compensation Study
Objective 7: Maintain and Enhance Employee Benefits
Objective 8: Develop a Biennial Budget
Objective 9: Unify Technology Planning and Execution
Objective 10: Empower Decision-Making with Data
Objective 11: Enhance Efficiency with AI and Automation
Objective 12: Safeguard County Assets and Data
Objective 13: Promote Collaboration, Innovation, and Adaptability
Objective 14: Complete Comprehensive Fiscal Risk Analysis

Appendix A – Department of Administration Environmental Scan



TRANSMITTAL LETTER

APRIL 2026



Waukesha County Executive Paul Farrow
Waukesha County Board of Supervisors
Waukesha County Residents

Dear County Executive Farrow, County Board Supervisors, and Waukesha County Residents:

The Department of Administration is pleased to present the Waukesha County Department of Administration (DOA) 2026–2028 Strategic Plan. This plan was developed through a comprehensive stakeholder review and an all-DOA employee collaborative process, guided by the priorities identified in the County’s environmental scan.

DOA’s mission is to support County departments and strategic partners by delivering consistent standards and high-quality services in human resources, finance, risk management, procurement, and information technology. The objectives in this plan focus on continuous improvement and on enabling better service to County departments and the public. The DOA Strategic Plan will guide our annual budgeting, departmental priorities, and individual performance goals.

In addition, DOA is committed to responsibly advancing innovation through the safe and strategic use of Artificial Intelligence (AI). As a founding member of the GovAI Coalition, the department’s partnership strengthens its ability to evaluate emerging technologies, develop practical and ethical use cases, and ensure that any AI tools we deploy meet the highest standards for public-sector reliability.

As financial pressures increase, DOA will remain focused on efficiency, service prioritization, and new ways of working to deliver the outcomes Waukesha County expects.

Thank you to our customers, partner departments, residents, and DOA staff for their participation and insight, which shaped this plan. If you have questions, please contact me 262-548-7020.

Sincerely,

Andrew Thelke
Director of Administration
Waukesha County Department of Administration

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



COUNTY PILLARS



“Through employee dedication to continuous improvement and strategic initiatives, the Department of Administration is committed to exceptional customer service and the delivery of outstanding value to the residents of Waukesha County.”

Andrew Thelke



Director of Administration

Waukesha County Department of Administration

Pillar: Customer Service, Quality, Team

Objective 1: Enhance Customer Service and Organizational Development

Increase institutional capacity to perform all functions, especially technical, complex, and high-risk assignments. Increasing capacity will enhance customer service, especially during times of position transition (i.e., turnover), allow risks to be reduced, and allow service levels to be maintained or enhanced. This is especially pertinent during this time of organizational consolidation. The County has built standard systems and operating procedures but there are still key positions that are “one deep”. As a result, a vacancy in those positions would be disruptive in meeting organizational goals and providing expected services.

To address this concern, DOA will continue to develop succession plans, implement cross training opportunities, and build resilient workstreams across departments through consolidation (i.e., supporting through a team rather than dispersed to departments with single points of failure).

Performance Measures

Building a resilient team function framework also provides for employee opportunities and improving performance, with the goal of improving customer service scores. Scores are measured through the customer satisfaction survey, which includes the six metrics of accessibility, accuracy, attitude, operations, timeliness, and communication. The survey gathers feedback on a 1-5 scale.

Stable to increasing scores on customer service satisfaction survey.

2018 Actual	2019 Actual	2020 Actual	2021 Actual	2022 Actual	2023 Actual	2024 Actual	2025 Actual	2026 Goal	2027 Goal	2028 Goal
4.64	4.78	4.19	4.79	4.70	4.85	4.85	4.88	4.90	4.90	4.90

Stable to increasing scores on employee survey question “I understand how my work and assigned goals directly contribute to the overall success of the County meeting its strategic priorities?” The survey scores represent the percentage of DOA employees that agree or strongly agree.

2020	2021	2022	2023	2024	2025	2026 Goal	2027 Goal	2028 Goal
97.00%	96.70%	98.80%	96.80%	97.20%	98.00%	98.00%	98.00%	98.00%

Pillar: Customer Service, Quality, Team

Strategy	Strategy Owner	Timeframe
Share customer service survey results timely and at least quarterly with all DOA employees.	All Divisions	Ongoing
Provide staff and teams opportunities to participate in SOSE and other workplace culture initiatives.	All Divisions	Ongoing
Identify business processes and positions where there is limited subject matter expertise and work to reduce risk by creating resilient work streams.	All Divisions	Ongoing
Review and update existing procedure manuals, operating procedures, policies and process documentation to ensure continuity of business processes.	All Divisions	Ongoing
Identify opportunities to spread organizational knowledge to other positions within DOA or through partnerships with other departments.	All Divisions	Ongoing
Develop DOA experts to provide support to smaller departments, and prepare employee development plans to aid in transitions and employee promotional sequences.	All Divisions	Ongoing
Recognize and encourage SOSE work practices, by sharing employee recognition through their preferred method (e.g., personal, team shout outs, or more formal public recognition).	All Divisions	Ongoing
Increase survey responses by improving access to surveys at points of service delivery such as training sessions, presentations, and service calls.	All Divisions	Ongoing

Pillar: Customer Service, Quality, Team, Finance

Objective 2: Promote Consolidation and Efficiency

Continue to improve Waukesha County's operational efficiency and fiscal decision-making by institutionalizing lean process improvement and cross-department collaboration, while fully leveraging Workday, department Line of Business Applications (LOBs) and responsibly deploying Artificial Intelligence (AI)/automation to standardize and streamline core administrative, financial and operational business processes. The efforts will be focused on establishing measurable reductions in process cycle time, duplicative effort, and administrative cost.

Examples include transitions to biennial budgeting; replacement of the tax collection, listing and billing systems; and adoption of revised business processes and technology that allow centralization of financial and business operations (e.g., customer payment/receipting platforms, application/business process interfaces to streamline LOBs, and data presentation/analysis tools to inform decision makers).

Performance Measures

Strategy owners will report on objective achievement through pre/post implementation metrics analysis such as cycle time in the completion of tasks, business processes, and compliance activities. Projects should also be measured using lean/continuous-improvement methodology. The goal is to provide positive service delivery impacts and success will be measured through ad hoc surveys and stable to increasing scores on customer and employee surveys (See Objective #1).

Pillar: Customer Service, Quality, Team, Finance

Strategy	Strategy Owner	Timeframe
Finance - Implement Workday tools and budget/accounting system software (ClearGov). Improvements will occur over a multi-year period. First year (and ongoing) improvements include simplified statement and budget generation, position management, improved navigation/decreased complexity for budget entry, status reports, and planning/fiscal projections.	Budget, Accounting and Business Services	2026 - Ongoing
Tax System – Review existing application and assess the need for a capital project to replace system using one of the platforms that is commonly used in the State of WI, for the purpose of risk reduction, simplification of tax billing, receipting, and improved integration with other County LOBs.	Accounting and Business Services, Treasurer, Register of Deeds, and Parks and Land Use	2027- 2028
Consolidations – Leverage Workday, AI, expanded analytics capacity, and LOB applications to increase centralization that scales and builds resilient work streams to reduce risk and allow the repurposing of resources for core business functions. Specific steps outlined below:	All Divisions and Departmental Partners	Ongoing
<ul style="list-style-type: none"> • Centralized Finance – use of lean principles to perform centralized financial tasks for small and medium sized departments. 	Accounting and Business Services	2026
<ul style="list-style-type: none"> • Expand shared staffing with the Treasurer’s Office. 	Accounting and Business Services, Treasurer	2026
<ul style="list-style-type: none"> • Expand centralized function pilots such as invoice and contract entry for small and medium sized departments. 	Accounting and Business Services	2026-2028
<ul style="list-style-type: none"> • Business process map functions with the goal of identifying redundancies for reallocation to core services. 	All Divisions, Countywide Stakeholders	2027-2028
Human Resources(HR)/ Payroll, Absence, Time Tracking (PAT) – Error proof processes and enforce pay rule and time entry consistency. Automate to eliminate redundant departmental systems and manual workarounds.	Human Resources, Payroll and ERP Systems, Countywide Stakeholders	2026-2028
Administration Center/Admin Support Services Shared Front Door – Participate in the Administration Center Space/Organizational Study and pursue changes in staffing/locations to facilitate shared and streamlined services.	All Divisions, Countywide Stakeholders	2026-2028

Pillar: Customer Service, Quality, Team

Owner: All Divisions

Objective 3: Maintain Evergreen Policies

Review, update and reissue all DOA policies by year-end 2027. Continue an “evergreen” program where 20% of DOA policies are reviewed annually. Continuous review will improve customer service and ensure policies remain relevant through incorporation of current legislation/regulation, operational changes, and business practice, while eliminating redundant, conflicting, or obsolete content.

