

# Waukesha County



## Department of Administration Strategic Plan 2015 - 2017

## **Waukesha County Mission Statement:**

“The mission of 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.”

<b><u>County Core Values</u></b>	<b><u>County Strategic Outcomes</u></b>
<ul style="list-style-type: none"><li><input type="checkbox"/> Collaboration</li><li><input type="checkbox"/> Ethics and Integrity</li><li><input type="checkbox"/> Innovation</li><li><input type="checkbox"/> Efficiency</li><li><input type="checkbox"/> Communication</li><li><input type="checkbox"/> Diversity</li><li><input type="checkbox"/> Seeking Cost Savings</li><li><input type="checkbox"/> High-Quality Customer Service</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> A safe county</li><li><input type="checkbox"/> An economically vibrant county</li><li><input type="checkbox"/> An environmentally responsible county</li><li><input type="checkbox"/> A well-planned county</li><li><input type="checkbox"/> A county that assists at-risk citizens</li><li><input type="checkbox"/> A county that provides customer with quality programs and Services</li><li><input type="checkbox"/> A county the provides cost-effective services delivered with competence and skill</li></ul>

## **Department of Administration Statement of Purpose**

The Department of Administration assists other County departments by providing County-wide standards and support systems to promote enhancements and efficiencies of services to the public.

## **Department of Administration Critical Issues**

### **Critical Issue One:**

The need to provide support service to our customers, through a critical evaluation of existing processes and the subsequent redesign and refinement of Department of Administration internal policies, procedures and practices.

### **Critical Issue Two:**

The need to proactively assess, plan, and respond to internal and external factors, which affect the County, in order to avoid fiscal adversity and operation disruption.

### **Critical Issue Three:**

The need to provide, develop, and maintain a quality workforce that enables County government to deliver effective and efficient services.

### **Critical Issue Four:**

The need to identify, evaluate, prioritize, and implement cost-effective technological advances that promote operations and support efficiencies while remaining congruent with County strategic objectives.

### **Critical Issue Five:**

Provide leadership in inter/intra-governmental cooperation to effect consolidation, collaboration and efficiency of public service.

## **Environmental Scan 2015-2017 - Summary**

During the Spring of 2015, Department of Administration (DOA) managers conducted divisional environmental scanning sessions with their teams to identify strengths, weaknesses, opportunities and threats (SWOT) facing the County as a whole and the critical issues facing DOA.

A variety of internal and external resources were utilized during these working sessions such as legislative analysis, employee survey, literature review and peer best practices. Most importantly, the environmental scan was built through manger led SWOT analysis conducted at the divisional level.

These analyses were reviewed and refined at multiple manger meetings focused on strategic planning and used to develop the departmental critical issues, goals and actions finalized in this plan. What follows is a summary of the analysis used to inform and guide the development of the 2015 – 2017 Strategic Plan.

### **Community Profile**

The expected growth of the County is key to understanding the future needs and expectations of residents. Approximately 393,000 people reside in Waukesha County. Waukesha County's population is projected to increase slightly more than 3% every 5 years, and is expected to reach 447,000 in the year 2025. The number of households is expected to rise at a slightly faster rate of 3.6%, resulting in an average of 2.4 members per household.

As the County population increases to 447,000, the expected percentage of residents age 65 and older will rise from 14% to 26% of the population by 2025. The greatest percentage growth is expected in the over age 80 group, followed next by 55-64 age group. From an employment standpoint, the County will need to look at succession planning as many County employees are reaching retirement age. The baby boom phenomenon impacts all employers and as the pool of applicants in the 25-44 age group shrinks, there will be more competition with employers for skilled workers to fill leadership positions.

As the workforce ages, health care needs will increase. This, in turn, places additional strain on the ability to provide health benefits in a cost effective manner. The County has adopted service delivery enhancements and benefit plan adjustments. However, health insurance trends suggest costs will continue to rise faster than the rate of inflation which will require the County to continue adopting efficiency and quality of service measures to manage costs.

The tax base is expanding and continues to recover from the 2008 recession. Residential tax base makes up over 70% of the total value, but commercial, manufacturing and personal property are increasing and all values increased 3.8% in 2014.

The unemployment rate in Waukesha County is below state and national rates. It is expected that employment will continue at or above current rates and experience significant growth in the Business Services, Health Care and Social Services areas. Household income continues to increase and is greater than State of Wisconsin and national averages. In 2010, Waukesha County had the highest median household income of any county in the state at \$72,982.

### **Community Expectations**

In 2013, Waukesha County conducted focus groups soliciting feedback from County residents, business leaders and non-profit organizations on issues facing county government. The future envisioned through this process is one in which County government:

- Provides high quality services at the lowest possible costs.
- Pursues cooperative efforts to enhance delivery of services.
- Maintains environmental resources and cultural and recreational opportunities.
- Manages growth in a way that maintains a high quality of life.
- Supports a healthy economy that attracts new businesses and allows existing businesses to grow.

Citizens demand more government accountability and value for tax dollars spent. The public expects efficient core services and increased efficiency through collaboration with other entities and jurisdictions.

The need for county services continues to expand due to growth, the impacts of the 2008 recession and slow economic recovery. Additionally, the Post September 11<sup>th</sup> mindset, coupled with data security concerns, requires an emphasis both on physical and digital security and investments in buildings, backup systems and contingency planning.

