

JUNE 2020 UPDATE

Strategic Plan



Palm Beach County
Property Appraiser

Prepared by Stacey Haynes, Human Resources Director
Approved by Tim Wilmath, Chief Appraiser

Executive Summary

In May of 2018, the Property Appraiser recognized the critical need for developing a strategic plan, that had never been created in the history of the Office. With a forecast of retirements and losing institutional knowledge, it was time to tap into management expertise and create a roadmap for the future. The plan determined the direction for the Office over the next five years and has guided the Office in achieving its goals to date. In addition to the major achievements accomplished since implementing the plan, every decision made on a daily basis considers the vision, mission, and core values of the Office so together the team's vision will become a reality.

This document explains the process for developing the plan, outlines key actions taken and results, illustrates budget allocation for goals, and explains the ongoing communication plan that is critical to its success.

Leadership

Dorothy Jacks was elected as Palm Beach County's Property Appraiser in 2016 after a distinguished 28-year career in the Office. As a Certified Florida Appraiser and Assessment Administration Specialist, she has the highest professional designation in Florida and one of the highest international designations for someone who holds the office of Property Appraiser. Her expertise has earned Jacks regional, national and worldwide recognition as a leader in her field. She served as president of the International Association of Assessing Officers (IAAO), an 8,000-member worldwide organization of professional assessing and appraising officials in 2018. She also served as past president of the Florida Chapter of IAAO.



Our Business

The Palm Beach County Property Appraiser's Office employs 240 qualified employees, has five service centers located throughout the County, and is one of the top jurisdictions in the United States to retain the most credentialed appraisal experts. The majority of the staff hold professional certifications that include Certified Florida Evaluators, Residential Evaluation Specialists, Cadastral Mapping Specialists, Assessment Administration Specialists, Personal Property Specialists and Certified Residential and General Appraisers.

The Office has three primary responsibilities:

- Determine the taxable value of more than 640,000 parcels and nearly 60,000 tangible personal property accounts in Palm Beach County.
- Apply tax exemptions to properties that meet certain qualifications.
- Maintain the county's official map of property owners

Under Property Appraiser Dorothy Jacks' leadership, key initiatives implemented include broadening the efficiency of the office using new and innovative technology, enhancing community outreach, and increasing exceptional customer service.

Our Vision

A world where state-of-the-art valuation and excellence in customer service come together.

Our Mission

We value property, administer exemptions, and maintain ownership records for Palm Beach County fairly, equitably and in accordance with Florida law.

Our Core Values

- We are a team of qualified professionals.
- We are dedicated to providing quality service.
- We are responsible and accountable.
- We are committed to accuracy.
- We operate with fairness and integrity.

Strategic Analysis

SWOT Results May 2018

With the many changes that had taken place since the Property Appraiser was elected in 2016 and with several retirements on the horizon, it was important that the leaders of the Office who know the history and were knowledgeable in the industry, set the direction for the future.

A two-day strategic planning retreat was facilitated with the management team. The team completed an environmental scan, used an impact grid to determine priorities, and worked diligently building consensus on the future direction of the Office.

As a result, they created their mission, vision, and core values as described on the previous page. But in order to get there, they needed to complete a SWOT analysis first, identifying **Strengths**, **Weaknesses**, **Opportunities**, and **Threats**.

Strengths and weaknesses are internal variables that either contribute to the team's success or have a negative impact on the team. Opportunities and threats are external events or actions that the team can use to its advantage to increase potential or they may hinder the team in its ability to achieve a goal.

During a SWOT analysis, often one team member may see a strength as a weakness while another may see a weakness as a strength. The same holds true for opportunities and threats. For example, multiple retirements may be seen as a strength with new staff joining the team, while another team member might see the retirements as a loss of history and knowledge and list it as a weakness.

Strengths

- Background and expertise of staff
- Knowledgeable staff
- Manager tenure
- Longevity of staff
- Good/great leadership
- Live person answers the phone; good customer service
- Professionalism
- Open to change
- Stability
- Technology
- Communication (top-down; monthly meetings; dept-wide meetings)
- Staff development
- Transparency
- Team effort (manager can call another manager)



SWOT Results continued...