Performance Measures

Stable to increasing scores on customer service satisfaction survey (See objective #1)

Posted DOA policies should have a reissue/review date within the last five years by December 31, 2027.

	2025 Actual	2026 Goal	2027 Goal	2028 Goal
Number of Policies	147	140	140	140
% of policies with issue/revision dates within last 5 years	64%	80%	100%	100%
Policies Updated Annually	10	50	28	28

Strategy	Strategy Owner	Timeframe
Implement search functionality to allow intranet users to search policies by keyword.	IT (Information Technology)	2026
Continue “evergreen” cycle of policy reviews.	All Divisions	Ongoing
Reorganize DOA policies from chapter to a purpose format.	All Divisions	2027
Leverage policy reorganization and updates to make improvements to operating procedures/work aids (i.e., separating the “how to” from the underlying policy/county code).	All Divisions	Ongoing
Enable procedures, training materials and live training events that reinforce policy and that are useful in daily operation and easy to find via intranet search or line of business application help functions.	All Divisions	Ongoing

Pillar: Customer Service

Objective 4: Optimize Workday

Implement continuous improvement and quality best practices within Workday business processes. First focusing on stability and error proofing followed by identifying business processes that can leverage Workday efficiencies enabling improved service and resilient workstreams (i.e., fewer single points of failure through centralization).

Collaborate with Workday stakeholders (DOA colleagues, county leadership, departmental subject matter experts, and end-users) to prioritize Workday continuous improvement efforts that deliver the highest combined return on investment (ROI) for Waukesha County operations; balancing risk reduction, staff time saved, compliance, and service delivery impact.

Performance Measures

1. Stable to increasing scores on customer service satisfaction survey (See objective #1)
2. Track improvements against pre implementation baseline using measures such as (a) correction volume, (b) cycle time, (c) number of help desk tickets, (d) payroll adjustments, and (e) corrective journal entries.
3. Improve report and business process availability for “need-to-know” users so departments can self-serve routine needs (e.g., labor distribution, overtime monitoring, vacancy status, and requisition status). Refinements will improve metrics outlined in measure 2 (above) and reduce/eliminate “shadow admin” behaviors (e.g., manual workarounds, working outside Workday because users can’t access reports they legitimately need).

Pillar: Customer Service

Strategy	Strategy Owner	Timeframe
<p>Stabilize and Error-Proof (Control Phase) - Identify and reduce process complexity that drives rework, errors, and manual “workarounds.” Initial focus will be on high-value, near-term improvements (“low-hanging fruit”) with measurable ROI.</p>	<p>All Divisions, Workday Steering Committee</p>	<p>Feb 2027</p>
<p>Complete Workday Implementation -Includes Contract Life Cycle Management (CLM) and a full year of all business cycles to ensure processes are repeatable without error and minimal custom work. Document and develop training.</p>	<p>All Divisions</p>	<p>Jun 2027</p>
<p>Workday Access (WD Security) - Refine Workday security to align business process and report access with defined user roles. Properly aligned security improves data governance, reduces inappropriate access risk, and increases end-user self-service.</p>	<p>Payroll and ERP Systems</p>	<p>2026 and Ongoing</p>
<p>Near-Term Project Improvements – Identify high value projects (e.g., timekeeping, scheduling, recruitment, compliance, automation). Accomplished through Workday configuration, application build out and business process changes (policy procedure, and training).</p>	<p>All Divisions, Workday Steering Committee, Countywide Stakeholders</p>	<p>Ongoing</p>
<p>Training - “One Version of the Truth” (Control Phase) - Training and operational procedure materials will be consolidated into a common, searchable repository and refreshed to match current business processes. Use InvGate Service Portal as the primary front door for finding training and procedures; assuring common terminology, consistent look/feel, and a single authoritative version of guidance for county operations.</p>	<p>All Divisions, Workday Steering Committee</p>	<p>2026-Ongoing</p>

Pillar: Quality, Team, Health and Safety

Objective 5: Deploy Learning Management System

Improve employee understanding and consistent application of county policies, processes, and required training by enhancing access to department specific and countywide course/curriculum – regardless of shift or work location - through the Workday-Learning Management System (LMS), increased on-demand/mobile-friendly content, curated third-party content and learning paths that support onboarding, compliance, and career development.

Collaborate with county stakeholders and consolidate curriculum and access to countywide training (e.g., Human Resources, Fiscal, Risk, Legal and Technology) allowing departments to leverage shared materials for new employee onboarding and refresher coursework. Shared curriculum and course materials will standardize terminology and key messages ('common language') countywide, improve consistency and reduce the effort needed to prepare materials at the department/divisional level.

Performance Measures

1. Stable to increasing scores on customer service satisfaction survey (See Objective #1).
2. Course specific evaluation scores.
3. Percentage of supervisory employees completing aligned training within the calendar year.
4. Supervisory satisfaction with the relevance and applicability of training (Survey results)
5. Number of training programs fully integrated into the Learning Management System (LMS).
6. Frequency of on-demand module access per employee/department.

Stable to increasing score on employee survey question "I understand how my work and assigned goals contribute to the overall success of the county meeting its strategic priorities." The survey gathers feedback on a 1-5 scale.

	2020	2021	2022	2023	2024	2025	2026 Goal	2027 Goal	2028 Goal
Countywide Survey Score	4.51	4.58	4.61	4.57	4.55	4.56	4.60	4.65	4.65
DOA Employee Score	4.75	4.79	4.79	4.80	4.73	4.79	4.80	4.85	4.85

Pillar: Quality, Team, Health and Safety

Strategy	Strategy Owner	Timeframe
Consolidate the delivery of programming and manage employee development through Workday. Workday implementation will assist in the assessment of programming as well as giving employees a tool to manage their personal employee development journey.	Human Resources, Countywide Stakeholders	2026
Improve employee access to training opportunities by enhancing the county training portal to provide a comprehensive up-to-date calendar of programs and curriculum. Integrate all county training programs into a single, searchable portal.	Human Resources, Information Technology	2026
Purchase third-party LMS content to expand training and educational options.	Human Resources, Risk, Countywide Stakeholders	2027
Maintain unique county programming for mentorship, employee development pathways and for countywide initiatives such as technology changes, customer service and lean-CQI.	Human Resources, Risk, Countywide Stakeholders	Ongoing
Increase employee access, flexibility, and engagement by expanding on-demand training offerings across the county.	Human Resources, Information Technology	2026
Ensure all county supervisory employees receive consistent, comprehensive and relevant training by aligning the Management University program with core supervisory competencies, organizational policies, and legal requirements.	Human Resources	Ongoing
Ensure training programs remain relevant, effective, and aligned with employee and departmental needs to maximize satisfaction and performance by conducting regular surveys and feedback sessions. Analyze feedback to identify gaps, emerging needs, and opportunities for improvement. Monitor employee and department needs through survey and feedback sessions to modify and adapt the curriculum as needed to maximize customer satisfaction.	Human Resources	Ongoing

Pillar: Team, Quality, Health Safety, Finance

Objective 6: Conduct Total Compensation Study

Conduct annual assessment of the broader labor market and comparable county employers to ensure the budgeting of competitive compensation and total reward packages to maintain the county’s position as an employer of choice.