High Federal deficits are forcing states to fund a greater proportion of traditionally Federal government domestic services and programs. The deep recession of 2008, slow recovery and tight State budgets continue to strain the fiscal relationship between the state and counties. This is acutely felt in the areas of Health and Human Services and Circuit Court Services where intergovernmental revenues do not keep pace with service requirements. At the local level the goal is to hold the line on property taxes, and on the impact to local taxpayer, which requires the County to do more with less or be faced with charging user fees or reducing the quality/level of services provided.

## **REGULATORY AND LEGISLATIVE ISSUES**

State and Federal legislation and court decisions will continue to impact DOA divisions. Workplace policies and procedures must be updated on a regular basis to remain current with changes in legislation or interpretations. Federal legislation and regulations in areas such as privacy under the Health Insurance Portability and Accountability Act (HIPAA) and Family Medical Leave Act (FMLA) are examples of areas where policies and procedures must be monitored and remain compliant with change.

Federal legislation specifically in the areas of health care, have and will continue to, significantly impact the County and DOA. Ensuring that County health plans are in compliance with the Affordable Care Act and that the County is in a position to meet future regulations and compliance obligations is critical. Failure to properly comply will result in significant fiscal penalties. Compliance creates a need to develop and maintain a high level of technical expertise through staff and outside resources or a combination of both.

Federal/State budget deficits put more strain on local services, and as previously stated, drive consolidation. Successful projects such as trunked radio, shared dispatch, law records, materials recycling, collection services and multi-county medical examiner services demonstrate the advantage of shared services in which governments can inter-governmentally cooperate to maintain services and reduce costs. However, the execution of these projects takes significant technical, project management and leadership expertise. The drive towards consolidation and efficiency also impacts administrative functions and resources may have to be prioritized to achieve the highest return on investment.

Technology in areas such as hosted computer systems and online payments require in-house expertise in the development and deployment of cloud based systems. Compliance and security will require more extensive audit procedures and internal control documentation relating to rule compliance. The demands for technical and accounting expertise, combined with the desire for more citizen engagement, are significant and are among the many competing priorities for financial staff.

## **TECHNOLOGY ISSUES AND TRENDS**

The use of technology within County government and its customers continues to grow. Trends toward the cloud, web-based, e-commerce and end user driven systems makes more functionality and service available to internal and external customers. This “always on – always accessible” culture means increased dependence on information systems and the support services to implement/manage systems and mitigate risk are critical.

Continued investment in technology will fuel productivity. Enhancements to information management, security, business continuity and data availability will continue to develop. The increased use and availability of data means that data security is an every greater responsibility and the need to protect data and follow sound information governance policy is critical.

The reality of continuous technological change requires increased employee training and experience requirements. A significant portion of traditional information technology duties/responsibilities are being shifted to end users driving the need to spend a greater portion of time on training, planning and testing software changes. 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 project development and management processes to ensure successful implementations. Technology projects will require a cost/benefit analysis to address the impact of maintaining and managing technology and its impact on staff in comparison to existing systems or other technological alternatives to ensure solid investment and positive return on investment

### **WORKFORCE ISSUES AND TRENDS**

As previously stated, the County will need to look at succession planning as many County employees are reaching retirement age. This is especially true for DOA, where the employee average age is 50 and almost 20% of the workforce has more than 25 years of County service. With 41% of DOA employees over the age of 55 it is expected that a large group of experienced employees, senior professionals and managerial staff, will be retiring in the next 3 to 5 years.

The need for transition planning, policy and procedure documentation and cross training were consistently identified in all divisional SWOT analyses and point toward a county-wide need to develop recruitment/skill development and compensation programs that attract, develop and retain employees adaptable to lean/continuous improvement. Smaller staff will be distressingly vulnerable to the loss of even a single staff 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 will need to be more conservative than in the past.

Throughout the County, departments are asking employees to work harder and implement new programs and services usually with less staff. Departments and citizens want more information and the digital expectation is that information is always available. DOA staff is also significantly impacted with implementing new county-wide systems. The implementation and testing of new systems requires employee commitments that are frequently in addition to their core work responsibilities. These expectations place greater stress on employees and points toward a need to manage workloads effectively. In addition the need to have workplace policies which address and support our emphasis on diversity, inclusion and respect are essential. The need to have programs which support employees’ efforts and impacts on themselves personally is critical.

Employee development is essential, and the County will need to continue incentives and incorporate the building of personal expertise through the performance evaluation process providing opportunities for individual growth and training. Established programs such as Management University, Introduction to Supervision and Lean Management, develop skills and prepare employees for promotional opportunities. There will be a need to continue and expand these types of programs to prepare workers for management roles and to support all personnel in accepting broader responsibilities.

As part of the strategic planning process employees participated in a survey measuring their awareness of the process and their contributions toward organizational and personal success. DOA participation was at 79%, and results were positive indicating that employees are both aware of the process and feel that they are able to be recognized and rewarded for their contributions. Over 72% of DOA employees strongly or somewhat agree that their work directly contributes toward the overall success of the County. This percentage reflects a good starting point and the goal is to continue to improve employee awareness and engagement to improve the quality of services provided by the County.

### **Department Critical Issues**

With the completion and analysis of the findings from the environmental scan, the Department has identified the critical issues used to shape the Department goals and action plans included in this Strategic Plan.