Weaknesses

- Lack of cross training between departments (specifically Exemption and Appraisal)
- Too much customer service; employees may overstep to please customer
- Silo management where departments work independently of each other
- Employees asking for too much information that may not be necessary
- No end goal defined or action steps to get there
- Lack of documented policies and procedures
- Longevity of staff
- Excessive socialization
- No phone scripts available
- Lack of technology
- Lack of sharing processes efficiencies
- Resistance to change
- IAS world (poor technology)
- Lack of communication
- Too much change too fast
- Lack of follow through on ideas
- Lack of extensive formal training (receive 'bare bones')
- Lack of a FAQ for each department on the intranet

Opportunities

- New and innovative technology
- Education
- Cross training
- Being creative in using office space effectively
- Communication improvement
- Social media
- Empowerment
- New administration (fresh start)
- Promotional opportunities
- Succession planning
- Mentoring

Threats

- Retirements
- Politics/Legislature changes
- Electronic devices in the workplace
- Downtime of servers
- Vulnerability of electronic everything (hacking, virus, etc.)
- Not accepting new challenges
- Failure to depend on staff in favor of AVMS
- Changing economy
- Jobs becoming more complex
- Distractions (open office environment)
- Hoarding of knowledge (lack of empowerment, shared efficiencies)
- Generational communication needs



Action Plans to Date

May 2018 - June 2020 Accomplishments

- **Standard Operating**

Procedures: Create, communicate, and monitor SOPs for key job functions within each department

1. Provided agency-wide training in SOP writing
2. Developed a standardized template for SOP writing
3. Selected platform for publishing SOPs
4. Identified critical SOPs to schedule priority development
5. Added SOP writing to individual performance goals
6. Required monthly reporting on department SOP status

- **Technology Enhancements:**

Leverage technology to improve work processes and streamline cycle time for critical services provided to the public

- **100% Paperless:** Become a paperless office through effective electronic workflow

1. Redesigned the Property Appraiser Public Access (PAPA) website with enhanced features for navigation and customized filtered searches
2. Streamlined processes of online filing for homestead exemption and portability applications
3. Developed an online tool for mailing address change requests for real property and tangible personal property
4. Significantly condensed the Value Adjustment Board petition hearing schedule
5. Shortened the amount of time to show recent sale transactions on the PAPA website from 6 weeks to 1-3 weeks
6. Incorporated new technology using computer software, data analytics, and mobile platforms to assist with the valuation processes
7. Restructured office space within various departments to improve the lines of communication and remove barriers to productivity

Note: For obvious reasons, these two goals overlap in their completed actions

Action Plans to Date

May 2018 - June 2020 Accomplishments

- Customer Service:** Enhance customer service by defining service standards, training staff, and educating the public.
 - Instituted the office’s digital communications program, including social media channels and multimedia productions.
 - Defined service standards to ensure delivery consistency throughout all offices
 - Developed an Office-wide customer service manual
 - Identified guidelines for speaking engagements and presentations
 - Created and implemented a communication plan to promote overall visibility of the Office services

- Strategic Staff Development:** Empower and develop staff by providing opportunities for knowledge sharing, cross training, and creation of succession plans
 - Developed cross training teams in each section for critical job functions
 - Created succession plans for targeted positions, including internal high potentials
 - Re-wrote job descriptions to more accurately reflect current and future job functions and requirements
 - Identified career plans and training/certification needs for promotions

ACTION PLAN WORKSHEET			
Goal	Strategic Staff Development: Empower and develop staff by providing opportunities through knowledge sharing, cross training, and succession planning.		
Timeframe	2 Years: October 1, 2018 – December 30, 2020		
Team	Stacey Haynes, Pat Poston, Jake Waver, Pam Lamb, Keith Alexander and Steve Weissman		
Resources	All Management Staff and Human Resources		
Objectives	Objective	Responsible Person	Timeframe
	1. Create succession plans for key positions that will be vacated due to promotion or retirement.	Pat Poston Jake Waver	2 Years
	2. Create training opportunities for cross-department knowledge sharing.	Pam Lamb Steve Weissman	2 Years
	3. Re-write job descriptions to more accurately reflect current job functions and requirements.	Stacey Haynes Keith Alexander	1 Year