Continue the 5-year cycle of conducting a comprehensive Total Compensation and Rewards Study to ensure Waukesha County maintains a modern and competitive compensation structure with the goals of providing competitive pay and benefits, pay equity and internal progression, and expands flexible, non-wage retention and recruitment tools. The outcomes will improve systems and provide a transparent, competitive, and sustainable employment/compensation structure aligned with County service needs and labor market realities providing a workplace culture that attracts and retains quality, high performing employees.

Performance Measures

Maintain a stable to declining regrettable turnover rate.

	2018 Actual	2019 Actual	2020 Actual	2021 Actual	2022 Actual	2023 Actual	2024 Actual	2025 Actual	2026 Goal	2027 Goal	2028 Goal
Regrettable turnover as percent of full-time employment	4.95%	4.80%	4.90%	7.60%	12.00%	7.40%	6.60%	7.40%	5.00%	5.00%	5.00%
Regrettable turnover FTE	68	66	68	106	169	105	94	104	70	70	70

The survey scores represent the percentage of employees that would recommend the county as an employer.

	2020	2021	2022	2023	2024	2025	2026 Goal	2027 Goal	2028 Goal
Countywide Score	83%	82%	86%	82%	85%	86%	86%	87%	88%
DOA Score	93%	94%	91%	88%	93%	93%	94%	94%	95%

Pillar: Team, Quality, Health Safety, Finance

Strategy	Strategy Owner	Timeframe
Leverage Workday and the annual compensation review process to make recommendations that sustain guiding principles (examples): market competitiveness, pay equity, internal alignment, fiscal sustainability, transparency, and retention.	Human Resources	Ongoing
Adjust compensation and rewards programming annually through position and compensation ordinances.	Human Resources, Budget	Annual
Develop initial scope and budget for the Total Compensation and Rewards Study (Comp Study) to be conducted in the 2028-2029 biennium with delivery no later than August 2029 (est. implementation in 2030).	Human Resources	2027
Define/confirm scope, governance, and decision criteria for Comp Study. Scope to include items such as pay structure, job architecture, internal equity/compression, progression, and total rewards (leave/flexibility and select incentives). Establish guiding principles (examples): market competitiveness, pay equity, internal alignment, fiscal sustainability, transparency, and retention impact.	Human Resources	2028
Conduct market benchmarking and internal compensation diagnostics. Items to consider include market competitiveness, pay equity, compression, progression gaps, and alternative benefit options.	Human Resources	2028-2029
Present recommendation to decision makers and develop legislation to implement.	Human Resources	2029
Determine costs and implement recommended salary structure and pay/benefit policy adjustments based on market and available financial resources.	Human Resources	2029 Ongoing

Pillar: Team, Quality, Health Safety, Finance

Owner: Human Resources

Objective 7 : Maintain and Enhance Employee Benefits

Analyze and work to continuously improve employee benefit offerings to provide selections that are comprehensive, meaningful, and deliver high value as part of the total compensation package. Promote the health and well-being of the county workforce by offering programs that address employee needs while mitigating inflationary pressures on benefit costs. This includes healthcare services (e.g., onsite clinic, discounted pharmacy services, care management programming), fiscal, and wellbeing programs (e.g., lifestyle coaching, deferred compensation programs, financial planning and well-being, and EAP services).

Performance Measures

1. Utilization Rates - Success is measured in the utilization rates of the Employee Health and Wellness Center and benefit plan participation rates for programs such as deferred compensation, supplemental voluntary benefits and health/wellness programming (e.g., financial, health, mindfulness).
2. Measures may also include improving participation in preventive and wellness programming and measurement of claims costs/per member in relationship to benchmarks.
3. Maintain Health Insurance premium increases that are at or below the rate of medical inflation.

Year	Medical Rate of Inflation	Pharmacy Rate of Inflation	County Incr. High-Deductible Plan
2019	6.50%	9.00%	0.00%
2020	6.50%	9.00%	5.00%
2021	6.50%	9.00%	13.00%
2022	5.50%	7.50%	2.20%
2023	5.00%	7.00%	2.50%
2024	6.00%	6.00%	2.50%
2025	5.00%	12.00%	1.00%
2026	4.00%	11.00%	4.80%

Pillar: Team, Quality, Health Safety, Finance Owner: Human Resources

Strategy	Strategy Owner	Timeframe
Survey employees to assess their satisfaction with the current total benefits package to identify gaps, improve utilization and ensure offerings align with workforce needs and organizational goals such as retention, employee engagement, and market competitiveness.	Human Resources	2026
Conduct intensive review of PBM (Pharmacy Benefit Manager) to ensure cost efficiency, transparency, and optimal member outcomes to reduce pharmacy cost, improve contract terms and align PBM services with organizational and employee needs. Renegotiate contract or RFP for services if needed.	Human Resources	2026-2027
Evaluate and implement alternative medical and pharmacy arrangements to allow for cost saving opportunities, employee options and plan design flexibility.	Human Resources	Continuous/annual consistent with a cycle of modifying benefits for January 1 plan start
Review report on benefits in areas such as mental health, employee assistance, financial wellness and other benefits outside of traditional insurance to ensure employee awareness, maximize value and explore enhancements that maintain the county's position as a quality employer.	Human Resources	2027
Evaluate and implement special care management programs for insured individuals with specific health needs. Evaluate existing and new programming based on ROI.	Human Resources	Ongoing as part of annual benefit review. Service level changes become effective through budget modification
In partnership with the City of Waukesha, effectively manage the onsite/near site clinic vendor to ensure continued delivery of high-quality, accessible care that drives positive ROI, reduces total healthcare cost, and enhances employee health outcomes and experience.	Human Resources	Ongoing
Annually communicate the full value of employee total compensation to employees via HCM employee self service capabilities and/or home mailing.	Human Resources	April of each year
Conduct annual benefit plan design assessment and benchmark using total compensation studies and external benefits consultants to ensure competitiveness and sustainability.	Human Resources	Ongoing; formal review conducted annually

Pillar: Customer Service, Quality, Finance

Objective 8: Develop a Biennial Budget

Wisconsin Act 42 (2019) granted counties the ability to adopt a biennial budget process. The Budget Division originally investigated the biennial budget option in 2020-21 and received initial feedback from a biennial budget workgroup, which identified operational changes required to have an effective biennial process. This objective directs the Budget Division to build upon that initial review and conduct any additional analysis necessary to support a well-planned two-year budgeting process for the County Board to consider. If approved, technological, process, and policy changes will be implemented to carry out a biennial budget development process during 2027 for the 2028-29 biennium.

Performance Measures

The advantage sought in biennial budgeting is to decrease the total time spent in the budget process in exchange for increased long-term strategic focus. Indicators of success may include:

1. Increased focus on forecasting and stability through increased analysis and multi-year planning.
2. Additional staff time to further integrate and deploy technology (e.g., improved financial reporting, AI).
3. Increased time allotted to budget drivers and program design to maximize program outcomes and increase efficiency.
4. Decreased time allotted to budget preparation and made available for reallocation to centralized finance programming.