## Strategic Outcome – Goal Worksheet

**Strategic Outcome: A county that provides cost-effective services delivered with competence and skill.**

- 1. Goal: With the introduction of the new front page to the County Website, which incorporates new features, drill downs, and Topic page links, engage all interested departments in the development of the content for these Topic Pages. Provide citizens, vendors, and other interested parties, with easy to access and current information that will streamline the interaction with the County electronically, following the theme, Always Open / Always Available.**

**Goal Owner: Information Technology**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Form focus groups to identify appropriate Topic Pages.	Information Technology, County Executive Staff, Departmental Representatives	Phase 1 Complete
2. Design content for the Topic Pages and provide training to departments to maintain pages.	Focus Groups, Departmental Representatives	3 <sup>rd</sup> Qtr 2015 - Ongoing
3. Integrate department content to engage citizens and improve online experiences through education/outreach, social media engagement ecommerce and data accessibility.	Information Technology, County Executive Staff, Departmental Representatives	3 <sup>rd</sup> Qtr 2015 - Ongoing
3. Test concepts with public / vendor evaluation.	County Executive staff, IT	3 <sup>rd</sup> Qtr 2015 - Ongoing
4. Refine based on feedback.	County Executive staff, IT	4 <sup>th</sup> Qtr 2015 - Ongoing
5. Publish Initial Topic Pages – Review Content.	IT Departmental Representatives	4 <sup>th</sup> Qtr 2015 - Ongoing

**Evidence of Success (KOI, Target Indicator):**

Measure user hits to the topic pages.

Conduct user poll to random group of visitors to the Topic Page.

Publish Survey results, adjust if required.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A county that provides customers with quality programs and services.**

- 2. Goal: Supporting the County Clerk and working with Purchasing, implement a new Countywide Election System that will effectively and efficiently amass all voter selections and transmit the results electronically to municipal clerks as well as to the County Clerk, where all results will be posted to the County web site, for citizen viewing.**

**Goal Owner: Information Technology**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Issue the RFP for selection of a new Countywide Election System.	Purchasing, County Clerk, IT	Complete
2. Work with the municipalities and Purchasing to evaluate the responses and award contract to selected vendor.	Purchasing, County Clerk, Municipal Clerks, IT	Complete 1 <sup>st</sup> Qtr. 2015
3. Complete a full test of the selected system prior to equipment installation at the municipalities.	County Clerk, Municipal Clerks, IT	3 <sup>rd</sup> Qtr 2015
4. Distribute all new voting equipment to the municipalities and test the system for connectivity and accuracy.	County Clerk, Municipal Clerks, IT	3 <sup>rd</sup> Qtr 2015
5. Complete a full County election simulation to evaluate the functionality of the selected solution.	County Clerk, Municipal Clerks, IT	4 <sup>th</sup> Qtr 2015
6. Review all interfaces with the Accountability Board to insure compliance with all elections standards.	County Clerk, IT	4 <sup>th</sup> Qtr 2015
7. Target the April 2016 election cycle for live production evaluation.	County Clerk, IT, Municipal Clerks	1 <sup>st</sup> Qtr 2016
8. Evaluate results and adjust accordingly.	County Clerk, IT	2 <sup>nd</sup> Qtr 2016

**Evidence of Success (KOI, Target Indicator):**

Successful Election with new system in the April 2016 Election.

System is fully functional, verified by the Government Accountability Board, and ready for the 2016 Presidential Election.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A county that provides cost-effective services delivered with competence and skill.**

- 3. Goal: Working with Departments, DOA-Purchasing and Budget divisions, vendors, and other local government entities, explore opportunities for moving functions off of County servers onto Cloud Service environments where the transference of the function shows a definite Return on Investment and limits the risk for the County.**

**Goal Owner: Information Technology**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Define list of potential Cloud (Private, Public, Hybrid) solutions to be evaluated.	IT, Purchasing	Ongoing
2. Refine list to determine best opportunity for success for movement to the Cloud (Private, Public, Hybrid).	IT	Ongoing
3. Contact Waukesha County municipal leaders and IT organizations to determine interest in joint efforts to structure mutually beneficial Cloud (Private, Public, Hybrid) opportunities.	County Executive Staff, DOA, IT	2 <sup>nd</sup> Qtr 2015
4. Contact neighboring counties (their leaders and IT organizations) to determine interest in joint efforts to structure mutually beneficial Cloud (Private, Public, Hybrid) opportunities.	County Executive Staff, DOA, IT	4 <sup>th</sup> Qtr 2015
5. Based on the success of step 3 and 4, and the results of step 2, develop ROI calculations that will identify the best targets for Cloud endeavors for the County and partners.	IT, Municipalities, and neighboring counties	4 <sup>th</sup> Qtr, 2015
6. Develop the RFP for Cloud computing for Waukesha County and partners.	IT, Partner IT, Purchasing, Corp Counsel, Cty Exec staff, DOA	4 <sup>th</sup> Qtr 2015
7. Select Vendor for Cloud computing.	IT, Partner IT, Purchasing, DOA	2 <sup>nd</sup> Qtr 2016
8. Implement Cloud computing solution.	IT, Partner IT, Purchasing, DOA	3 <sup>rd</sup> Qtr 2016
9. Evaluate solution, if successful, identify next opportunity.	IT, Partner IT, Purchasing, DOA	3 <sup>rd</sup> Qtr 2016, Ongoing

**Evidence of Success (KOI, Target Indicator):**

Return on Investment is clearly defined and target areas are selected.

