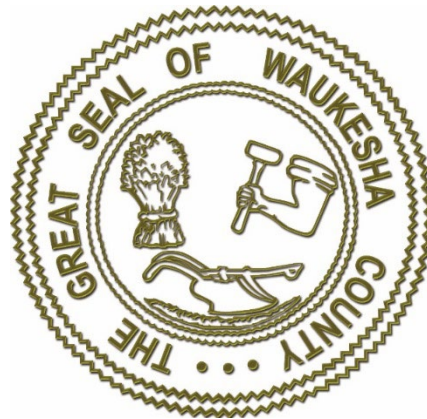


Waukesha County Office of the County Clerk

Strategic Plan

2026 - 2028



"The County Clerk's office serves Waukesha County with accurate, accessible, and transparent elections and public records services. Leading the way with strong integrity, and responsive customer-focused support."

-Margaret Wartman, County Clerk

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 [Jump to Strategic Objectives](#)

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Reader’s Guide: How to Read the Strategic Plan

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Thanks for reading Waukesha County Clerk’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.

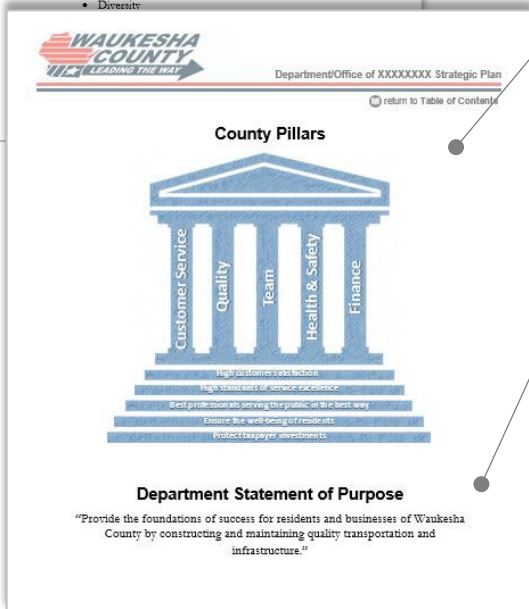
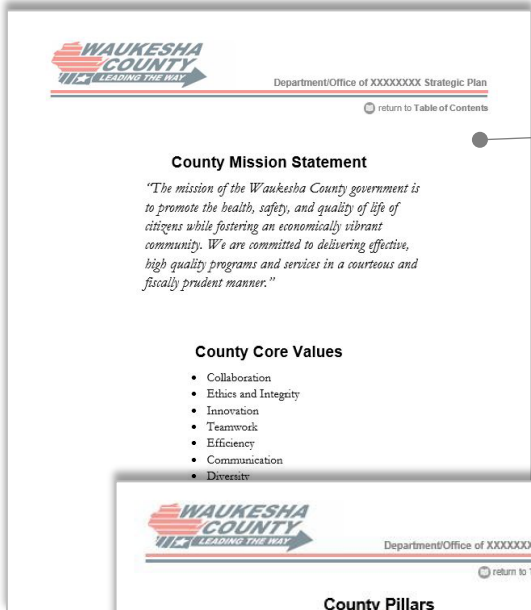
The screenshot shows a page header with the Waukesha County logo and the text 'Department/Office of XXXXXXXX Strategic Plan'. Below the header is a red bar with the text 'Pillar: Choose an item.' and two buttons: 'return to Objectives list' and 'return to Table of Contents'. The main content area displays 'Objective 1: Click or tap here to enter text.' followed by 'Owner: Click or tap here to enter text.' and 'Performance Measure: Click or tap here to enter text.'. Below this 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, or elsewhere!

Reader’s Guide Continued

[Return to Table of Contents](#)



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.

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.”

