WALTON COUNTY

TAX COLLECTOR

Deliver the highest quality of service with people who CARE.

Walton County Tax Collector's Office
Rhonda Skipper, Tax Collector
571 U.S. Highway 90 East
DeFuniak Springs, FL 32433

2014 Governor's Sterling Award Application

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Site Listing and Descriptors Form

A. Address of Site	B. Relative Size – Percent of Applicant's		C. Description of Products, Services, or Programs
	Employees	Sales or Operating Budget	
(Main Office) Walton County Tax Collector 571 US Hwy 90 E. DeFuniak Springs, FL 32435	24 employees 75%	80% Sales/ Revenue	See Figure P.1-1 : Service Offerings & Sources of Revenue page i Organizational Profile
(Branch Office) Walton County Tax Collector Santa Rosa Beach Courthouse Annex 31 Coastal Center Blvd. Ste. 700 Santa Rosa Beach, FL 32459	8 employees 25%	20% Sales/ Revenue	See Figure P.1-1: Service Offerings & Sources of Revenue page i Organizational Profile

WALTON COUNTY TAX COLLECTOR

Organization Chart

Tax Collector — Rhonda Skipper

Chief Deputy Tax Collector — Cory Godwin

- **Director of Finance** — Nathan Thomas
  - **Finance Assistant** — Nathanial Bush

- **Director of Administration** — Kara Stallings
  - **Talent Manager** — Debra Wooten
    - Clerk II — Charlene Stanley
    - Clerk II — Debby Stroud
    - Clerk II — Becky Nall
  - **Customer Relations Supervisor** — Vivian Clark

- **Director of Operations** — Lisa Henderson
  - **Compliance Services Supervisor** — Patty Reihl
    - **Assistant Supervisor** — Janea Burgess
      - Clerk II — Robin Braddam
      - Clerk II — Kaye Hutchinson
  - **Collections Services Manager** — Tammy Day
    - **Assistant Supervisor NW** — Sammy Fannin
    - **DL Administrator NW** — James Hallford
      - Clerk II — Ashleigh Simmons
      - Clerk II — Sheila Carter
      - Clerk I — Katherine Grimm
      - Clerk I — Jessica Laird
      - Clerk I — Damian Tatro
      - Clerk I — Troy Dupree
    - **SW Branch Supervisor** — Traci McVay
    - **Assistant Supervisor** — Katina Laird
    - **DL Administrator SW** — Brian McBroom
      - Clerk I — Kerry Mixon
      - Clerk I — Jonathan Rhodes
      - Clerk I — Toma Rushing
      - Clerk I — Erica Beck
      - Clerk I — Nikki McCormick

Index of Application Figures and Results

Glossary

ACH – Automated Clearing House; a department that handles electronic transfers of money for a businesses

All Hands Retreat – Annual mandatory off-site meeting to educate all employees about key topics to organizational success

ASTD – American Society for Training and Development

AXIS Data Solutions, Inc. – provides full range of data processing, print and mail services

Balanced Score Card – BSC - Incorporates the performance measures, goals, and action plans of the KSFs. The BSC is also electronically displayed, deployed, and communicated through MyStrategicPlan.com.

BCC – Board of County Commissioners

CBA – Cost Benefit Analysis

CFC – Certified Florida Collector – Tax Collector certification issued through DOR

CFCA – Certified Florida Collector's Assistant – Certification program administered through DOR for Tax Collector staff

CPM – Certified Public Manager

CSI – Collector Solutions, Inc.; Business company that processes, manages, and reconciles e-check and credit card transactions.

DBPA – DeFuniak Business Professional Association

DHSMV – Department of Highway Safety & Motor Vehicles

DL – Driver License

DMS – Department of Motorist Services

Docuware – Document imaging and storage software

DOR – Department of Revenue

DSS – Decision Support System

E-blast – Emailed newsletter sent to customers based on their interest by transaction or service type

EFS – Electronic Filing System

Employee of the Quarter/Year – Peer Nominated Award for Employees who are recognized as demonstrating outstanding service and performance

Environmental Scan – Annual assessment conducted during the SPP. This two part analysis is conducted to assess both internal and external factors for success such as business and operations strategic challenges and advantages, key human resource challenges and advantages and sustainability trends. Research is conducted on market and industry trends, benchmarks, technology, legislative and regulatory changes, and economic and financial trends. Findings are incorporated into the strategic plan.

Ethics and conflict of interest – Employees are required to acknowledge, read, and sign a statement as they understand policies contained in the Employee handbook

Exempt – salaried employees; see also Non-exempt

Facebook – Online social networking service

FFWCC – Florida Fish & Wildlife Conservation Commission

FDLIS – Florida Driver License Information System DHSMV's database containing Florida driver license transactions

FHP – Florida Highway Patrol

FMLA – Family Medical Leave Act

FRVIS- Florida Real Time Vehicle Information System. Contains DHSMVs database for Florida motor vehicle transaction

FS – Florida Statute

FTCA – Florida Tax Collectors Association – The association comprised of the 67 Tax Collectors in the state of Florida.

ICDP – Individual Career Development Plan - Encourages the employee to identify specific skills and competencies that are desired to be developed or improved

Key Success Factor – KSF – Our most important strategic objectives, performance measures, goals and

action plans which allow us to achieve our mission and vision are aligned to our key success factors.

Leadership Roadmap – a development resource used to assist team members in planning goals for future growth and success

Linkedin – A social networking website for organizations and people in professional occupations

Manatron – (Is now Thompson Reuters) Property tax and payment system

MSP – My Strategic Plan – web based strategic planning solution

MV – Motor Vehicle

MVV – Mission, Vision, Values

Non-Exempt – Hourly employees, see also Exempt

Onboarding – Sets the stage for employee understanding and their acceptance of their mission, vision, and values

Orientation – Comprehensive introduction to key work processes, expected behaviors, benefits, and SLT

PDCA – Plan Do Check Act – improvement process

PIP – Performance Improvement Plan

PIT – Process Improvement Team

PT – Property Tax

Q-flow – Automated line-queuing system used to call customers to the front counter to conduct transactions. Also used to measure wait and cycle times.