Return on Investment is achieved.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A County that provides cost effective services delivered with competence and skill.**

**4. Goal: Diversity: Develop a workplace culture and climate that is respectful, inclusive and collaborative.**

**Goal Owner: Human Resources Manager**

Action Steps To Complete This Goal:	Individuals Involved	Target Date To Complete:
1. Review and update the County Equal Employment Opportunity and Inclusion plan on an annual basis.	Human Resources	3 <sup>rd</sup> Qtr. 2015, Annually
2. Prepare an annual statistical analysis of the County workforce compared to the Waukesha County labor force and other relevant labor markets.	Human Resources	3 <sup>rd</sup> Qtr. 2015, Annually
3. Conduct regular assessments and audit of current employment policies, practices, and procedures in order to identify and correct potential barriers.	Human Resources	3 <sup>rd</sup> Qtr. 2015, Annually
4. Provide annual training to managers and supervisors on diversity and inclusion.	Human Resources	3 <sup>rd</sup> Qtr. 2015, Annually
5. Develop general employee communications, policies and training on the principles of diversity and inclusion, such as Respect in the Workplace.	Human Resources	4 <sup>th</sup> Qtr. 2015
6. Establish relationships with community leaders and organizations which reflect the overall diverse population of Waukesha County and the relevant labor markets.	Human Resources	4 <sup>th</sup> Qtr. 2015, Continuously

**Evidence of Success (KOI, Target Indicator):**

The number of employees trained increases annually.

The percentage of the County's minority workforce in relation to the relevant labor market increases on an annual basis.

The County creates collaborative working relationships with a wide variety of community organizations

## Strategic Outcome - Objective Worksheet

**Strategic Outcome: A County that provides customers with quality programs and services.**

**5. Goal: Benefits: Establish a comprehensive benefit system that improves the overall health and well being of employees and their dependents using cost effective and quality resources.**

**Goal Owner: Human Resources**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Establish an on-site shared clinic with the City of Waukesha and the Waukesha School District in order to reduce healthcare costs.	Human Resources, City of Waukesha, Waukesha School District	Complete
2. Conduct a complete analysis of the impacts of the Affordable Care Act and develop and implement a plan to comply with the regulatory, reporting and compliance obligations under the law.	Human Resources	4 <sup>th</sup> Qtr. 2015 Ongoing
3. Enhance the health advancement / wellness program in conjunction with the services available with the on-site medical clinic in order to provide employees with an integrated and comprehensive wellness program and service.	Human Resources, Wellness Committee, Healthstat	4 <sup>th</sup> Qtr. 2015 Ongoing
4. Collaborate with the City of Waukesha and Waukesha School District on joint Wellness initiatives.	Human Resources, City of Waukesha, Waukesha School District	4 <sup>th</sup> Qtr. 2015 Ongoing
5. Implement the employee wellness portal / website to provide employees access to wellness challenges, education, nutrition and exercise trackers and links to other health resources.	Human Resources	4 <sup>th</sup> Qtr 2015
6. Conduct an annual Health Risk Assessment program and develop Health Advancement programming based on aggregate results.	Human Resources	4 <sup>th</sup> Qtr. 2015 Ongoing
7. Analyze health plan utilization data, aggregate claims information, and alternative programs to determine appropriate modifications to plan design wellness initiatives, and employee communications.	Human Resources	4 <sup>th</sup> Qtr. 2015 Ongoing

**Evidence of Success (KOI, Target Indicator):**

Performance metrics contained within the Healthstat contract are met annually.

The rate of health insurance plan increases is below the medical rate of inflation.

The participation in wellness and education programs increase annually.

**Strategic Outcome – Goal Worksheet**

**Strategic Outcome: A County that provides customers with quality programs and services.**

**6. Goal: Compensation: Establish and maintain a comprehensive classification and total compensation system that is both externally competitive and internally equitable which enables the County to recruit, retain, and reward a qualified, competent and skilled workforce.**

**Goal Owner: Human Resources**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Conduct an annual assessment of the impact of the Pay for Performance system	Human Resources	4 <sup>th</sup> Qtr. 2015 Annually
2. Develop a plan to expand and transition classifications from the step range system to the open pay for performance system	Human Resources	4 <sup>th</sup> Qtr. 2015 Ongoing
3. Evaluate the step system and make recommendations for incorporating pay for performance concepts for those positions remaining in the step system.	Human Resources	4 <sup>th</sup> Qtr. 2015
4. Develop a total compensation communication strategy and plan for educating employees and elected officials on the components and value of their overall salary and benefits.	Human Resources	4 <sup>th</sup> Qtr. 2016
5. Conduct a market analysis on key benchmark and hard to fill positions in order to ensure the system remains aligned with the County total compensation philosophy.	Human Resources	4 <sup>th</sup> Qtr. 2017
6. Assist departments in the development and redefinition of key competencies, skills, and performance criteria to be used in the performance evaluation process and pay for performance system.	Human Resources, Department Heads/Managers	4 <sup>th</sup> Qtr. 2015 Annually
7. Develop and implement a plan to conduct regular classification reviews of their job content to ensure internal equity across the County.	Human Resources	4 <sup>th</sup> Qtr. 2016

**Evidence of Success (KOI, Target Indicator):**

The number of classifications moved from the Step to Open System.

Track turnover, specifically situations where employees reported leaving for higher compensation.

Through the performance evaluation audit process determine the extent that departments have clearly defined, competencies, skills and needed performance criteria.