Strategy	Strategy Owner	Timeframe
Review strategies and solutions to develop both a road map for implementation and a presentation for policy makers.	Budget	2026
Seek County Board approval for adopting a biennial budget process for 2028-29.	Budget	2026
Implement and roll out biennial budget framework and systems to department heads and budget preparers.	Budget	Nov 2026 – May 2027
Develop proposed 2028-29 budget.	Budget	June – Nov 2027
Analyze and distribute finance responsibilities between staff and across divisions to streamline and maximize efficiency.	Budget, Accounting and Business Services, ERP/Payroll, Procurement	Dec 2027-Feb 2028
Monitor first year 2028 and implement second year (Fiscal Year 2029) budget alignment and levy setting ordinance process.	Budget	July 2028 – Oct 2028

Pillar: Quality, Team, and Customer Service

Objective 9: Unify Technology Planning and Execution

Align IT systems, applications, and services to reduce redundancy, standardize technology use, and ensure cost-effective operations across all departments.

Performance Measures

To unify technology planning and execution across the County, performance will be measured by how effectively departments expand their use of core enterprise systems, reduce or eliminate duplicate and redundant applications, and adopt standardized technology platforms. Progress will also be tracked through the implementation of a formal Business Relationship Management process that establishes consistent engagement, clear roles, and shared planning practices with every department. In addition, performance will reflect the County’s ability to evaluate long-term telecom needs and identify cost-effective, scalable solutions that support future operations.

Strategy	Strategy Owner	Timeframe
Expand use of current Enterprise systems.	All Divisions, Countywide Stakeholders	Ongoing
Identify duplicate/redundant systems.	All Divisions, Countywide Stakeholders	2026
Institute a Business Relationship Management process with all Departments with standard processes and roles.	Information Technology	2026
Evaluate future Telecom needs and potential solutions.	Information Technology	2027

Pillar: Quality

Objective 10: Empower Decision Making with Data

Improve the availability, quality, and analysis of data to enable informed, data-driven decisions that benefit the County as a whole.

Performance Measures

Performance for this objective will be measured by how effectively the County increases the availability, quality, and usability of its data to support informed, data driven decisions. Key indicators include the extent to which departments are actively engaged in identifying shared goals, defining data needs, and participating in collaborative action planning. Progress will also be evaluated through the continued development of countywide data governance practices that establish clear ownership, standards, and processes for managing priority datasets. Success will further be reflected in the reach and impact of data literacy training, ensuring staff across the organization have the skills to interpret and apply data appropriately in their daily work. In addition, the performance of the Data & Analytics Subcommittee of the Waukesha County Technology Alignment Committee (WCTAC) will be tracked through its ability to guide cross department priorities, align analytics efforts, and champion consistent data practices.

Strategy	Strategy Owner	Timeframe
Engage Stakeholders to identify goals/objectives & create collaborative action plans.	Information Technology, Countywide Stakeholders	Ongoing
Continue developing Data Governance county-wide.	Information Technology, Countywide Stakeholders	Ongoing
Data literacy training.	Information Technology, Countywide Stakeholders	Ongoing
Email Phishing Dashboards.	Information Technology, Countywide Stakeholders	2026
Establish Data & Analytics subcommittee of WCTAC.	Information Technology	2026

Pillar: Quality, Customer Service, Finance

Objective 11: Enhance Efficiency with AI and Automation

Leverage AI and automation to support personnel by simplifying routine tasks and customer service processes, improving response times and operational efficiency.

Performance Measures

Performance for this objective will be measured by the County’s ability to identify well-defined, highly repeated workflow processes that can be streamlined, accelerated, or improved through the use of AI and automation. Progress will be assessed by tracking the number and quality of these processes selected for automation, as well as the efficiency gains they produce. Success will also be evaluated through the delivery of education and upskilling opportunities that build employee understanding of AI concepts, responsible use practices, and automation capabilities. In addition, measurement will include the effectiveness of the WCTAC subcommittee in establishing safe, reliable AI and automation use cases that support staff rather than replace them, ensuring that new tools enhance accuracy, improve service responsiveness, and reduce manual workload.

Strategy	Strategy Owner	Timeframe
Implement Website Chatbot.	Information Technology, Communications team	2026
Provide education and upskilling on AI concepts, processes, and use.	Information Technology	Ongoing
Identify well-defined, highly repeated workflow processes that can be enhanced and accelerated using AI and/or Automation.	Information Technology, All Divisions, Countywide Stakeholders	Ongoing
Establish AI and/or Automation use cases through the WCTAC sub-committee that assist staff and other end users in safe and reliable methods.	Information Technology	Ongoing

Pillar: Quality

Objective 12: Safeguard County Assets and Data

Strengthen cybersecurity measures to protect data, ensure regulatory compliance, and guide safe and appropriate technology use through clear policies and procedures.

Performance Measures

Performance for this objective will be measured by how well the County strengthens cybersecurity practices, protects sensitive data, and maintains regulatory compliance. Key indicators include improved centralized tracking and support of records requests, as well as completion of the updated incident response plan. Additional measures include implementing Role-Based Access Control and enhancing the software review and risk assessment process to ensure secure and compliant technology adoption. Ongoing annual cybersecurity tabletop exercises, along with follow-up actions, will also be used to evaluate preparedness and continuous improvement.

Strategy	Strategy Owner	Timeframe
Enhance centralized tracking and support of Records requests.	Information Technology, All Divisions, Corporation Counsel	2027
Complete updated incident response plan.	Information Technology	2027
Implement Role Based Access Control processes.	Information Technology, All Divisions	2026
Enhance Software Review/Application/System Risk Assessment process.	Information Technology	2026
Continue annual Cybersecurity tabletop exercise and subsequent follow-ups.	Incident Response Team[1]	Ongoing
Evaluate and enhance phishing education and compliance requirements to improve overall employee performance.	Information Technology	Ongoing

[1] The Incident Response Team consists of staff from Emergency Preparedness, Corporation Counsel, Risk/Compliance, Human Resources, County Executive Office, County Board, and IT.

Pillar: Quality, Team, and Customer Service

Objective 13: Promote Collaboration, Innovation and Adaptability

Promote partnerships and a culture of collaboration, innovation, and adaptability to assist the County in embracing rapidly evolving technology.

Performance Measures

Performance for this objective will be measured by how effectively the County strengthens collaboration and innovation across departments through shared planning and transparent decision-making. Key indicators include improved alignment of technology planning and execution, demonstrated by increased cross-department participation and clearer coordination of priorities. Success will also be evaluated through the standardization of IT processes that reduce redundancy and create consistent practices across the organization. Another measure is the increased transparency and speed in prioritizing IT resources, ensuring departments understand how decisions are made and can access support more efficiently.

Strategy	Strategy Owner	Timeframe
Align technology planning & Execution across all departments.	Information Technology, Countywide Stakeholders	Ongoing
Standardize IT processes to reduce redundancy.	Information Technology	Ongoing
Increase transparency & speed for prioritizing IT resources.	Information Technology	Ongoing

Pillar: Finance, Customer Service, Health and Safety

Objective 14: Complete Comprehensive Fiscal Risk Analysis

The County faces a recurring fiscal deficit due to revenue growth (e.g., levy limits, lack of state/federal support for mandated services) being outpaced by inflationary expenditure growth. Under this fiscal environment it is necessary to close this gap through prioritizing services, collaboration/consolidation, and maximizing revenue growth where allowable. It is also necessary to create sustainable internal service funding to ensure risks are appropriately managed and that these funds can sustainably provide expected services.

Performance Measures

All Funds Countywide

Maintain stable unassigned fund balance as a percentage of General and Special Revenue to provide necessary working capital to avoid cash flow interruptions and short-term borrowing to fund daily operations and to maintain the County's Aaa/AAA bond ratings.

	2022 Actual	2023 Actual	2024 Actual	2025 Est.	2026 Est.	2027 Goal	2028 Goal
Unassigned Fund Balance (Millions)	\$60.20	\$60.90	\$63.30	\$63.60	\$58.00	\$56.30	\$55.20
Percent of Unassigned Fund Balance to General/Special Fund Expenditures	25.80%	25.10%	25.10%	26.40%	22.30%	21.00%	20.00%
Bond Rating Moodys/Fitch	Aaa/AAA	Aaa/AAA	Aaa/AAA	Aaa/AAA	Aaa/AAA	Aaa/AAA	Aaa/AAA

EUTF

Manage general fund balance subsidy to End User Technology (EUTF) and application EUTF reserves to ensure stable interdepartmental charges ensure equipment replacement funding.