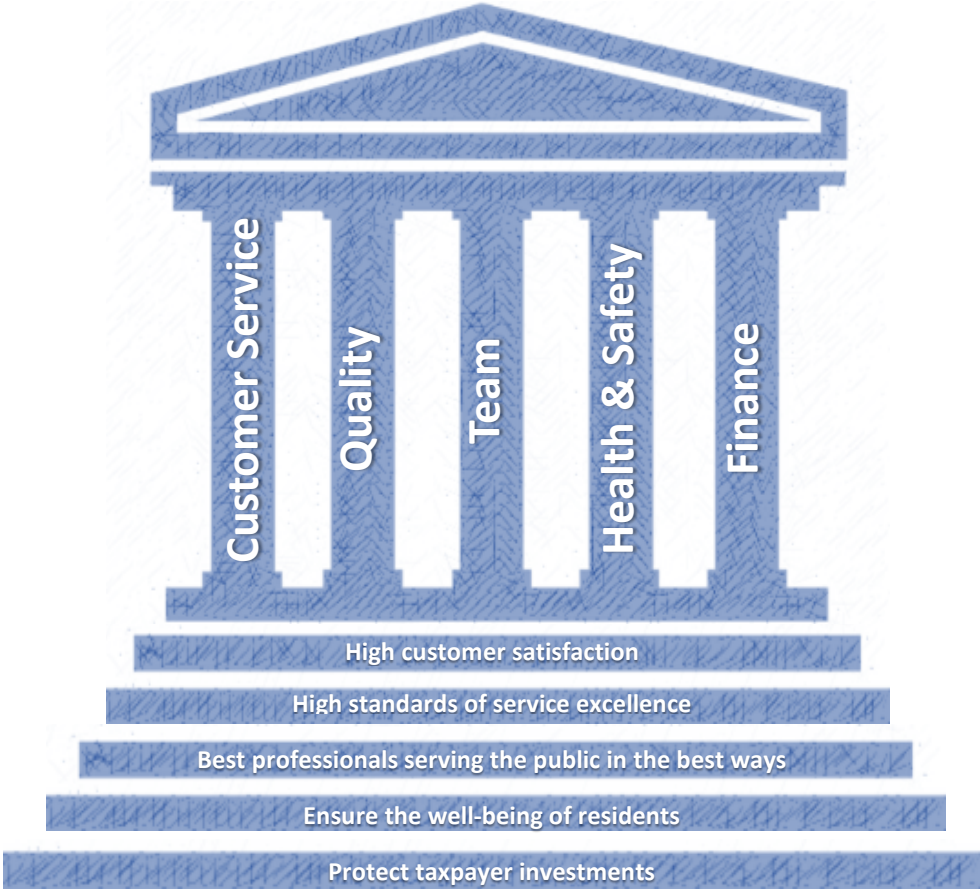
County Standards of Service Excellence

- 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 Waukesha County Clerk is a Wisconsin State Constitutional Officer whose department and staff is dedicated to ensuring the accurate, transparent, and lawful administration of core county functions that support representative governance and effective public service, including election administration, legislative support, administrative services, and serving as Clerk to the Waukesha County Board of Supervisors.

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](#) Customer Service
- [Objective 2](#) Team
- [Objective 3](#) Finance

County Pillar: Customer Service

 [Return to Strategic Objectives](#)

Objective 1:

Deliver consistently high-quality, equitable customer service across all County Clerk operations by systematically measuring customer experience through survey tools, strengthening staff capability through ongoing customer-service education, and continuously improving processes based on data, feedback, and service standards.

Owner: County Clerk

Performance Measure: Tracking survey responses and utilizing Workday and employee goals for employee training.

Strategy	Strategy Details	Owner	Timeframe
Measure customer satisfaction	Increase responses to the Waukesha County Customer Service Survey by 50% each year	County Clerk	2026-2028
Set and achieve customer satisfaction goal	Meet a 4.65 out of 5 for our overall customer service interactions	County Clerk	Ongoing
Strengthen customer service skills	Ensure 100% of customer-facing County Clerk staff complete at least six hours of customer service and communication training.	Deputy County Clerk	Ongoing

County Pillar: Team

 [Return to Strategic Objectives](#)

Objective 2:

Develop, finalize, and implement a comprehensive Standard Operating Procedure (SOP) Manual for the Waukesha County Clerk’s Office that standardizes core office functions, includes a structured onboarding program for new Waukesha County municipal clerks, and establishes clear protocols for ongoing communication to ensure consistent, accurate, and timely service delivery.

Owner: Deputy County Clerk

Performance Measure: Manual completed and approved; onboarding package deployed; communication plan scheduled and launched.

Strategy	Strategy Details	Owner	Timeframe
Departmental SOP’s	Develop, standardize, and publish a complete set of office-wide written procedures for core Clerk operations—including step-by-step procedures, workflow checklists, required forms/templates, reference materials, and escalation/issue-resolution steps—covering 100% of identified processes.	Deputy County Clerk	December 2027
Outgoing Communications	Establish and implement an office-wide communications framework that defines a standard cadence for routine updates, maintained distribution lists, and written standards distinguishing urgent vs. routine communications. Successfully launch the framework.	County Clerk	2026-2028
Municipal Clerk Onboarding	Ensure that 100% of newly appointed Waukesha County municipal clerks receive a standardized onboarding package and initial orientation within 10 business days of the County Clerk’s Office receiving notification of the appointment. Onboarding will be documented in a tracking log, with a monthly compliance report showing on-time completion and any exceptions.	Deputy County Clerk	Ongoing

County Pillar: Finance

 [Return to Strategic Objectives](#)

Objective 3:

Implement a balanced fiscal sustainability program that reduces controllable operating costs while increasing net departmental revenues, achieving measurable annual savings and new revenue through process improvement, procurement optimization, and expanded cost-recovery/service-based fees-while maintaining statutory compliance, and service levels.

Owner: Deputy County Clerk

Performance Measure: Reduce controllable operating costs by 2% and increase departmental revenues by 5% compared to the FY2026 baseline.