## Strategic Outcome – Goal Worksheet

**Strategic Outcome: A County that provides cost effective services delivered with competence and skill.**

**7. Goal: Workforce Development: Increase the excellence (effectiveness and efficiency) of the County employee workforce in order to sustain our position as a public sector leader.**

**Goal Owner: Human Resources**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Develop both a short term and long range training development plan which will include the delivery of training resources from both within and outside the County.	Human Resources	4 <sup>th</sup> Qtr. 2016
2. Evaluate the current training and development programs and develop recommendations for modification, elimination, and consolidation consistent with the assessment and planning objectives.	Human Resources	3 <sup>rd</sup> Qtr. 2016
3. Evaluate the training library resources and provide funding for the replacement and enhancement of the materials.	Human Resources	2 <sup>nd</sup> Qtr 2016
4. Research, identify, and implement alternative forms of training delivery maximizing the use of technology through e-learning.	Human Resources	4 <sup>th</sup> Qtr. 2017
5. Evaluate the Mentorship pilot programs and make modifications as needed. Finalize the program and communicate and roll out the initiative.	Human Resources	4 <sup>th</sup> Qtr. 2015, Annually
6. In conjunction with the HRIS system replacement, establish an employee training database resource to enable departments and Human Resources to track employee training and development	Human Resources	4 <sup>th</sup> Qtr. 2017
7. Conduct an annual audit of the employee performance evaluations with a focus on the relationship of employee goals and objectives to the defined expectations and standards, County core values, and department strategic and operational plans.	Human Resources	3 <sup>rd</sup> Qtr. 2015, Annually

8. In collaboration with County managers and employees, conduct a training and development assessment to identify employee development opportunities within the different segments of the County workforce.	Dept, Heads, Dept Managers, Human Resources	3 <sup>rd</sup> Qtr. 2016
9. In collaboration with County managers and employees, conduct a training and development assessment to identify employee development opportunities within the different segments of the County workforce.	Dept, Heads, Dept Managers, Human Resources	3 <sup>rd</sup> Qtr. 2016
10. Develop, coordinate and administer a Countywide Continuous Improvement Program based on LEAN principles	Human Resources	4 <sup>th</sup> Qtr. 2015

**Evidence of Success (KOI, Target Indicator):**

The number of employees successfully utilizing training and workforce development programs.

The number of employees engaged in lean management processes and the savings/efficiency measures as documented in these processes.

## Strategic Outcome – Goal Worksheet

**Strategic Outcome: A County that provides cost effective services delivered with competence and skill.**

**8. Goal: Workforce Development: Develop a comprehensive plan to increase the supply of qualified candidates to meet the County's workforce needs.**

**Goal Owner: Human Resources Manager**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Conduct an analysis of the applicant pool for select positions to determine the effectiveness of recruitment sources	Human Resources	4 <sup>th</sup> Qtr. 2016
2. Assess the recruitment strategies and practices to determine alternative methods to source candidates including the utilization of social media, and the collaboration with departments to capitalize on their existing business resources and strategies.	Human Resources	4 <sup>th</sup> Qtr. 2016
3. Conduct an analysis and develop a long range forecast of department positions and job families impacted by retirement and high turnover. Assist departments in the transition planning process associated with the forecast.	Human Resources	2 <sup>nd</sup> Qtr. 2016 Annually

**Evidence of Success (KOI, Target Indicator):**

Create new recruitment strategies and alternative methods which result in the establishment of a qualified applicant pool.

Departments have analysis and plans to address gaps in their workforce due retirements and high turnover.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: Cost effective services delivered with competence and skill.**

**9. Goal: In conjunction with the implementation of Administrative Support recommendations and ongoing strategic efforts to improve employee skills; evaluate staffing needs within administrative and financial support classification in the Business Services, Records Management and Accounting areas to better serve internal and external customer needs and provide continued paths for employee development.**

**Goal Owner: Accounting and Business Services**

<b>Action Steps To Complete This Objective:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Prepare an inventory of support tasks.	Accounting and Business Services	2 <sup>nd</sup> Qtr 2015
2. Develop plan for future staffing.	Accounting and Business Services	2 <sup>nd</sup> Qtr 2015
3. Develop a training plan and associated documentation.	Accounting and Business Services	3 <sup>rd</sup> Qtr 2015
3. Review application access assignments.	Accounting and Business Services	Ongoing
4. Assignment of primary and secondary responsibilities.	Accounting and Business Services	3 <sup>rd</sup> Qtr 2015
5. Submit staffing plan for DOA/HR review.	Accounting and Business Services	3 <sup>rd</sup> Qtr 2015
6. Submit final plan for DOA Director review and approval.	Accounting and Business Services	3 <sup>rd</sup> Qtr 2015

**Evidence of Success (KOI, Target Indicator):**

Improved coverage and performance of essential support tasks.

Increased skills applied to performance of duties as measured in performance reviews.

Improved job satisfaction.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: Cost effective services delivered with competence and skill.**

**10. Goal: Develop strategies for an updated cost allocation strategy for the End User Technology Fund (EUTF) with a continued focus on efficiency and improved end-user decision making.**

**Goal Owner: Accounting and Information Technology**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Incorporate Communications Fund into EUTF structure.	Accounting and IT	4 <sup>th</sup> Qtr 2015
2. Develop response to Internal Audit report.	Accounting and IT	4 <sup>th</sup> Qtr 2015
3. Provide updated allocation strategy recommendation for DOA approval.	Accounting and IT	December 2016
4. Draft updated policy document.	Accounting and IT	April 2016
5. Incorporate strategy into 2017 budget process.	Accounting and IT	June 2016

**Evidence of Success (KOI, Target Indicator):**

Develop 2017 and later budgets with revised cost allocation strategy.