	2022 Actual	2023 Actual	2024 Actual	2025 Budget	2026 Budget	2027 Goal	2028 Goal
EUTF Fund Balance	\$165,103	\$138,368	\$138,368	\$447,252	\$178,426	\$200,000	\$200,000
General Fund Balance	\$475,000	\$475,000	\$475,000	\$475,000	\$725,000	\$700,000	\$700,000

Pillar: Finance, Customer Service, Health and Safety

Risk

Manage general fund balance subsidy to Risk Management and the application of Risk Management reserves to ensure stable departmental charges and adequate coverage.

	2022 Actual	2023 Actual	2024 Actual	2025 Actual	2026 Actual	2027 Goal	2028 Goal
Risk Fund Balance	\$50,000	\$50,000	\$52,249	\$50,000	\$80,000	\$60,000	\$40,000
General Fund Balance	\$215,500	\$215,500	\$215,500	\$194,250	\$413,404	\$325,000	\$270,000

Maintain Confidence Level minimum of 50% or greater, preferably 75% or above, to ensure stability and minimize operational disruptions and fiscal distress caused by large insurance losses.

2022 Actual	2023 Actual	2024 Actual	2025 Actual	2026 Actual	2027 Goal	2028 Goal
\$5,741,564 @ 75-85% confidence level	\$6,030,538 @ 75-85% confidence level	\$6,354,865 @ 75-85% confidence level	\$7,129,143 @ 75-85% confidence level	\$7,663,829 @ 75-85% confidence level	\$8,238,616 @ 75-85% confidence level	\$8,856,512 @ 75-85% confidence level

Strategy	Strategy Owner	Timeframe
Produce financial forecasting models countywide, for annual budgeting and longer-range financial condition assessment.	Budget	Annually
Recommend cost saving and revenue generating measures countywide.	Budget	Annually Mar – Aug
Conduct comprehensive analysis of financial health of the DOA enterprise funds (Risk Management , Collections, End User Technology-EUTF) and implement strategic program changes to ensure long term funding stability, and equipment replacement reserves.	Accounting and Business Services, Information Technology, Risk Management	2027
Work toward increasing year end Risk Management reserve confidence level to provide greater margin for possible adverse deviation from expected losses. Higher confidence levels reduce the risk that funding will be inadequate for a given year and helps avoid budget fluctuations and potential shortfalls.	Risk Management, Accounting and Business Services	Ongoing
Work toward increasing Risk Management retained earnings beyond claims payable reserve levels to provide responsible budget flexibility to fund catastrophic losses above insurance policy limits, uninsured claims, and provide a buffer for changes in actuarial determined reserves based on large claim payouts or adverse claims trends.	Risk Management, Accounting and Business Services	ongoing

Appendix A

Department of Administration Environmental Scan

Summary

There are increasing demands for county services but hard limits on financial and human resources, which is making it increasingly difficult to meet countywide objectives. As such, future efforts must focus on efficiency and program prioritization.

Focusing on efficiency is also supported by survey results. The Department of Administration (DOA) surveyed customers, and they affirmed the importance of streamlining existing services and providing enhanced or new services that produce end user efficiency gains. Six program areas/related themes were distilled from the broad countywide environmental scan and survey. A seventh theme was added to meet the challenge of doing more with limited resources.

Key Themes from the DOA Environmental Scan

- **Workday Optimization and Training** - Workday is central to nearly every division, but it is a new product and there is a need to optimize business practices and improve the end user experience. The end user also needs to become more skillful through training and continued application familiarization. DOA customers recognize opportunities and have a strong desire for streamlined processes, improved reporting, and improving the fit with departmental workflows.
- **Interdepartmental Collaboration** - Collaboration with DOA is generally seen as positive by our customers, especially with HR, IT, and Budget. However, there are communication gaps around project management, technology rollouts, policy changes and timelines. Departments want more proactive engagement, clearer expectations, and regular updates on cross-divisional initiatives.
- **Technology Modernization** - Requests for unified technology planning, automation, and Artificial Intelligence (AI) are frequent. Departments want to reduce redundancy, improve data-driven decision-making, and enhance cybersecurity. There is a call for more transparency in IT equipment ordering, better documentation, and the development of user groups to share best practices.
- **Talent Management and HR Support** - Recruitment, retention, and compensation are top concerns. Departments want more direct HR support for hiring, investigations, and personnel matters, beyond consultation. Employee engagement, benefits, and talent development are also recurring priorities identified in survey responses.

Appendix A

Department of Administration Environmental Scan

- **Financial Processes and Reporting** - Departments seek more efficient payroll and accounting processes, direct deposit for service providers, and improved comprehensive financial reporting. There is a need for simplified financial policies and better tools for budget forecasting and preparation.
- **Policy Modernization** – Conduct a comprehensive review and update of departmental and procurement policies to ensure they reflect current practices, regulatory requirements, and workforce needs. Emphasis will be placed on clarity, consistency, and adaptability to evolving organizational and procurement environments. Safety training and risk management process improvements are also highlighted.

Summary Theme/Objective

- **Business Process Streamlining** - It is difficult to support each department’s unique requirements by acting as extension of their business office. To do more with “the same level of resources”. A focused approach to maximize efficiency while maintaining accountability through consolidation may allow resources to be more appropriately applied to core customer services and to meet the efficiency themes identified by DOA customers.

DOA Statement of Purpose

The mission of the Department of Administration (DOA) is to assist other county departments and strategic partners by providing standards and support systems for human resources, financial/risk management, information technology, procurement, and other support services. DOA initiates enhancements and promotes efficiencies to serve customers, who are primarily internal departments and their employees. Through these efforts, DOA seeks to continuously improve and enable better service to county departments and ultimately the citizens of Waukesha County. The mission remains the same for 2026-2028, but with increased urgency on efficiency, prioritization and new methods due to the increasingly tight financial forecast.

2025 Scanning Process

DOA shared financial, workforce and economic data with the County workgroup assigned to develop the broader countywide environmental scan. The countywide scan included analysis of trends and expectations. As a continuation of the scanning process, all departments are asked to create a department specific environmental scan that combines the shared broader observations along with a deeper review of department specific challenges and opportunities. DOA’s environmental scanning for the 2026-2028 Strategic Plan used a three-phase approach.

Appendix A

Department of Administration Environmental Scan

- **Countywide** - The first phase, as in the summary, involved sharing information with and between county departments. Community demographics, health/wellness indicators, economic trends and the legislative/policy trends were evaluated along with county program performance and a review of financial and human resources. Through this process it became clear that there are increasing demands for county services but hard limits on available financial and human resources.
- **Voice of Customer (VOC)** - The second phase brought the VOC through a survey conducted in September 2025. The survey was distributed to all county employees, and it confirmed the broad objectives of increasing efficiency through streamlining process and enhancing or providing new services that result in end user efficiency gains.
- **Result Sharing/Brainstorm** - The third phase of scanning began with the share out of survey results to DOA employees at the Fall ALL-DOA meeting (October 15, 2025). The sharing and brainstorming process continued at our February 2026 All-DOA meeting and was instrumental in the build out of strategic plan objectives.

Voice of the Customer

As outlined in the DOA three-phase approach to scanning, the 2026-2028 process used a survey to conduct focus group type information gathering. This September 2025 survey asked a series of ranked and open-ended questions. These included:

1. **An open-ended assessment of the Department of Administration where respondents were asked to list up to three:**
 - Key Strengths and Efficient Processes
 - Challenging Processes
 - Explore Areas for Improvement
2. **An open-ended Department of Administration SWOT Analysis where respondents could list up to three Strengths, Weaknesses, Opportunities and Threats.**
3. **Open-ended questions related to their department's strategic alignment with DOA:**
 - What recent or upcoming initiatives in your department may need support and/or assistance from the Department of Administration?
 - How can the Department of Administration better support your department's strategic initiatives?
 - What technological improvements should the Department of Administration consider assisting to your department?
 - Please share experiences where inter-departmental collaboration with the Department of Administration has been successful.

