

Succession/Workforce Planning Presentation

Committee on Finance and Personnel

Assessor's Office

September 2019

Strategic & Operational Considerations

External factors expected to impact service delivery and recruitment/retention in the next 3 years.

Wisconsin Trends

- 1) Wisconsin assessment offices are not keeping up with industry technology standards
- 2) In Wisconsin, most municipalities have shifted to contract assessors instead of municipal employees – limits the pool of qualified appraisers
- 3) Inadequate funding of local governments negatively impacts recruitment and all aspects of operations

Strategic & Operational Considerations

Assessment Industry Trends

- 1) Lack of funding has caused the assessment industry to rely more on data and technology than ever before
- 2) Owners of high value properties are hiring tax attorney's to represent their interests – causes high level of claims against the city

Staffing Trends

- 1) The greying of the assessment and appraisal professions
- 2) Lack of new people entering the profession
- 3) Need to redefine positions in order to make compensation consistent with the required skills

Strategic & Operational Considerations

Technology

Most Wisconsin Assessors offices have not implemented industry standard technology

- causes workers to look elsewhere in order to find more engaging work
- reduces our ability to hire the best and brightest
- increases operating costs because higher staff levels are required

Strategic & Operational Considerations

Strategies already implemented by department to address external factors impacting service delivery and recruitment/retention.

- 1) Connecting with vendors to find technology based solutions that will enable us to lessen future operating costs and improve service
- 2) Creating new positions in order to match expenditures with required skills and to lower costs
- 3) Reaching out to new groups in order to share information about current openings
- 4) Management's focus on management philosophy of Servant Leadership

Areas for Development

- Positions with the most significant turnover in the past 5 years and strategies used to mitigate the impact.
 - 1) **Property Appraisers** – because of retirements
 - 2) **Office Assistant III** – because of retirements
 - 3) **Division Managers** – because of retirements

Areas for Development

Improvement Areas

For the last five years, the focus of the Assessor's Office has worked to improve these areas:

- 1) Training
- 2) Consistency from the management team
- 3) Greater use of up-to-date technology
- 4) Improve diversity within the office
- 5) Create pathways for college interns to become full time employees
- 6) Finding new ways to eliminate municipal silos in order to reduce operating costs

Areas for Development

Strategies used to develop and retain employees:

- 1) Listened to concerns of staff and developed a new focus for the office
- 2) Being flexible about how we get our work done has enabled us to save money, improve our operation and create new opportunities for current employees
- 3) For appraisers - Pay progression plan / and most recently - new job descriptions have been created – jointly developed
- 4) Improved communication through regular team meetings

Areas for Development

Strategies used to develop and retain employees

- 5) Creating training opportunities
- 6) Listened to employees concerns about Safety and then created Safety Committee that continually addresses concerns
- 7) Implemented new position of Assessment Operation Director – to focus on consistency by all Division Managers and appraisers
- 8) Have tried various methods of getting the work of combinations / divisions completed. Being flexible we have found the best method after several attempts.

Areas for Development

1) Property Appraisers

Implemented pay progression plan & continued to redefine job duties

Reduced workloads

Recruiting through external organizations and schools

Future: Using property technicians – as feeder positions for appraiser

2) Office Assistant IIIs

Hiring from the OAIII list with good results

3) Division Managers

Internal promotions

Consistency between managers

Established new methods of documenting workflows and for sharing documentation creating efficiencies and ensuring consistency

Succession Planning

Current Status - multi prong approach:

Connect with schools and outside organizations

Ensure staff are trained and promotable

Created methods of cross training of all staff members

Created mentor / mentee opportunities

Recruitment Challenges

Top titles and recruitment concerns:

- 1) Commissioner, Chief Assessor and Assessment Operations Director are eligible to retire
- 2) Division Managers – 2 of 3 are eligible to retire
- 3) Property Appraisers – on the whole, the appraisal staff is relatively inexperienced however 6 of 26 appraisers are eligible to retire – if these 6 retire, we will have a staff with very limited experience – this causes concerns for valuing complex and high value properties
- 4) Lack of workers entering the field

Recruitment Challenges

Methods of recruitment

- 1) Reaching out to various external organizations with a focus on diverse groups so we can develop new pathways for future employees
- 2) Working closer with DER to implement new approaches
- 3) Participation in African American Leadership Alliance – Milwaukee (AALAM) has opened up many avenues of finding new employees
- 4) Working with individual AALAM members and other groups to broaden awareness and discover new recruitment opportunities

Action Plan

Goals

1. Create clearly defined career paths
2. Work with DER to improve pathways for interns to become full time employees
3. Work with DER to improve pathways for technicians to become appraisers
4. Develop management readiness program for staff members who are interested in becoming supervisors
5. Make staff more aware of external training opportunities
6. Revitalize Job shadowing program

Action Plan

Timeline

1. Currently working with DER to create new job descriptions for appraisers by 1/1/2020
2. Create plans by March 31, 2020 and then refine plans after staff members have begun implementing the plan.
3. Roles and responsibilities: top management team to be responsible

Jobs with Purpose; Life with Balance

- In the last few years, the Assessor's office has been able to show marked improvement in diversity. Current statistics include 48% women, 11% Hispanic, 26% African American.
- Top management's focus on Servant Leadership has improved morale and created opportunities for advancement and opportunities for sharing of ideas thereby improving the office operation.

9 Qualities of the Servant Leader

1. Values diverse opinions
2. Cultivates a culture of trust
3. Develops other leaders
4. Helps people with life issues
5. Encourages
6. Sells instead of tells
7. Thinks you, not me
8. Thinks long-term
9. Acts with humility