Improved end-user understanding of EUTF cost allocation methodology strategy and how end-user decisions impact costs.

With IT support, provide end-users with the tools to maintain stable EUTF contributions and evaluate opportunities to reduce costs with strategic investments such as cloud computing and standardization of line of business applications.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: Cost effective services delivered with competence and skill.**

**11. Goal: Develop a comprehensive countywide library of finance-related policy, procedure and training documentation incorporating new system acquisitions.**

**Goal Owner: Accounting, Business Services and Budget**

<b>Action Steps To Complete This Objective:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Develop an outline of all needed policy procedure areas.	Accounting, Budget and Business Services	2 <sup>rd</sup> Qtr. 2015
2. Assign drafters and due dates for each of the above.	Accounting, Budget and Business Services	2 <sup>rd</sup> Qtr. 2015
3. Prepare policy and procedure documents/forms/updates and post to intranet.	Accounting, Budget and Business Services	3 <sup>rd</sup> Qtr. 2015 – 4 <sup>th</sup> Qtr. 2016 Ongoing
4. Review and document processes and training tools, with specific emphasis on the standardizing the knowledge base and implementing best practice features/ongoing enhancements of FMIS budget module.	Accounting, Budget and Business Services	4 <sup>th</sup> Qtr. 2015 Ongoing
5. Prepare training modules as needed.	Accounting, Budget and Business Services	2 <sup>nd</sup> Qtr 2015 – 4 <sup>th</sup> Qtr 2016/Ongoing
6. Complete documentation and post to intranet.	Accounting, Budget and Business Services	1 <sup>st</sup> Qtr 2015 – 4 <sup>th</sup> Qtr 2016/Ongoing
7. Survey end users pre and post projects to measure success and evaluate areas in need of continued emphasis.	Accounting, Budget and Business Services	1 <sup>st</sup> Qtr 2015 – 4 <sup>th</sup> Qtr 2016/Ongoing

**Evidence of Success (KOI, Target Indicator):**

Increased understanding of policy and procedures as measured by end-user survey.

Improved end-user self-service/reduction in requests.

Improved access forms and procedures.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: Cost effective services delivered with competence and skill.**

**12. Goal: Implement new County time and attendance (T&A) system improving efficiency and data collection.**

**Establish an integrated Human Resource Information System (HRIS) which enables managers, and employees access to information and provides greater human resource and payroll system efficiencies.**

**Goal Owner: Accounting Services, Human Resources and Information Technology**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Complete T&A system implementation and staff training -Health and Human Services.	Accounting, HR and IT	June 2015
2. Conduct an analysis of the current system to determine functionality limitations and potential return on investment of a new system.	Accounting, HR and IT	2 <sup>nd</sup> Qtr. 2016
3. Develop a capital project proposal for the County capital budget.	Accounting, HR and IT	2 <sup>nd</sup> Qtr. 2016
4. Develop high level project plan which includes identifying broad system requirements, financial resources, administration and department staffing impacts, outside consulting and project management resources.	Accounting, HR and IT	4 <sup>th</sup> Qtr. 2016
5. Collaborate with Purchasing, Accounting Services, and Information Technology staff on the selection, contracting and implementation of a new system.	Accounting, HR and IT	3 <sup>rd</sup> Qtr. 2017
6. Develop a communication strategy and plan to ensure department staff are informed and available during testing and implementation.	Accounting, HR and IT	4 <sup>th</sup> Qtr. 2017

**Evidence of Success (KOl, Target Indicator):**

Upgraded Time and Attendance and Human Resources Information System data collection and management capability.

**Strategic Outcome - Goal Worksheet**

**Strategic Outcome: A County that provides cost-effective services delivered with competence and skill.**

**13. Goal: Provide fiscal and implementation support in identified Department efforts in inter/intra-governmental cooperation to effect efficiency of public services.**

**Goal Owner: Budget Manager**

<b>Action Steps To Complete This Objective:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Monitor successful implementation in new initiatives: Shelter Care Initiative with HHS, MRF project; on-site Health Clinic implementation, Radio Services, Medical Examiner multi-County services.	Budget Staff, And HHS Department	2016-2017
2. Assist with EUTF cost allocation, move to the cloud.	Budget and Accounting	2016 Budget
3. Assist with potential new partners for Communication Center	Budget	2016 Budget
4. Assist with Federated Library consolidation with Jefferson County	Budget	2016 Budget

**Evidence of Success (KOI, Target Indicator):**

Number of Department Program Initiatives Implemented.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A well planned County.**

**14. Goal: Support data driven decision tools and enhance insight and analysis of report data.**

**Goal Owner: Budget Manager**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Enhance Department skills and use of budget module upgrade and master file used in budget preparation and monitoring including current year estimating.	Budget, Dept Staff	2016
2. Conduct internal customer survey tool to baseline skill level and direct future training and communication.	Budget, Dept Staff	2 <sup>nd</sup> Qtr. 2015
3. Develop Performance Based Management (PBM) models with historical and future projections to identify fiscal risks and opportunities.	Budget, Dept Staff	2016 Budget
4. Promote dash board reporting (i.e., real time financial and performance data analysis).	Budget, Dept. Staff	2015-2017
5. Identify and implement more data automation to streamline access/use in files and reports.	Budget, Accounting and Dept. Staff	4 <sup>th</sup> Qtr. 2016

**Evidence of Success (KOI, Target Indicator):**

Increase number of Department managers who use financial management tools who rate their skill level as advanced.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A County that provides customers with quality programs and services.**