Appendix A

Department of Administration Environmental Scan

- Share any areas where inter-departmental collaboration with the Department of Administration could be improved.
- What are three services not currently offered by the Department of Administration that you believe would be beneficial for your department?

4. A prepopulated list was also provided allowing respondents to rank order priorities by division.

These rankings will be used to develop 2026-2028 strategic plan objectives for 2026-2028 and to ensure DOA is on the right path in satisfying customer needs.

The open-ended questions were reviewed and resulted in the six themes included in the environmental scan summary. Qualitative analysis was used to summarize responses as themes creating an actionable format. These themes were shared with DOA employees as part of rolling out survey results to divisions between November and January. The results roll out included divisional brainstorming in advance of strategic planning at focused All-DOA meeting in February 2026.

Customer ranked priorities were shared at the October 2025, All-DOA Meeting. DOA leadership and staff considered survey results to be positive in that the priorities, themes and objectives identified by customers are all in close alignment with DOA’s leadership identified priorities.

What follows is a table display of customer priorities by DOA division. The higher the numeric ranking the more intense customer priority. The aggregate results generally support the mission of DOA to provide policy and infrastructure that allows for a safe and efficient work environment and enough resource room to allow for continuous improvement.

IT Divisional Priorities

Priorities	Priority Details	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Ranking
Unified technology planning and execution	Aim to unify IT systems, applications, and services to cut down redundancy, standardize technology use, and ensure cost-effective operations across all departments.	8	8	9	1	2	15.65
Safeguard County Assets and Data	Strengthening our cybersecurity measures to ensure data safety and compliance with regulations, using clear policies and procedures to guide safe and appropriate technology use.	10	4	3	6	5	15.5
Empowering Decision-Making with Data	Improving the availability and analysis of data, to support enhanced data-driven decision-making to benefit the County as a whole.	3	7	9	6	3	11.6
Promoting Collaboration, Innovation and Adaptability	Encouraging partnerships for a culture of collaboration, innovation, and adaptability to assist the County with embracing ever changing technology.	4	6	3	9	6	11.45
Enhancing Efficiency with AI and Automation	Use AI and automation to assist personnel by simplifying routine tasks and customer service processes, improving response times and operational efficiency.	3	3	4	6	12	9.73

Appendix A

Department of Administration Environmental Scan

Budget Division

Priorities	Priority Details	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Ranking
Biennial Budgeting	Enhance processes and develop a 2-year budget cycle for efficiency and increased analysis.	6	4	1	1	2	8.98
Financial Forecasting	Leverage Workday analytics to enhance financial forecasting capabilities.	4	3	4	3	0	7.58
Budget Preparation	Utilize analytical/reporting tools to create standard templates for departments to use for their budget and status report preparation.	3	3	4	3	1	6.78
Forecasting Accuracy	Implement accurate data-driven forecasting models.	1	3	3	4	3	5.1
Measurement and Transparency	Enhance department program reporting in the budget document and standalone reporting to provide great insight on program efficiency and effectiveness.	0	1	2	3	8	3.52

Business Services Division

Priorities	Priority Details	Priority 1	Priority 2	Priority 3	Ranking
Integrate Credit Card Processing	Optimize and streamline credit card transaction processing both in person and online.	3	5	0	5.5
Financial Reporting	Develop comprehensive status report templates for departmental status reports using Workday.	3	0	5	4.67
Collections Management	Streamline delinquent receivable collection processes to improve efficiency and recovery rates.	2	3	3	4.5

Accounting And Payroll Division

Divisional Priorities	Priority Details	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Priority 7	Ranking
Workday-Financial Stabilization	Ensure stability and optimization in financial processes within Workday.	7	7	2	1	0	1	0	11.58
Processing Time	Implement initiatives to reduce time and effort in processing payroll and accounting entries.	3	3	4	9	2	1	7	9.65
Optimize Payroll and Timekeeping Processes	Streamline payroll operations to reduce errors and processing time.	2	2	4	7	0	1	0	6.25
Financial Policy Simplification	Streamline financial policies to reduce complexity and enhance service delivery.	2	2	1	0	6	5	1	5.51
Financial Reporting	Develop comprehensive financial reporting capabilities using Workday for departments.	1	1	4	3	4	1	2	4.84
Workday-Payroll Stabilization	Ensure stability and optimization in Payroll processes within Workday.	2	2	3	1	2	1	0	4.82
Fixed Asset Management	Develop efficient fixed asset tracking and reporting processes in Workday	0	0	1	1	1	6	5	2.5

Appendix A

Department of Administration Environmental Scan

Human Resources Division

Divisional Priorities	Priority Details	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Priority 6	Priority 7	Ranking
Workday-Financial Stabilization	Ensure stability and optimization in financial processes within Workday.	7	7	2	1	0	1	0	11.58
Processing Time	Implement initiatives to reduce time and effort in processing payroll and accounting entries.	3	3	4	9	2	1	7	9.65
Optimize Payroll and Timekeeping Processes	Streamline payroll operations to reduce errors and processing time.	2	2	4	7	0	1	0	6.25
Financial Policy Simplification	Streamline financial policies to reduce complexity and enhance service delivery.	2	2	1	0	6	5	1	5.51
Financial Reporting	Develop comprehensive financial reporting capabilities using Workday for departments.	1	1	4	3	4	1	2	4.84
Workday-Payroll Stabilization	Ensure stability and optimization in Payroll processes within Workday.	2	2	3	1	2	1	0	4.82
Fixed Asset Management	Develop efficient fixed asset tracking and reporting processes in Workday	0	0	1	1	1	6	5	2.5

Risk and Procurement Division

Divisional Priorities	Priority Details	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Ranking
Procurement Systems and Policy Modernization	Modernize procurement systems and policies to reduce complexity, align with current purchasing standards, and enhance service delivery.	7	2	2	1	0	8.92
Risk Management Processes and Safety Trainings	Strengthen risk management through comprehensive process improvement and safety training offerings.	4	4	0	4	0	7
Contract Lifecycle Management	Provide a platform for more consistent contract management/contract lifecycle management on a countywide basis.	1	2	3	5	1	4.45
Supplier Management	Advanced supplier management processes to provide consistency within departments and maximize the effectiveness of county-wide buying power.	0	3	4	2	3	3.93
Workers' Compensation Processes	Streamline workers' compensation claim submission processes and lifecycle of the claim tracking for efficiency.	0	1	3	0	8	3.1

Appendix A

Department of Administration Environmental Scan

Combined Countywide and DOA Environmental Scan

Economy – Like all county departments, DOA benefits from and faces the same headwinds from local economic conditions. The County has an excellent and stable financial position as recognized by its triple-A bond rating, reflecting strong financial management, considerable budgetary flexibility and the available but unused authority to implement a half-percent sales tax. Waukesha County also benefits from a large, diverse tax base with strong resident income.

However, the County is both simultaneously in a good financial position in terms of having a triple-A credit rating and operationally stressed by not being able to generate sustainable revenues to match inflation due to state-imposed levy limits.

Levy and Service Delivery - The state-imposed levy limits, which tie property tax levy growth to increased net new construction, result in modest annual levy increases. These annual increases have been around 1.5%. For 2026, the budget gap was \$4.1 million which was primarily driven by an allowable levy increase of less than 1.5% and an inflation rate that was more than double.

Closing the gap requires creativity and problem solving to streamline existing processes while meeting service delivery expectations. The County has successfully leveraged lean problem solving to close the gap each year. However, closing the budget gap is increasingly difficult based on expected modest revenue growth.