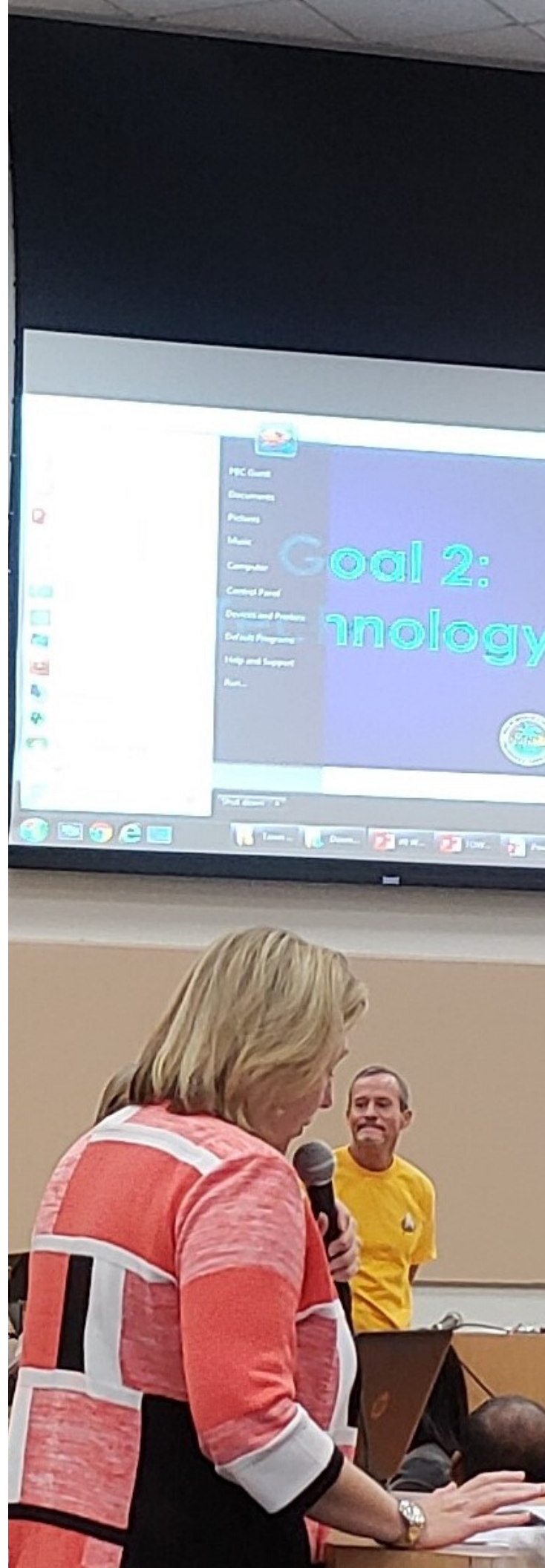
Budget Highlights

Allocations for Achievements

As with most improvements and major goals, funding is often a critical component. Although the FY2018 had already been allocated when the strategic plan was developed, budgets were modified to meet the needs of the five primary goals. The good news is that much of the work needed to be done would be achieved by the talented staff already employed by the Office and internal resources previously encumbered.

Additional funding or reallocation of funds were needed to support the following:

- \$381,520 - New technology for valuation process
- \$39,200 - 100% paperless drive
- \$12,570 - External and internal communication plan implementation
- \$9,300 - Training and development for SOP writing for all key internal staff
- \$5,700 - Strategic staff development programs
- \$2,110 - Customer service initiative



Communication Plan

Multiple Communication Strategies Implemented since 2018

Creation of Organization Slogan

As a result of the strategic planning session, the slogan, *We Value What You Value*, was adopted. All internal and external publications and communications were updated to reflect this message.

We Value What You Value Video

A four minute self-instructed recording was produced to explain the strategic planning process results and visually present the plans for the Property Appraiser's Office future.