RATE – Remote Access Tax Express

RealAuction.com – Company that hosts the WCTC Online Tax Certificate Sale and Tax Deed Application System

Real ID Act – An act of Congress that modified U.S. federal law pertaining to security, authentication, and issuance procedures standards for the state driver's licenses and identification (ID) cards, as well as various immigration issues pertaining to terrorism.

ROI – Return on Investment

SHRM – Society for Human Resources Management

SLT – Senior Leadership Team consists of the Tax Collector, Chief Deputy, Director of Operations, Director of Administration, and Director of Finance

SP – Strategic Plan – an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy Answers the questions: "What do we do?" "For Whom do we do it?" and "How do we excel?".

SPP – Strategic Planning Process – Annual systematic planning process used to create the strategic plan by setting direction.

Sungard NaviLine – Accounting, payroll, and purchasing software

SWOT Analysis – Planning tool in which Strengths, Weaknesses, Opportunities, Threats affecting the WCTC are identified

Talent Manager – Commonly referred to by other agencies as HR manager. Is responsible for policy updates, employee engagement initiatives, and training/development needs with a focus on creating an environment of improvement and engagement.

TalentEvo – Talent Management Software Application

Tax Certificate – consists of the sum of delinquent real estate tax (unpaid amount), interest on the delinquent amount (1.5% for each of the months of April and May - and June if the auction is held in June), Tax Collector's commission (5% on the delinquent amount), and the newspaper's advertising charge (& sale costs or other costs). Tax certificates are a first lien against property

TDA - Tax Deed Application - Two years from the date of the delinquency (April 1) but no longer than 7 years, the tax certificate holder can request a tax deed application. This process starts the foreclosure of the property.

TC – Tax Collector – An independent constitutional officer as outlined in Article VIII of the Florida Constitution. There are sixty-four TCs in the State of Florida whose terms are 4 years.

Twitter – An online social networking and micro-blogging service.

VOIP - Phone system that uses internet protocol as a means of transporting calls.

WC – Walton County

WCTC – Walton County Tax Collector

Yammer – Organizational social media tool to share information across teams and organize projects so you can go further – faster.

Organizational Profile

P.1 Organizational Profile
P.1a Organizational Environment
The Walton County Tax Collector's Office (WCTC), located in the county seat of DeFuniak Springs, is one of 67 Tax Collector offices in the state of Florida. In Florida, the elected position of county Tax Collector (TC) is a constitutional officer outlined in Article VIII of the Florida Constitution. The Tax Collector is elected every 4 years in the presidential election year and serves as a local, independent agent providing various services on behalf of the Department of Revenue, Department of Highway Safety and Motor Vehicles, Florida Fish and Wildlife Conservation Commission, and various county and city authorities. Duly elected by the citizens of Walton County, The Honorable Rhonda Skipper has served as the Tax Collector since 2005. The WCTC serves approximately 57,783 residents located within a 1,066 square mile area encompassing several rural and municipal communities, including 26

miles of pristine beach front property along the Gulf of Mexico.

P.1 a(1) Product and Service Offerings
A day in the life of a Floridian or a visitor to our state means almost constant interaction with the programs, benefits, and institutions funded through a county Tax Collector's office. The services we provide include: (1) the collection of local property taxes and tangible personal property taxes; (2) the processing of title and registration transactions for motor vehicles, mobile homes, and vessels; (3) the issuance of driver licenses and state identification cards; (4) issuing hunting and fishing licenses; and (5) distribution of taxes and fees to the appropriate stakeholder agencies. These services are available in one of two strategically located branches, online, by mail, after hours drop box, our RATE program for mobile onsite tax payment, or by phone. **Service Offerings** are further described below and detailed in **Figure P.1-1.**

Figure P.1-1: Service Offerings & Sources of Revenue

				Delivery Mechanisms						
Service Offerings & Sources of Revenue										
Products, Services and/or **Sources of WCTC Revenue**	**Product/Service provided** **on behalf of…**	**% of Transactions** **2013**	**% of Total Revenue** **2013**	**In Person**	**Phone***	**Phone Pay**	**Web***	**Online Pay**	**Mail**	**Drop Box**
Property Taxes Collection and distribution of property and tangible personal property taxes	DOR and Local Taxing Authorities	46%	94.4%	●	●	●	●	●	●	●
Motor Vehicle Services Issuing, renewing and transferring of registrations and titles for vehicles, vessels and mobile homes	DHSMV	47%	5.1%	●	●		●	●	●	●
Driver License (Services began March 2012) Issuing and renewing drivers licenses and ID cards	DHSMV	6%	0.4%	●	●		●	●	●	●
Other (includes hunting & fishing licenses) Issuing licenses and permits to local hunters and fisherman, interest, and fees retained	FFWCC/other	1%	0.1%	●	●	●	●	●		

Information dissemination only.

P.1a(2) Vision and Mission
Tax Collector Honorable Rhonda Skipper has created a team based culture, driven by our senior leaders, that involves all employees in the decision making process. An annual review is conducted to re-validate our mission, vision, values, strategic priorities, and core competencies to ensure reinforcement and alignment using our web-

based strategic planning solution MyStrategicPlan.com (MSP). Through our Strategic Planning Process (SPP), our Vision, Mission, Values, and Strategic Priorities were revised in 2011 to ensure understanding and a clear view of the future among employees. Our strategic priorities closely align to our core competencies to ensure we are constantly leveraging our advantages. WCTC capitalizes

on the identified **core competencies** of 1) Customer Service; 2) Financial Accountability; 3) Information Sharing; and 4) Technological Innovation 5) Agility; through their alignment to: 1) strategic priorities/perspectives; 2) the work system; and 3) key work processes. For example, WCTC's core competency of Customer Service is aligned to our strategic priority of Customer Focused, which ensures a constant focus on leveraging this core competency. Key customer requirements (such as requirements for fast, professional service) are incorporated into work processes to go above and beyond statutory requirements and exceed customer expectations. Core competencies are evaluated annually during the SPP. Our **purpose, vision, mission, values**, strategic priorities/ perspectives, core competencies, and motto are outlined in **FigureP.1-2**.