The 2026 budget includes transferring on-going capital project downpayment revenues to the operating budget, increased debt financing, targeted use of fund balance, maximized revenues and reduced staffing. The County continues to pursue state legislative change with limited success. Wins at the state level often do not solve longer-term local funding issues due to their short-term nature. The next three years will require the County to focus on strategies to develop new revenue sources, modify service delivery and levels (i.e., decrease), and pursue legislative changes. The key will be to develop sustainable solutions that do not create budget holes while managing service delivery expectations.

Inflation - Inflation has subsided from the prior strategic planning period, but the County is still recovering from the inflationary effects of the pandemic. Additionally, annual inflation at around 3% is greater than revenue generating capacity. The past few years have required techniques such as the temporary use of fund balance to phase-in inflationary costs associated with increases in wages, energy costs, capital, technology, healthcare and insurance. The planned use of fund balance is a useful tool to avoid haphazard budget cutting, but it also creates a budgetary hole that must be mindfully structured to avoid future budget problems.

Appendix A

Department of Administration Environmental Scan

One-Time Revenue – Pandemic era funding (ARPA) has all been spent. That influx of one-time federal funding was accompanied with county budgetary and political resolve to limit the use of these funds to focus them on cost avoidance investments and projects with a positive long-term return which left the County well positioned. The recovery of indirect costs and reallocated base expenditure authority for pandemic response increased unassigned fund balance which partially masked the impacts of the slow growing property tax levy. Now that these funds are spent, there will be increased pressure on the use of fund balance to maintain operations. Tapping into fund balance to maintain ongoing operations would be against policy and long-standing practice and over time would result in structural budget problems.

Facility/Work Environment Expectations - The reconstruction of the 1959 courthouse presented significant opportunities and challenges. Renovation included the temporary relocation/disbursement of DOA information technology staff throughout the campus. This decentralized staffing approach required strong teamwork and reliance on remote work technology. DOA-IT successfully met the challenges and has taken advantage of opportunities to design the new workspaces and technical resources to improve productivity, security and employee amenities for years to come. When the offices are completed in late 2026, IT staff will have new collaboration space, areas for managers and teams to be collocated and enhanced customer service areas. The courthouse renovation also replaced a portion of IT infrastructure including the relocation of the server room. These renovations have been thoughtfully executed and provide a layer of technical redundancy and security that has strengthened DOA and overall County IT operations.

Office Space - The planning exercises undertaken as part of the courthouse renovation also identified the need to provide better space utilization in the Administration building. For several years, the County has emphasized building and retaining an effective workforce through professional development and training, but the current meeting rooms are small, limiting sessions to fewer employees or requiring offsite travel to the larger Emergency Operations Center.

As departments and divisions have changed, the Administration center also has uneven distribution of staff within offices, creating areas of crowding and other relatively vacant areas. Examples in DOA include overcrowded HR, Procurement/Risk and Collections offices.

There is a need for added privacy within office suites, specifically within the DOA Human Resources division. DOA-HR maintains significant amounts of sensitive data and the nature of human resources frequently involves confidential conversations. The current DOA-HR office suite does not have controlled access or sufficient private office/conference capabilities to conduct business efficiently.

Appendix A

Department of Administration Environmental Scan

Analysis of administration center office space is included in the 2026 budget. This is an opportunity to provide better service to the public and for departments to examine collaborations/consolidations. Improved space utilization should be a tool to drive further efficiencies.

Customer Service – DOA is proud of its overall customer satisfaction scores, which averaged 4.85 in 2024 and 4.88 in 2025. DOA consistently exceeds the County’s benchmark standard of 4.65. However, survey feedback points to multiple improvement opportunities.

Changing processes is sometimes difficult for end users to navigate. With increasing workload, complexity, and the acceleration of change led by technology, employees are increasingly adaptable but also concerned about their ability to meet future expectations. It is necessary to communicate not only the change but the reasons why. Survey feedback points towards the need to improve communication frequency, clarity and find new methods to match the volume of change and decrease uncertainty.

DOA Specific

Investments in enterprise-wide applications and progress towards increased digital record management, customer self-service, process automation, data analytics and artificial intelligence are ways for DOA to meet customer expectations while dealing with increased workloads. This will require investments in technology, employee up-skilling and the acquisition of new skill sets. Optimistically, the idea of providing one-time project resources to free up base resources through efficiency gains is the goal.

These processes and technological efforts not only apply to DOA, but they also apply to our customers in departments. The professional, technical, project management, financial and consultancy skills DOA provides to departments will continue to be in high demand. Measures will need to be taken to acquire sufficient resources to meet demand and manage requests to focus resources on projects that have the highest return.

Human Resources/Business Process - The Great Resignation and resultant significant labor shortage has passed in many job categories. However, the market has changed with fewer applicants per job opening and with certain jobs lacking their historical appeal. To counteract labor market trends the County must focus on remaining a preferred employer in a competitive market. Employee tenure is shortening and an increase in focus on compensation, benefit flexibility, employee development and workplace culture consistency will be key.

Appendix A

Department of Administration Environmental Scan

During the period between 2022 and 2025 the percentage of employees with five or fewer years of county experience grew 45% to 48%. This trend is even more pronounced in comparison to 2012 when county work experience was more evenly distributed and with the largest percentage of the workforce having twenty or more years of experience at Waukesha County. As overall tenure of County employees decreased reflecting the departure of the baby-boom generation from the workforce, the County also experienced increased turnover due to the tight labor market and likely generational expectations related to job growth. Turnover not only increases direct costs, but it also has led to a loss of institutional knowledge. To counteract these trends there will be an increase in reliance on DOA-HR to help guide workplace culture and to establish training programs that develop talent and encourage retention.

Business processes and policy review continue to be an area of DOA focus. By identifying areas of inefficiency and procedural bottlenecks, DOA seeks to address areas identified as cumbersome by customers. Reducing complexity through review of policy to add focus on analysis and systems that add value to decisions rather than “just following process” will make it easier to interact with DOA and drive agile decision making. Data informed decision-making geared toward finding high-value contributions in purchasing, contract development, online services, process automation, artificial intelligence, ecommerce, and content management are some areas identified for strategic planning focus.

Streamlining sounds easy, but it comes with significant effort to revisit and revise policy to ensure appropriate internal controls, compliance with law and regulation, and management of risks. DOA assumes significant responsibility in these areas and will need to work collaboratively with all business partners, both internal county departments and external partners, such as state and local governments, non-profits and outside vendors. Governance and the management of shared responsibilities, along with compliance in areas such as PCI (payment card industry standards), DLP (data loss prevention standards), PII (personally identifiable information) and HIPAA (Health Insurance Portability and Accountability Act) have been identified as areas of high importance in the strategic planning process.

Enterprise Resource Management Systems (ERP) - The replacement of the ERP and human resources information systems (HRIS) is mostly complete with the implementation of Workday. The primary objectives to expand capacity to make management decisions, combined with increased end user ease have been met but with the identified need to continuously improve business processes.

Appendix A

Department of Administration Environmental Scan

Workday go-live occurred in the April/May 2025 timeframe. The County has yet to experience one full business cycle with Workday. As DOA continues to implement and troubleshoot, movement toward the continuous improvement phase is simultaneously occurring. The identification of projects to improve performance is paramount. Focusing on high value improvements will increase end user capacity and overall county performance.

Continuous improvement also requires new skills to develop within DOA and end user departments. Many times, this includes stretch goals for employees, increased coaching and establishing supportive development opportunities. It also includes reshaping staff structures that offer new opportunities to current employees and seeking external talent when needed. The implementation of Workday, the ongoing pressure to streamline and operating budget pressures require DOA to offer effective enterprise-wide solutions not only in the development of systems but also the human resources that ultimately implement revised business processes.