**15. Goal: Examine Countywide delinquent accounts receivable processes to improve collections efficiency, improve interdepartmental communications and update existing procedures using LEAN techniques.**

**Goal Owner: Business Services and Collections**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Evaluate and improve HHS referral processes, through a six sigma project.	Business Services, Collections, HHS-Fiscal Services	Complete
2. Review and update referral, write-off and refund policies. Communicate policy to the departments and municipal partners through outreach training sessions.	Business Services, Collections	1 <sup>st</sup> Qtr. 2016, ongoing
3. Evaluate the opportunity to transition collector systems using common platform for server virtualization or reduced costs through operating system changes or vendor cloud solutions.	Business Services, Collections, IT	2 <sup>nd</sup> Qtr. 2016, ongoing
4. Continue development of collector and collection support staff cross training to provide for more even distribution of accounts and consistency in response times.	Business Services, Collections	4 <sup>th</sup> Qtr. 2016, ongoing
5. Develop 3 year business plan.	Business Services, Collections	4 <sup>th</sup> Qtr. 2016
6. Use Collections and Business Services Lean and Green Belt training to assist business partners' receivables management (HHS, Clerk of Courts, municipalities)	Business Services, Collections and client partners	4 <sup>th</sup> Qtr. 2016

**Evidence of Success (KOI, Target Indicator):**

Decrease age of account at referral.

Number of outreach session conducted annually.

Improved collection efficiency ratio.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: Cost effective services delivered with competence and skill.**

**16. Goal: Assess current Countywide Cashiering application and business environment and evaluate intra-governmental opportunities to improve receipting, cashiering and online services functions.**

**Goal Owner: Business Services**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Upgrade current Active Cashiering system and install as requested by departments.	Business Services, IT and All County Departments	3 <sup>rd</sup> Qtr 2015
2. Amend capital project and conduct Business Process reviews to identify gaps and opportunities for improved functionality. Evaluate these future opportunities with departments in preparation for system(s) replacement.	Business Services, IT and All County Departments	3 <sup>rd</sup> Qtr 2015
3. Assist in the preparation of a Parks and Land Use request for proposal to replace Parks Reservation, Registration and Golf systems and integrate vendor solution with Countywide Cashiering and/or Financial System.	Business Services, IT	2 <sup>nd</sup> Qtr 2015
4. Continue development of online payment services with local communities for property tax collection/other services and internal departments for online payments.	Business Services, IT and All County Departments	Ongoing
5. Convene workgroup to revise Cash Handling Policy and Cashiering security standards. Publish policy on intranet/train.	Business Services	2 <sup>nd</sup> Qtr 2015

**Evidence of Success (KOI, Target Indicator):**

Improved efficiency of collection as measured by decreased cost per transaction.

Decreased merchant card fees.

Improved customer satisfaction.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: Cost effective services delivered with competence and skill.**

**17. Goal: Continued development of Enterprise Content Management (ECM) solutions and training initiatives to improve information management/record keeping functions through reduction in risk and improved efficiency.**

**Goal Owner: Business Services**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Conversion of existing Stellent ECM systems to SharePoint 2010.	Business Services, IT and All County Departments.	Complete
2. Convene ECM Core Group to evaluate and establish ECM Policy and convene ECM Governance Committee on quarterly basis to approve policy for orderly and secure ECM development.	Business Services, IT and All County Departments.	Initial policies established by 4 <sup>th</sup> Qtr 2016, ongoing
3. Conduct records retention audits and ECM development and compliance requirements with departments.	Business Services, IT and All County Departments.	Audits complete by 4 <sup>th</sup> Qtr 2016, Ongoing
4. Develop policy and training program for e-mail management. Implement ECM solution to allow end users to manage e-mails to their business needs and record keeping requirements.	Business Services, IT and All County Departments.	4 <sup>th</sup> Qtr 2015, ongoing
5. Implement ECM solutions, such as workflow and decentralized document management.	Business Services, Collections	Ongoing
6. Review use and storage of budget documentation within the FMIS system for ECM opportunities to implement, i.e., appendices, capital projects.	Budget Division	Ongoing

**Evidence of Success (KOI, Target Indicator):**

Decreased paper storage costs.

Improved access to documentation.

Improved customer satisfaction.

Decreased risk and improved capabilities in meeting compliance requirements.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A County that provides cost-effective services delivered with competence and skill.**

**18. Goal: To develop and implement a Surplus Property Management Plan, in cooperation with Dept. of Public Works and DOA-IT, that will utilize web-based technologies to expedite the re-purposing or sale/disposal of County surplus property in a cost effective manner that optimizes revenues.**

**Goal Owner: Purchasing**

<b>Action Steps To Complete This Objective:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Research how other governmental entities manage surplus property.	Purchasing	Completed
2. Explore auction services vendors and options. Test sale of disposal items on various auction sites as appropriate.	Purchasing	Completed
3. Work with DPW-Fac Mgmt and IT on property movement/storage plans and use of web-based technologies and County's website to facilitate efficient surplus property management.	Purchasing, DPW-Fac Mgmt; IT	2 <sup>nd</sup> Qtr. 2015
4. Draft policy that addresses re-purposing, sale, donation, recycling & trash of surplus property as well as incorporates Dept. trash-to-treasure days' items.	Purchasing, DPW-Fac Mgmt	2 <sup>nd</sup> Qtr. 2015
5. Update Disposal of Obsolete/Surplus County Property Ordinance.	Purchasing, County Board	3 <sup>rd</sup> Qtr. 2015
6. Implement new process and policy.	Purchasing, DPW-Fac Mgmt, IT	4 <sup>th</sup> Qtr. 2015
7. Monitor effectiveness and make adjustments as appropriate.	Purchasing, DPW-Fac Mgmt, IT	1 <sup>st</sup> Qtr. 2016

**Evidence of Success (KOI, Target Indicator):**

Reduce waste and decrease cost through repurposing useful equipment.