Figure P.1-2: Vision, Mission, Values, Strategic Priorities, Core Competencies, and Motto

WCTC Organizational Culture
Purpose: To perform the state work of collecting and distributing taxes and fees at the local level.
Vision: A passionate, talented, and caring TEAM united in the relentless pursuit of excellence in our people, services, and community.
Mission: Deliver the highest quality of service with people who CARE.
Values: 1) Hire, retain, and celebrate talent 5) Relentlessly pursue improvement in ourselves and our work 2) Maintain humility despite success 6) Demonstrate care for each customer and their family 3) Be truthful in all conversations 7) Compromise a dynamic team of family who do work and life…together 4) Embrace challenges and change 8) Seek opportunities to serve others.
Strategic Priorities/Perspectives: **C.A.R.E** **C**ustomer Focused **A**ccountability & Accuracy **R**elentless Pursuit of Improvement **E**ngaged & Empowered Workforce
Core Competencies: 1) Customer Service; 2) Financial Management; 3) Information Sharing; 4) Technological Innovation 5) Agility
Motto: Commitment to Service

Figure P.1-3: Workforce Profile

WCTC Workforce Profile						
Employees	32					
Workforce Segments	Associates: %	Technician: %	Professional: %	Leader: %		
	23.4	33.3	13.3	30.0		
Gender	Female: %	Male: %				
	75.0	25.0				
Age	20-30: %	31-40: %	41-50: %	51-60: %		
	25.0	28.0	28.0	19.0		
Workforce Diversity	White: %	Black: %	Hispanic: %			
	97.0	3.0	0			
Education	Master's: %	BA/BS: %	Associate's: %	High School: %		
	3.1	6.3	25.0	65.6		
Tenure	0-2 Years: %	3-5 Years: %	6-10 Years: %	11-15 Years: %	16-20 Years: %	21-25 Years: %
	28.1	6.3	46.9	9.4	3.1	6.3
Personality Style Diversity	ENFJ: %	ENTP: %	ESTJ: %	ESFP: %	ESFJ: %	ESTJ: %
	9.4	3.1	3.1	3.1	18.8	3.1
	INFP: %	INFJ: %	INTJ: %	ISFJ: %	ISTJ: %	
	3.1	9.4	15.6	9.4	21.9	

P.1a(3) Workforce Profile

WCTC delivers key services through our four key **workforce segments** outlined in **Figure P.1-3**. The associate classification provides service or production-related work; technicians provide technical or specialized work; professionals provide technical or specialized work with a formal knowledge base; and leaders provide higher levels of management of programs and people. WCTC's **workforce diversity** is outlined in **Figure P.1-3** which displays a percentage breakdown of workforce gender, age, race, tenure, and personality styles. Employees are cross trained to support multiple outer-department job functions which increases the flow of knowledge and decreases the negative effects of departmental silos. WCTC has no organized bargaining units. The **key workforce** benefits include health, dental, and life insurance plans, long-term disability, retirement contributions through the Florida Retirement System, paid holidays, annual and sick leave, tuition reimbursement, annual training budget, and certification pay.

P.1a(4) Assets

Major Facilities

The WCTC's main branch is located in DeFuniak Springs. The office covers approximately 5,475 square feet and is the work location for 75% of the total workforce. The Santa Rosa Beach branch covers approximately 2,184 square feet and is the work location for 25% of the total workforce.

Technologies

The major technologies employed by our organization include:

• **Manatron** - Property tax payment system used to collect and process property taxes.
• **Q-Flow -** Transaction ticketing system used to track **branch wait times** *(Result 7.1-1).*

• **FRVIS -** Florida Real Time Vehicle Information System provided by the DHSMV to process vehicle tag and title transaction.
• **FDLIS -** Florida Driver License Information System provided by the DHSMV to process driver license transactions.
• **CSI -** e-Business Company that processes, manages, and reconciles e-check and credit card transactions.
• **Sungard NaviLine** – Accounting, payroll, and purchasing software
• **Apex Business Software** – Time entry recording and accrual & leave management software.
• **Docuware** – Document imaging and storage software.
• **BSC Designer** - Balanced scorecard software used to monitor key performance measures within our four strategic priorities and guide decision making.
• **VOIP -** Phone system that uses internet protocol as a means of transporting calls.
• **Contactual -** System used to manage our customer interaction via phone and chat through a single system.
• **Skype –** Proprietary VOIP service and software application used to conduct various meetings and interviews.
• **Social Media -** Web based and mobile technologies such as Yammer, Facebook, and Twitter used to turn communication into interactive dialogue.

Equipment

• **Hi-Speed Mail Remittance Processor -** Equipment used to process mail transactions and electronically deposits funds by capturing check payment images.
• **Computers -** Integrated personal computers, Laptops, iPads, and smart phones.

P.1a(5) Regulatory Requirements

WCTC operates in a highly regulatory environment. The key regulatory areas and associated performance measures are outlined in **Figure P.1-4**.

Figure P.1-4: Regulatory Environment and Related Key Measures

Regulatory Areas	Key Measures/Indicators
Financial • GASB • DOR	• Number of External Audit Findings/Target 0 *(Result 7.4-2)* • % of PT Funds distributed as statutorily required/Target 100% *(Result 7.1-18)* • % of MV Funds distributed as statutorily required/Target 100% *(Result 7.1-19)*
Accreditation and Certification • CFCA • CPM • CPA	• % of Staff Holding Industry Related Certifications/Target 50% *(Result 7.3-17)*
Occupational Health and Safety • EEOC • Worker's Comp • OSHA	• Number of EEOC Complaints/Target 0 *(Result 7.4-23)* • Number of Worker's Comp Claims/Target 0 *(Result 7.4-24)* • Number of OSHA Reportable Injuries/Target 0 *(Result 7.4-25)*
Products and Services • DHSMV • DHS	• % of Transactions Accurately Processed/Target 100% *(Result 7.1-21)*

P.1 b Organizational Relationships
P.1b(1) Described below are the key components of our **organizational structure and governance systems**:
TC- The Tax Collector, Honorable Rhonda Skipper, is an independent constitutional officer elected every four years who is responsible for collecting taxes on all secured and unsecured property, as she **reports to** the citizens of Walton County. The TC supervises her Chief Deputy, (CD) and the division directors as she serves as a member of the Senior Leadership Team, (SLT).