Transition Planning - The County will need to continue to look at succession planning. While there are fewer employees in DOA planning to retire in the next few years, there remains a significant portion of county employees reaching retirement age, and these institutional knowledge concerns are further compounded by a reduction in overall employment tenure.

The probability of having long-term stability in positions and relatively predictable transitions has decreased. The need for transition planning, policy and procedure documentation and cross training point toward a countywide need to develop recruitment/skill development and compensation programs that attract, develop, and retain employees. Budgetary constraints will likely mean staff will be distressingly vulnerable to the loss of even a single member (both in professional and administrative support categories). A greater emphasis will need to be placed on documenting specialized functions. This requires time and the assignment of responsibilities unrelated to employee core tasks and will need to be prioritized more than in the past.

Training - Employee development is essential, and the County will continue to develop incentives through the performance evaluation process for building expertise, while providing opportunities for individual growth and training. Established programs such as SOSE (Standards of Service Excellence), Management University, Introduction to Supervision and Lean Management develop skills and prepare employees for promotional opportunities. The survey expressed confidence in these programs and a desire to continue and expand these programs to prepare workers for leadership roles and to support all personnel in accepting broader responsibilities.

Appendix A

Department of Administration Environmental Scan

Technology - Technology use within county government and among its customers continues to grow. Trends toward cloud, e-commerce, remote work, and end user driven systems enable more functionality and services available to internal and external customers. This “always on – always accessible” expectation requires increased dependence on information technology and the support services to implement/manage systems and mitigate risk.

Continued strategic investment in technology and a focus on system and process effectiveness/efficiency results in productivity and subsequent return on investment. Enhancements to information management, IT security, business continuity and data access will continue to develop. The increased use and access of data means that IT security is an ever-increasing responsibility, and the need to protect data and follow sound information governance policy is critical.

Investment in IT security, business continuity, and disaster recovery will assist in reducing cyber-attack vectors and help ensure confidentiality, integrity, and availability of information/data. An evolving, multi-tiered approach will provide protection from internal/external threats and keep public trust and brand reputation intact.

The post-pandemic world has accentuated the need to focus on improving the delivery of digital government services through the development of the external website. Enabling anytime, anywhere, and any-device alternatives to in-person, paper-based services will provide operational efficiencies and increase constituent satisfaction.

The reality of continuous technological change requires increased employee training, both internal to DOA-IT and at the end-user level. Technology is not a centralized IT responsibility alone. Portions of traditional information technology responsibilities continue to shift to end-users and business-specific subject matter experts act as application administrators. This creates efficiencies and it also requires increased focus on effective end-user solutions and the development of end-user expertise, documentation, and business continuity. The focus on end-user applications and lean IT staffing results in IT expertise in some areas being “one-person deep,” requiring the need for supplemental outside resources and prioritization of core functionality.

DOA will continue to invest in people, process, and application efficiencies to enable IT services and deliver business objectives and goals. Focus group and survey feedback identified opportunities for improvement in project initiation, prioritization, and visibility; IT Service Desk responsiveness, ticket entry mediums, and communication alternatives; and automation/standardization of forms and tasks.

Appendix A

Department of Administration Environmental Scan

DOA Brainstorming Session – All DOA Meeting

On February 11, 2026, DOA held its Spring All DOA Meeting focused on strategic planning. It included a brainstorming session where employees were asked to compare environmental scan and strategic themes to those identified in the countywide environmental scan. Attention focused on the common themes and priorities identified across the department and employees were asked to share their thoughts on interdepartmental alignment and to suggest approaches for DOA to take to address both internal needs and to address customer expectations. The outline that follows captured major themes and suggestions and provided a solid starting point for the development of strategic objectives and strategies.

Employee Survey Breakout Group – Themes/Suggestions

- 1. Employee recognition and celebration of accomplishments:**
 - a. Recognition that is “low friction,” timely, and human
 - b. Equitable and consistent recognition—across roles, shifts, and “invisible work”
 - c. Psychological safety varies by supervisor; staff want multiple safe channels
- 2. Communication**
 - a. Manage communication channel sprawl to eliminate missed messages and duplicate work
- 3. Performance Management**
 - a. Performance management needs to be role-relevant, measurable, and continuous
 - b. Improve the connection between daily work with strategic objective outcomes
- 4. Job Knowledge**
 - a. Improve knowledge sharing and transfer between employees
 - b. Ownership to ensure one version of policy/training, relevance and elimination of obsolete content
- 5. Work Structure Schedule**
 - a. Explore balancing coverage needs with staffing models that provide flexibility (e.g., 4-10 hour days, flex scheduling, etc.)

Appendix A

Department of Administration Environmental Scan

Human Capital Management Breakout Group – Themes/Suggestions

1. **Continuous improvement**
 - a. Improve Workday user experience
 - b. Maximize business process efficiency
2. **Time tracking/scheduling**
 - a. Improve standardization,
 - b. Use AI/automation
 - c. Increase visibility (e.g., scheduling integrations with Workday)
3. **Training**
 - a. Improve employee capacity through targeted, timely training
 - b. Provide one version of truth
 - c. Provide through multiple platforms (e.g., video, job aid, in person)
4. **Reporting**
 - a. Create dashboards and reports of common management needs (e.g., budget status, head count, PTO, schedule coverage)
5. **Standardization**
 - a. Streamline through consistent and common operating procedures
6. **Safety**
 - a. Implement learning opportunities consistent across departments
 - b. Train the trainer
7. **Talent Acquisition**
 - a. Shorten timeline
 - b. Improve the application process
8. **Recruitment**
 - a. Expand recruitment channels and develop relationships with schools, professional organizations
9. **Pay/Career**
 - a. Address equity, compression issues
 - b. Develop promotional sequences and progression roadmaps
10. **Compensation**
 - a. Explore work flexibility as an alternative to pay
 - b. Relocation incentive
 - c. Expand benefits for PTO, parental leave and other leave related benefits

Appendix A

Department of Administration Environmental Scan

Technology Breakout Group - Themes/Suggestions

1. Enhance Efficiency with AI & Automation

- a. Provide comprehensive AI training and share effective use cases
- b. Integrate systems for streamlined data entry and replication
- c. Ensure mindful implementation of AI, considering ethical usage, environmental impacts, and costs

2. Safeguard County Assets & Data

- a. Implement measures to block malicious emails and educate users on email security
- b. Maintain regular feedback and consistent communication standards across departments.

3. Unify Technology Planning & Execution

- a. Create a centralized training and information hub
- b. Foster knowledge sharing through working committees, user groups, and subject matter expert groups
- c. Improve understanding of the full business process to ensure staff awareness of task dependencies

Finance Breakout Group - Themes/Suggestions

1. Policy Modernization

- a. Easy to find locations
- b. Add Policy/Procedure to Learning Management System
- c. Standardize processes

2. Leverage Existing Workday Features

- a. Use the features to take advantage of modern technology
- b. Use search, dashboards, integrations

3. Enhance User Experience

- a. Training general and specific to roles
- b. Self-directed help – use of search functions

4. Workplace Supports – Improving Mental Health

- a. Break the Stigma around asking for help or resources
- b. Leverage county expertise in HHS and HR
- c. How to have conversations regarding this type of topic
- d. Balancing needs with job development
- e. Better defined job responsibilities - enhanced direction/prioritization
- f. Less “meeting hell”
- g. Zen Room
- h. EAP programming
- i. Freebies such as park passes
- j. Environment improvements such as Food Trucks, Picnics

Appendix A

Department of Administration Environmental Scan

DOA Conclusion

Departmental partners and DOA employees built this environmental scan through their willingness and active participation in surveys, focus groups, team meeting and braining storming sessions. Their work is reflected in the strategic plan objectives.

Significant opportunities and challenges exist. DOA is well situated to make significant progress through the pursuit of continuous improvement which will enable better service to departments and the residents of Waukesha County. DOA looks forward to addressing the scan through strategic plan implementation.