What We Value Publication

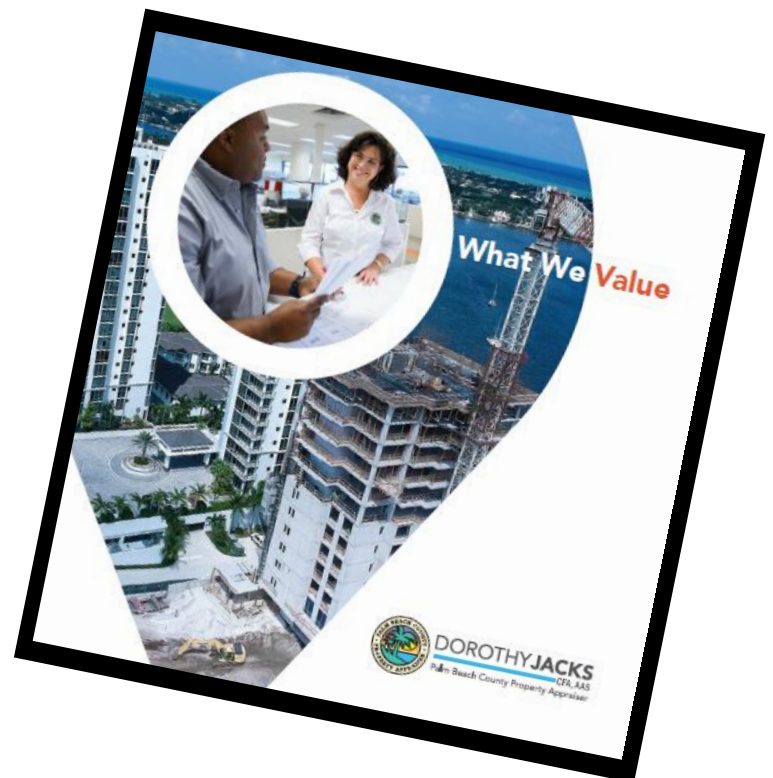
This is an in depth report that provides statistical data and summary information about the operations of the Office. It is used for community speaking engagements and outreach programs. This publication lives on the website: <https://www.pbcgov.org/papa/news/2020/2020-01-06-value.htm>

Showcase Highlights

Videos loop regularly on Office lobby monitors displaying updates and progress of strategic goals.

Town Hall Meeting

A few months after the strategic plan had be solidified, the management team introduced the plan to the entire Office team. The interactive presentation included a leadership introduction stressing the value of the plan, small group presentations for each goal, and video recordings showing application in daily operations.



Communication Strategies continued

Multiple Communication Strategies Implemented since 2018

Social Media Channels

Weekly and monthly posts are generated highlighting the Office's core values and goals through day-to-day operations.

Conference Rooms

All meeting rooms display a strategic plan poster and a vision board that includes the mission, vision, and core values. These visual representations throughout the Office are friendly reminders to stay focused and make daily decisions that support the plan moving forward.

Employee Buy In

Each employee was provided a convenient strategic plan summary card to keep posted at their desk sites. Most employees have included the Office slogan on all email signature lines.

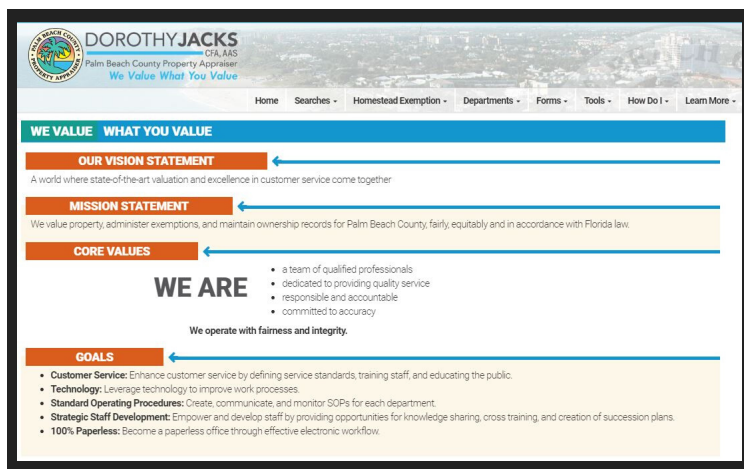
In addition, upon implementation of the plan employees were assigned a goal responsibility that was integrated into their own performance appraisal.

Service Center Lobbies

When visiting any one of the service locations, the public will see strategic plan posters. Where available, monitors display the strategic plan on full screens with continuous video updates.

PAPA

The Property Appraiser Public Access (PAPA) website proudly posts its mission, vision, core values, and strategic goals on the agency's home page. It is easily available for the public to view. The *We Value What You Value* video is also posted on this same webpage.



Our Focus



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