SLT- The WCTC office is divided into three divisions that include Operations, Administration, and Finance. Each

division is led by a director who guides their divisional employees. All division directors **report directly to** the Chief Deputy and serve as members of the SLT along with the TC and CD. The SLT is responsible for setting modern and imminent direction and ensuring the successful outcome of all mission objectives.

P.1b(2) Customers and Stakeholders
WCTC's customer base consists of three distinct groups in addition to General Key Stakeholders with various requirements shown in **Figure P.1-5**

Figure P.1-5: Key Customers and Stakeholders

Key Customers	Requirements	Key Measures/Indicators
PUBLIC Walk-In Customers, On-Line Customers, Telephone Customers, Walton County Tax Payers, Walton County Tax Payers Association, Walton County Citizens Advisory Council, Motor vehicle/vessel/mobile homes/ driver license customers, Tax certificate investors, Hunters & Fisherman	• Prompt Service • Convenient Payment Methods • Convenient Locations	• Public Customer Satisfaction Rating/Target 95% *(Result 7.2-2)* • Average Branch Wait Time/ Target < 5 min. *(Result 7.1-1)*
BUSINESS Walk-In Customers, On-Line Customers, Telephone Customers, Escrow and title companies, Business owners, Motor Vehicle, Vessel and Mobile Home Dealers; Financial Institutions: Attorneys, Real Estate Companies	• Accuracy • Efficiency	• % of Transactions Accurately Processed/Target 100% *(Result 7.1-21)*
GOVERNMENT Walk-In Customer, On-Line Customers, Telephone Customers, Taxing authorities, WCBCC, Special taxing districts; Municipalities, Walton County agencies, Law Enforcement Agencies	• Compliance • Accuracy	• % of PT Funds distributed as statutorily required/Target 100% *(Result 7.1-18)* • % of MV Funds distributed as statutorily required/Target 100% *(Result 7.1-19)*
STAKEHOLDERS Taxing Authorities, DBPA, WCBCC , DHSMV, DOR, FFWCC, FHP, Walton County Clerk of Court, Walton County Property Appraiser	• Efficiency • Accuracy	• Stakeholder Satisfaction Rating/Target 95% *(Result 7.2-3)*

P.1b(3) Suppliers and Partners
WCTC's key suppliers and partners who serve as collaborators, their roles and responsibilities, and communication methods are listed in **Figure P.1-6**. Our key suppliers and partners play an integral role in our work systems and help us deliver our key services. **AXIS Data Solutions**, **Inc.** is a document management company that mails property tax bills and motor vehicle, vessel, and mobile home renewal notices. These mailings are our primary source of contact with our customers, so timeliness and accuracy are essential. The WCTC also serves as an agent for and partners with DOR, DHSMV, and the FWCC. The roles each play in our delivery of key

services to our customers and the methods of communication with these partners are also listed in **Figure P.1-6.**

P.2 ORGANZATIONAL SITUATION
P.2a Competitive Environment
P.2a(1) Competitive Position
The WCTC serves approximately 57,783 Walton County citizens located within a 1,066 square mile area. The only competition the WCTC encounters is that to neighboring county Tax Collectors capable of providing the services of motor vehicle and driver license transactions to the citizens of Walton County.

Figure P.1-6 Key Suppliers and Partners

Key Suppliers	Services Provided	Communication Methods
• AXIS Data Solutions Inc. • Manatron • Collector Solutions Inc. • PRIDE Enterprises • Realauction.com LLC • ACF Technologies Inc. • PublicSoft Inc • Pitney Bowes	• Tax Bill and Tag Renewal Notice Mailings • Property Tax & Cashiering System • Credit Card and E-Check Processing • License plate and engraving services • Tax Certificate Auctions through Website • Transaction Ticketing System • High-Speed Processing Software • Internal Mail Machine/Postage and Supplies	• Email • Telephone • Mail • Contracts • Meetings • Survey Instruments • Facebook •Twitter
Key Partners	**Role in Delivery of Services**	**Communication Methods**
• DOR • DHSMV • FWCC • WC Property Appraiser • WC Clerk of Courts	• Approves Annual Budget/Issues Operating Mandates • Provides equipment & supplies for issuance of license plates, decals, temporary tags, title documents, and driver licenses • Provides equipment & supplies for issuance of hunting & fishing licenses • Provides annual property value assessments and Tax Roll • Provides Tax Deed Application processing and requested information	• Legislation • Internet • Email • Telephone • Survey Instruments • Facebook •Twitter

P.2a(2) Competitiveness Changes

In 2012, WCTC took on the responsibility of the issuance of driver licenses and identification cards. The implementation of these services in each of the WCTC offices has greatly increased the overall number of transactions resulting in adjustments to annual budgets for the acquisition of necessary equipment, supplies and additional personnel to provide these new services aligned to our mission. This change has also introduced new opportunities for innovation and collaboration with suppliers, partners, and other Florida Tax Collector offices.

P.2a(3) Comparative Data

Key sources of comparative data from within our industry include the DHSMV, DOR, Florida Sterling award-winning organizations, and comparisons to our industry group which includes all TCs in the State of Florida. Limitations in obtaining data include lack of common data definitions and differences in community demographics.

P.2b Strategic Context

Figure P.2-1 outlines our key business, operational, and workforce strategic challenges, and advantages.

P.2c Performance Improvement System

Continuous improvement is one of our strategic priorities and is pervasive at WCTC. WCTC uses a Plan Do Check Act-based, 8-step Process Management approach as illustrated in **Figure P.2-2.** This approach includes mapping and monitoring of processes and a 7-step Problem Solving process used by Process Improvement Teams (PITs) to identify process deficiencies and generate improvements. Opportunities for innovation are identified based on PIT Action Plan submissions, participation in coalitions, user groups and conferences, the annual SCAN and SWOT analysis, and benchmarking practices.