Improve inventory control and coordination of surplus property (i.e., improved "findability").

Reduction in storage space requirements.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A well planned County.**

**19. Goal: To develop and implement a Contract Management Training Program for County Department staff involved in awarding contracts through Purchasing's Bid/RFP process, so as to better prepare them for their responsibilities related to the procurement and on-going contract administration of their purchased services in an effort to improve the efficiency and effectiveness of the contract administration process including performance monitoring and payment management.**

**Goal Owner: Purchasing**

<b>Action Steps To Complete This Objective:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Conduct roundtables with key Department stakeholders to clarify the level of their understanding of the contract management process and to identify issues of concern that have arisen on past contracts that can be addressed in this training program.	Purchasing Staff and Key Dept. Stakeholders	2 <sup>nd</sup> Qtr 2015
2. Draft outline of training program.	Purchasing	3 <sup>rd</sup> Qtr 2015
3. Meet with select Department stakeholder(s) to review draft training program to get their feedback/input prior to finalizing the program.	Purchasing Staff and Key Dept. Stakeholder(s)	3 <sup>rd</sup> Qtr 2015
4. Finalize program.	Purchasing	4 <sup>th</sup> Qtr 2015
5. Schedule training sessions with appropriate stakeholders.	Purchasing; Key Dept. Stakeholders	4 <sup>th</sup> Qtr 2015
6. Implement training, obtain feedback post-training, modify as appropriate.	Purchasing; Key Dept. Stakeholders	1 <sup>st</sup> & 2 <sup>nd</sup> Qtr 2016

**Evidence of Success (KOI, Target Indicator):**

Improved contract implementation as evidenced by reduced disputes and improved compliance.

Lower contract implementation costs through improved compliance and monitoring.

Increased employee satisfaction as measured through increased job knowledge.

## Strategic Outcome - Goal Worksheet

**Strategic Outcome: A safe County.**

**20. Goal: To develop and implement a 5 Year Risk Management Loss Control Inspection Plan, in cooperation with Dept. of Public Works and Parks & Land Use, that will prioritize County facilities and operations to inspect over a five year period for the purpose of identifying potential safety hazards and means to eliminate or reduce such hazards in a cost effective manner, in an effort to protect the County's human, financial, and property assets from the adverse impact of loss.**

**Goal Owner: Risk Management**

<b>Action Steps To Complete This Goal:</b>	<b>Individuals Involved</b>	<b>Target Date To Complete:</b>
1. Outline purpose of objective and share with DPW and P&LU (key stakeholders) to get their agreement to participate in this process.	Risk Management, DPW, P&LU	2 <sup>nd</sup> Qtr. 2015
2. Develop a 5 year plan: a) identify all County facilities & operations b) identify factors to be used to prioritize which facilities/operations to inspect and how often to inspect them c) apply the chosen factors to each facility/operations to come up with 5 year plan.	Risk Management	2 <sup>nd</sup> Qtr. 2015
3. Share plan with all County Departments so they understand purpose of inspections, timeline, and their role in the process.	Risk Management	3 <sup>rd</sup> Qtr. 2015
4. Develop a) form letter templates to be used when coordinating inspections/follow-up with Department management and b) in-house inspection forms to be used when conducting the inspections.	Risk Management	3 <sup>rd</sup> Qtr. 2015
5. Develop and issue an RFP to engage services of a loss control vendor to assist Risk Management in conducting some of the loss control inspections.	Risk Management, Purchasing	4 <sup>th</sup> Qtr. 2015
6. Begin inspections	Risk Management, Stakeholder Depts.	1 <sup>st</sup> Qtr. 2016

**Evidence of Success (KOI, Target Indicator):**

Maintain Workers' Compensation Modification Factor < 1.0.

Number of safety hazards identified, mitigated or eliminated.

Reduced frequency and severity of workers' compensation claims per year (# of claims and total \$ incurred).

**Evidence of Success (KOI, Target Indicator):**

Through the annual employee survey, ensure that a minimum of 80% of Department staff understands how their work and assigned goals directly contribute to the overall success of the County in meeting its key strategic priorities.

**Evidence of Success (KOI, Target Indicator):**

At least one shared objective with another County Department.

A written communication plan and strategy to communicate important information to employees.

Through the annual employee survey, ensure that a minimum of 80% of Department staff have answered the following statement affirmatively: "I agree that information and knowledge are shared openly within my department."

**Evidence of Success (KOI, Target Indicator):**

Through the annual employee survey, ensure that a minimum of 80% of Department staff have answered the following statement affirmatively: "During my annual performance evaluation with my direct supervisor, I discussed my training needs and opportunities for professional development."

**Evidence of Success (KOI, Target Indicator):**

Through the annual employee survey, ensure that a minimum of 80% of Department staff understand the County Core Values.

Through the annual employee survey, ensure that a minimum of 80% of Department staff have answered the following statement affirmatively: "I agree that I can be recognized for extra effort while demonstrating the County Core Values."