Strategy	Strategy Details	Owner	Timeframe
Election cost sharing with municipalities	Review election billing for under-collection, allowable cost recovery, billing accuracy, and timeliness. Explore sharing cost of ballot printing with municipalities concurrent with purchase of new election equipment	Deputy County Clerk	2026-2028
Cost saving initiatives	Implement a credit card payment convenience fee policy to recover payment processing costs, pursue cooperative bulk purchasing opportunities with municipalities and/or other counties to obtain better pricing, and strengthen inventory controls to minimize waste by avoiding overordering printed materials that may become obsolete.	Deputy County Clerk	2027
Increase departmental revenues	Streamline and standardize office workflows to increase daily appointment capacity, reduce turnaround time, and improve customer service without compromising accuracy, compliance, or service quality.	Deputy County Clerk	2027

Appendix A: Environmental Scan

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Environmental Scan Overview (Update with 2026-2028 Data)

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: 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.

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

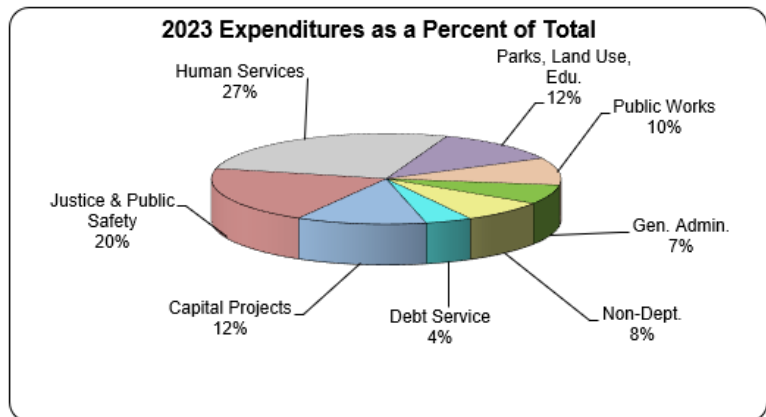
- There are approximately 160,600 households in Waukesha County. The number is expected to increase about 3% every 5 years. The average persons per household is approximately 3.
- The county is relatively affluent with a median household income of \$92,359, which is above both the state (\$64,901) and 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

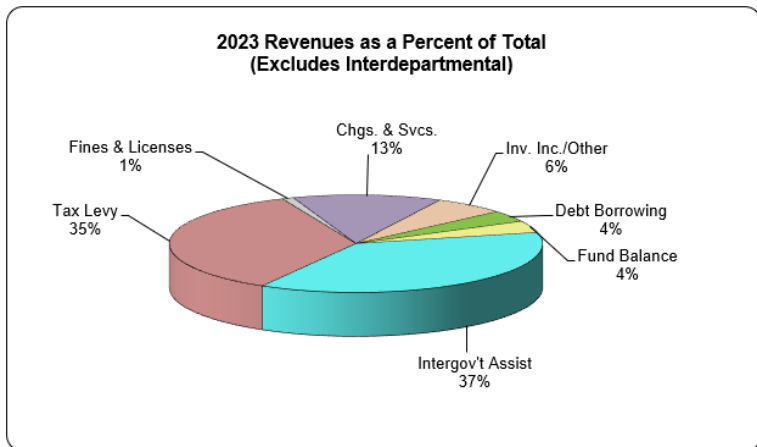


personnel costs consistently make up about half of total operating budget. The two largest functional areas, Justice & Public Safety and Health & Human Services, consistently comprise about 55%-56% of the operating budget (excluding capital and debt). Debt service costs are expected to increase in future 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.

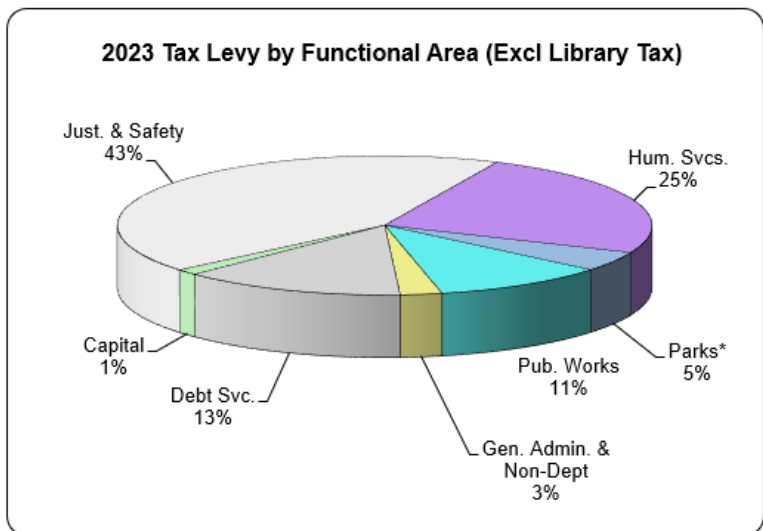
Waukesha County Budget: Revenues

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
Overall	4.63	4.73	4.55	4.52	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>
-------------	-------------	-------------------

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%
-----	-----	-----

Information and knowledge is shared openly within my department

64%	81%	+17%
-----	-----	------

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

73%	91%	+18%
-----	-----	------

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

61%	89%	+28%
-----	-----	------

I met with my direct supervisor or manager for a 1-on-1 rounding session*

83%	86%	+3%
-----	-----	-----

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](#).

SOURCES (Update with 2026-2028 links)

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

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