Figure P.2-2 Process Management Approach

8 Step Process Management Approach	
PLAN	1. Prioritize Process 2. Determine Ownership
DO	3. Determine Customer Requirements 4. Flowchart 5. Determine Indicators
CHECK	6. Monitor Performance
ACT	7. Identify Opportunities 8. Take Action

Figure P.2-1 Strategic Challenges and Advantages

Strategic Context	Challenges	Advantages
Business	1. Providing full service driver license operations 2. Compliance with Real ID Act	1. Service provided with care
Operational	3. Limited space 4. Budget restrictions	2. Leverage of technology
Workforce	5. Competitively compensating staff	3. Knowledgeable and cross-trained staff

Leadership

1.1 Senior Leadership
1.1a Vision Values, and Mission
1.1a(1) Vision and Values

Tax Collector, the Honorable Rhonda Skipper, and her team have created a high performing organization that features a team based culture promoting personal development and a shared passion for performance improvement. Team members at all levels are involved in policy development, decision making and process improvement initiatives. Strategic planning has been ongoing at the office of the WCTC since 2005. During the years that followed, the SLT received extensive training on the SPP and Process Improvement Tools. By 2009, the SLT was directly involved in the development of the Strategic Plan to include: Visioning, Environmental Scanning, Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis, and brainstorming of strategic priorities and objectives. Performance measures were then identified and WCTC was well on the way to becoming a true continuous improvement organization. The result has been the evolution of an organization that places great value on organizational health by building a cohesive leadership team that has created clarity of purpose.

During the initial steps of the annual SPP, **Figure 2.1-1**, a review is conducted to re-discover WCTC's purpose and set the organization's vision and values. The deployment of vision and values to the workforce, suppliers, partners, customers, and stakeholders is vital to the success of WCTC. **Figure 1.1-2** outlines how SLs set, communicate, deploy and reinforce the vision and values through the leadership system. Mission, vision, and values (MVV) are communicated to key suppliers, partners, customers and stakeholders through WCTC's website, quarterly e-blasts, web surveys, annual reports, Facebook, Twitter, the "Journey to Excellence" blog, customer comment cards, mail inserts, R.A.T.E program, office tours, public presentations, and media releases. WCTC's strategic plan, "Journey to Excellence", has been available on the internet, intranet, and blog since December of 2010.

The most important means of demonstrating the values of WCTC is through the actions, methods, and behaviors of the SLT. Inspired by a reading of "The Advantage" by Patrick Lencioni, the SLT places a priority on organizational health by deploying the 4 disciplines of Organizational Health: 1. Build a cohesive leadership team, 2. Create clarity, 3. Over communicate clarity and 4. Reinforce clarity. Beginning with the SLT, WCTC seeks to build trust, eliminate politics and increase efficiency. By completing and discussing personality profiles of all employees WCTC seeks to know and understand each other's strengths and weaknesses. SLs openly engage in

constructive ideological conflict. Employees hold each other accountable for behaviors and actions. Values are personally reinforced by SLs through the hiring practices, performance management, reward and recognition, training and development programs and employee discipline and/or termination. Strategic priorities, objectives and daily methods, behaviors and attitudes are all linked or evaluated to ensure alignment with mission, vision and values.

Figure 1.1-1 Patrick Lencioni's "4 Disciplines of Organizational Health"

1.1a(2) Promoting Legal & Ethical Behavior

SLs promote and demonstrate through actions a legally compliant and ethical work force that has reinforced the trust and confidence of the citizen customers it serves. WCTC's ethics policy was established in 2005 and is reviewed and updated at least annually. The ethics policy is presented during new hire orientation and is reinforced during mandatory annual policy reviews for which the workforce confirms their personal review with a signed receipt, (*Result 7.3-20*).

WCTC files annual financial and gift disclosures as mandated by state policy; and receives continuing education, mandated by the Florida Department of Revenue, (DOR) which includes ethics updates provided by the Florida Ethics Commission. The organization's policies on ethics, harassment, and diversity are posted on the intranet site for ease of workforce access. WCTC demonstrates transparency and builds public trust by readily providing budget, policy and financial audit information via the open government webpage, and promptly complying with all public records requests.

1.1a(3) Creating a Sustainable Organization

SLs create a sustainable organization through a variety of ways beginning with the SPP. Through the SPP, SLs identified the following four organizational strategic priorities based on core competencies, stakeholder feedback and data from a number of internal and external sources: 1) Customer Focus, 2) Accountability and Accuracy, 3) Relentless Pursuit of Improvement, and 4) Engaged & Empowered Workforce. SLs establish performance expectations, budget and resource allocations, timelines, and targets to ensure the deployment and successful achievement of these priorities and their associated Strategic Objectives. Strategic objectives are developed in a series of joint meetings of the SLT, supervisors, and assistant supervisors.

WCTC's team approach encourages employee involvement in the implementation of the MVV, and strategic priorities. Through this approach SLs create an environment for the achievement of mission, improvement of organizational performance, performance leadership, and organizational and personal development and learning.

SLs create a focus on improvement of organizational performance through the "Relentless Pursuit of Improvement" strategic priority. Performance and process improvement needs are identified in step 6 of the 8-step Process Management approach (**Figure P.2-2**) by SLs, process owners, task performers, or managers during: 1.) Daily process monitoring by task performers and supervisors; 2.) Departmental team meetings; 3.) Monthly SL strategy review meetings; 4.) Monthly strategic plan reviews; 5.) Director meetings; and 6.) Based on mandates, legislative and regulatory changes, and feedback received from stakeholders regarding their needs and requirements of products and services. Next, Step 8 of the Process Management approach is used by PITs to improve processes not meeting target and/or stakeholder needs and requirements using the 7-step PDCA Problem Solving Process (**Figure 1.1-3**) and other related tools and techniques. PITs are formed consisting of team members with the greatest process knowledge to identify potential solutions as well as members unfamiliar with the process to provide objective insight. PITs determine goals and objectives, ground rules, team roles, and scope of work. Depending on the goals, training modules such as 7-step PDCA Problem Solving or a Cause and Effect Diagram, may be deployed by a facilitator to help the team get started. The team will review or map the "as is" process first to help get a better understanding of where opportunities for improvement exist. To drive organizational learning and innovation, process improvements and lessons are shared via email, organizational review meetings, Yammer, and intranet. Additionally, in 2010, the WCTC Opportunity team was established to ensure lessons are sought out and learned from other organizations that could benefit WCTC.

SLs place high importance on organizational and employee learning. SLs allocate funds for personal learning through individual training budget allocation (**Figure 1.1-6**), tuition reimbursement program, paid enrollment in job and performance enhancement training, and paid attendance for various educational conferences, user group meetings and coalitions. SLs mandate training for management in leadership development to enhance and improve supervisory skills, problem solving, and interview skills. The SLT also provides paid participation in DOR's Certified Florida Collector Assistant program and The Florida Center for Public Management's Certified Public Manager (CPM) program to improve performance and learning for those team members interested in developing their careers in tax collection, government and public management. Management and supervisory team members are encouraged to participate in the Walton County Chamber of Commerce's Leadership Walton program as well as the Dale Carnegie Leadership certification program which promotes networking, enhanced management, and supervisory skills. All team members attend specialized training sessions. The supervisor team conducts reviews on books that focus on leadership and management skills and abilities as a part of their monthly meetings. Through this variety of learning mechanisms, SLs promote professional and personal development for all employees. In addition to providing a training budget to each team member, a comprehensive training program is provided that guarantees access to knowledge and skills in a variety of areas to enhance their abilities, job knowledge, and performance from the start of employment. SLs also host an annual, mandatory "All Hands" Retreat to educate all team members about key topics to organizational success.

SLs actively participate in the legislative efforts of the Florida Tax Collectors Association, Inc. (FTCA), which is an association consisting of all 67 Tax Collectors in the state. This association works diligently to ensure that legislation detrimental to TCs, their citizens, and taxpayers does not pass while lobbying for legislation that would be deemed beneficial to TCs statewide. Tax Collector, the Honorable Rhonda Skipper, served as Region One Director for the FTCA during 2006 and in 2013, and was selected as Secretary for 2014. During her terms, the FTCA worked closely with legislative committees concerning the rewrite of FL Statute 197 and the increase in fees retained by TC offices upon the implementation of services that were previously offered through state offices.

SLs create a workforce culture that delivers a consistently positive customer experience and fosters customer

engagement through the strategic priority of Customer Focus. During the SPP, SLs develop the strategic objectives and goals aligned with this perspective addressing the critical need of providing customers with quality service.

In order to create an environment for innovation and intelligent risk taking, SLs continually encourage team members to seek innovative ways to improve the organization. In March of 2011 team members were assigned a 3-5 minute presentation to the SLT in an effort to improve public speaking skills. One optional topic suggested was to present an innovative improvement to any current work process As a result of this assignment the following innovations were initiated or are slated for future implementation: E-mail delivery of tax bills, more comprehensive use of social media, CPR & First Aid Certification for core employees, VIN applications for smart phones, Peer Mentoring, Tablet Computers, Check 21 Remote Depositing, use of validation printers, express lanes in both branches, audio announcements, return mail procedures, and the reclassification of employee titles. In 2012, based on a PIT recommendation the traditional governmental conference rooms were redesigned, transforming them into bright, colorful and inspiring spaces that promote innovation and teamwork. SLs incorporate technological advances as a part of daily work patterns. These include the use of iPads, iPhones, Yammer, and social media applications to expand availability of services and information sharing beyond regular office hours.

WCTC maintains organizational agility through its SPP, frequent review and update of plans, formalized systems, process management, employee empowerment and team involvement, and by promoting a culture of continuous improvement. During the annual SPP, SLs conduct an environmental scan of both external and internal factors to allow anticipation of the need for systems change and to prioritize objectives. The SP is updated and reviewed monthly during SP meetings to address strategic challenges and reprioritize, change or add action plans as needed. Action plan statuses and updates are also discussed during monthly supervisor level and departmental meetings.

SLs are active in the development of future WCTC leaders. SLs review goals established in workforce Individual Career Development Plans (ICDPs) and discuss potential succession opportunities for top-performers. SLs have established promotional criteria and skill competencies that far exceed position requirements. All team members are taught the educational and organizational involvement requirements. Since 2009, a 360º evaluation process has been utilized to create action

plans (including ICDP) for SLs. WCTC offers job shadowing opportunities to all team members to promote life-long learning and enhancement of job skills. These opportunities allow employees to learn how the different departments and positions all work together towards one common goal. The ICDP process is then utilized to address gaps. SLs work one on one in a mentoring relationship with Assistant Supervisors, Supervisors, and other potential leaders. Mentoring activities include attendance at leadership meetings and preparation of business results to be presented during monthly meetings. The mentoring and preparation process helps to ensure a retiree's knowledge is retained prior to retirement. In 2012, in anticipation of the retirement of the Director of Operations, the SLT pre-selected the Director in waiting and communicated this transition strategy to the organization. This provided a one year transition period of job shadowing to prepare the incumbent for her new role and responsibilities. This transition strategy was continued with great success for the additional supervisor and assistant supervisor vacancies that resulted.

1.1b Communication and Organizational Performance
1.1b(1) Communication
SLs communicate with and engage the entire workforce through multiple channels and methods, beginning with a policy of open and honest communication throughout the entire organization. Examples include SL office visits, departmental meetings, Yammer, intranet, monthly "Good to Great" meetings, email, and the Journey to Excellence blog. SLs encourage frank two-way communication throughout the organization by promoting honest & open feedback and welcoming ideas, thoughts, opinions, and viewpoints from and between all team members. SLs empower employees by offering the opportunity to improve their work process through PIT and focus groups. SLs communicate key decisions to every level of the organization through departmental team meetings; monthly "Good to Great" meetings – a round table discussion that is an open forum for all employees; SLT meetings; monthly supervisor and assistant supervisor meetings; weekly department meetings; Yammer; intranet; e-mail updates; monthly SP reviews; committee meetings; PIT meetings; and face to face communication.

Despite constraints of employee reward and recognition in a government agency due to funding limitations, SLs have developed several creative and innovative ways to reward and recognize the workforce. Informally, SLs are personally engaged in reward and recognition through announcements during monthly Good to Great meetings, employee of the quarter award, e-mails, and "Thumbs Up" awards to recognize team members for outstanding customer service or teamwork efforts. SLs issue personalized individual rewards to team members at the annual Christmas dinner. A Customer Service

appreciation week is hosted annually in October to recognize the outstanding efforts of team members and their hard work and dedication to the WCTC office. Other reward and recognition mechanisms are addressed in Category 5.

SLs communicate with and engage key customers in a multitude of ways including bi-annual dealer training, education of legislative mandates and changes, press releases, and social media postings.

1.1b(2) Focus on Action
The SLT creates a focus on action to accomplish objectives, improve performance, enable innovation and intelligent risk taking, and attaining the stated vision first and foremost through the SP. The SP includes action items and timelines for completion which is shared across the organization via a comprehensive web-based solution MSP. A series of reviews such as monthly strategy review meetings and operational review meetings are held to ensure focus on strategic objectives, performance, and actions. These meetings include reviews of performance measures and offer the opportunity to discuss objectives and action plans and modify as needed.

SLs focus on creating value for customers and stakeholders during the SPP. Customer Focus is a strategic priority and strategic objectives and action items are identified to add value for both customers and stakeholders. Balancing the value for customers and stakeholders comes in the prioritization of the objectives and action items. SLs prioritize objectives after reviewing the value provided against the resources needed to determine which objectives should be a current focus or future focus.

1.2 Governance and Social Responsibility
1.2a(1) Governance System
The ultimate test of the community's trust and confidence in the ability of an elected government official to protect the stakeholders' interest occurs by the vote of the electorate. Since first elected in 2005, TC, the Honorable Rhonda Skipper has been re-elected without opposition proving Walton County has full confidence in the WCTC's office to provide prompt, courteous, accurate, professional, cost-effective, and innovative services.

Our formal governance system consists of a number of components including both internal and external audits. Annually, we undergo external audit by the Florida DOR, State Auditor General and the Certified Public Accounting firm of Carr, Riggs, and Ingram, *(Results 7.4-2, 7.4-3)*. Since 2005, these reviews have resulted in no significant findings. Additionally, the WCTC has earned recognition by the FTCA, for Excellence in Finance Operations the past three years.

Fiscal accountability and security of Financial related IT systems is ensured through annual internal audits and daily cash counts, through a decentralized budget and review process, and through an external, independent audit conducted annually by Carr, Riggs, and Ingram, CPA.

Transparency of operations and disclosure are enforced through state and federal laws mandating public access to government records and financial reports. Most of this information is available publically on the WCTC website's Open Government Page, however, any information requested is available by public records requests through multiple channels. WCTC strictly enforces compliance with all Florida Sunshine Laws and records management requirements. A public records custodian has been designated and receives annual training and certification through the Department of State.

Annually, all employees must review and document their refresher training on all high liability policies to include: Ethics, Official Travel, Leave and Attendance, ADA, Drug Free Workplace, Worker's Compensation Benefits, HIPPA, and Public Records Requests, to ensure compliance, *(Result 7.3-20)*.

Our accountability for operational effectiveness, management and the protection of stakeholder/partner interest is ensured through monthly operational review meetings and the SPP. SLs are accountable for meeting or exceeding performance targets, which are captured in BSC and MSP, and reviewed during operational meetings. This review includes discussion of performance improvement needs, solutions in all target areas, and documented as short term action items to the strategic plan for improvement. SLs are responsible for carrying out the strategic plan. Action items assigned to each SL are reviewed during monthly strategic planning meetings to assure accountability for meeting deadlines and budget targets.

1.2a(2) Performance Evaluation
The WCTC uses a wide range of non-traditional tools to evaluate SLs. The annual Employee Engagement Survey asks questions pertaining to the performance of SLs, and external customer, stakeholder/partner, and vendor survey satisfaction ratings indicate the successful performance of the SLT. The performance of each SL is evaluated annually through the Individual Career Development planning process and inventory of Leadership Competencies. Both are reviewed routinely, but formally at 6 month intervals. The Leadership Competencies inventory includes 360 degree survey feedback from the individual being assessed, their supervisor, and their peers.

Both the Individual Career Development Planning and Leadership Competencies inventory began in 2010, as an alternative to the traditional Performance Appraisal, which did little to accomplish the desired outcomes of improved performance, timely feedback, developmental opportunities, and goal setting. Opportunities for improvement are identified based on the results and ICDPs are modified to address developmental shortcomings. Performance Improvement Plans are deployed to address specific performance deficiencies in accordance with WCTC's progressive discipline policy. The performance of the elected Tax Collector is evaluated through the employee engagement and stakeholder/partner and customer surveys which include feedback from other constitutional officers, elected officials and the executives of each of the Taxing Authorities served. As an elected official, the Tax Collector receives the ultimate survey every four years in the form of the election process. The current Tax Collector was elected in November 2004 with 72% of the general election vote, and was unopposed in the subsequent elections of 2008 and 2012. Performance of SLs is also gauged by the success of meeting and exceeding performance goals, *(Result 7.4-16),* as well as finding-free financial audits, *(Result 7.4-2)*. As a result of the evaluation methods implemented, SLs have utilized feedback to improve in the following areas: enhance and expand communication channels to allow for more team collaboration across the organization, build relationships and collaborate with other government offices, and develop stronger teams to work towards process improvement. WCTC efforts have been validated though recognition from the Okaloosa Walton Economic Development Councils 2005 Workplace of Excellence Award, the 2011 Florida Trend "Best Companies to Work For in Florida" award; the 2012 Walton Tax Payers Association Best Practices Award; the 2011, 2012, and 2013 Florida Tax Collector's Finance Excellence Awards; the 2012 Excellence in Leadership Award presented to the TC by the South Walton Republican Women's Federated; and U.S. Congressional Recognition for innovation, vision, devotion, and exemplary leadership in 2013.

SLs also use continuous education through self-study, formal training, and learning about the best practices of other successful organizations to help improve in their respective areas. These activities have resulted in a number of personal and overall improvements in the leadership system.

1.2b Legal and Ethical Behavior
1.2b(1) Legal and Regulatory Behavior
Adverse impacts of WCTC services and operations on society are addressed through periodic monitoring of key compliance process measurements. Legislation impacting WCTC services produce the greatest threat of adverse

impacts. Serving as the agent for DOR, FFWCC, BCC, and DHSMV, any mandated legislative change to these related processes and procedures will in most cases affect operations. In an effort to better prepare for and maintain the ability to quickly adjust to these changes, legislative bills are researched and tracked beginning at the start of each legislative session. Weekly updates from the FTCA legal counsel and executive director stationed in Tallahassee are received and reviewed. Action plans are developed and reviewed during monthly strategic review meetings to identify necessary or potential adjustments. Adjustments are made to processes and procedures as needed to address legislative changes either through immediate action for minor changes or through the SPP for major changes.

WCTC has created multiple channels of communication to anticipate and address public concerns with current and future services. These channels include face to face, email, social media, phone, live chat, and the WCTC Customer Relations Department is tasked with receiving public input concerning current and future services and operations. SLs address public concerns through constant communication with all stakeholders, direct communication, surveys, "Open Government Page" on the WCTC website, and various meetings. The WCTC also files an annual report addressing the responsible management of funds by providing financial information including expenditures, revenues, and total funds distributed. This document is available on the "Open Government Page" of the WCTC website. Stakeholders are concerned with fast, accurate, and friendly service, well-trained team members, fiscal responsibility and effective processes. These concerns are proactively addressed through the SPP described in Category 2.

WCTC strives to meet or exceed all regulatory and legal requirements. Key compliance processes, measures, and targeted goals are outlined in **Figure P.1-4**.

1.2b(2) Ethical Behavior
Ethical behavior is promoted in all interactions through WCTC's ethics policy; constant communication with SLT, employees, customers, suppliers, partners and stakeholders; education and training during onboarding of new hires, and an annual Conflict of Interest disclosure which is mandatory for Elected Officials. The ethical standards and expectations of the WCTC's office are communicated to employees during New Hire Orientation. Employees review policies 103 and 103.01 regarding Ethics and Employee Conduct. These policies provide guidelines to ensure behaviors are both ethical and appropriate. During orientation, new team members review and sign the WCTC Employee Handbook, acknowledging awareness of WCTC's commitment to the ethics policy as

well as other WCTC policies. The Tax Collector and Chief Deputy Tax Collector then hold a discussion with each new employee to further emphasize these points. Ethical behavior is monitored in several ways. These include: using security system and cameras monitored 24 hours a day – 7 days a week, vault audits, and internal cash counts. All Team members are also trained to identify fraudulent transactions and documentation.

Other key measures of promoting ethical behavior include: number of ethics complaints, *(Result 7.4-4)*, Number of EEOC complaints, *(Result 7.3-23)*, and Percent of staff signing annual ethics policy review, *(Result 7.3-20)*. Some feedback mechanisms include employee satisfaction and engagement surveys, *(Results 7.3-1 to 7.3-14),* and customer satisfaction surveys, *(Result 7.2-1).*

WCTC's policy on Ethics and Conduct as well as the process to report violations are available on the intranet site and are reviewed annually during mandatory ethics training and Employee Handbook review and acceptance. When in doubt, employees are encouraged to address areas of concern using the chain of command. All instances of non-compliance with ethics policy are investigated by the Chief Deputy Tax Collector and/or other appropriate SLs and addressed immediately. If necessary, an ethical violation may be turned over to law enforcement for further investigation. Disregard or failure to comply with the standards of business ethics and conduct could lead to disciplinary action, up to and including termination of employment.

1.2c Societal Responsibilities and Support of Key Communities
1.2c(1) Societal Well-Being
WCTC considers support of the community and societal responsibilities to be vitally important to the organization. This belief is addressed in the cultural values of WCTC- Seek Opportunities to Serve Others. WCTC actively supports and works to strengthen our key community, Walton County, while striving towards the primary goal of delivering the highest quality of service with people who CARE. Initiatives focus on educating constituents, promoting public awareness, and serving others. WCTC gives back to the community through public awareness programs that are designed to inform and support citizens and taxpayers. Programs such as R.A.T.E. (Remote Access Tax Express) take WCTC services into the community. Additionally, community events such as the Walton County Fair, Senior Career Fair, and the Cooking Show give WCTC an opportunity to connect with and educate the community in an environment away from the office. Additionally, communicating to the public through public service announcements to remind taxpayers of deadlines

and inform them of information as it is released from the legislature are instrumental in creating partnerships between WCTC and the community. WCTC participates annually in community improvement and wellness fundraising initiatives supporting causes such as: The American Heart Association, The American Cancer Society, The Walton County Chamber of Commerce Foundation, Angel Tree, Thanksgiving Food Drive, Kiwanis, Boys and Girls Club of the Emerald Coast, St. Jude's Children's Research Hospital, Emerald Coast Children's Advocacy Center, Pregnancy Support Center, Lauren's Kids, Donate Life, Bare Necessities, Ronald McDonald House, and a Tornado Relief Drive for the victims of the 2011 Alabama tornados. The selection process is driven by the non-profit Employee Fund and supported by employee interest surveys where team members are given the opportunity to vote on annual charitable initiatives. WCTC selects two charities to focus on annually, but are open to supporting the needs of the surrounding community as they arise.

SLs work along with all WCTC employees to participate in and provide monetary and in-kind support of approved fund-raising events that benefit both charitable organizations and internal WCTC events such as the annual Christmas Party, Company Picnic, Gospel Sing, Halloween Chili Cook-Off and Costume Contest. At a suggestion from our Opportunities PIT notary services are provided at no charge but donations to our supported charities are welcomed for these services. SLs have reached out to the community to build public relationships by serving on local and state boards, industry related coalitions, mentoring at risk youth, as well as volunteering their knowledge and best practices. **Figure 1.1-5**

Figure 1.1-2 Communication, Deployment and Reinforcement by SL

Leadership Components	How Senior Leaders Set	How Senior Leaders Communicate, Deploy and Reinforce	
Mission, Vision, Values & Strategic Priorities	Strategic Planning: Direct Feedback and Input from all Stakeholders, SWOT Analysis, Mission & Vision Updated	MyStrategicPlan.com, Face to face dialog and Yammer discussions, Staff meetings, Strategic Plan One page document, Business Cards, Surveys, Training, Orientation & Onboarding,	Culture Pledge, Blog, Customer Service Training, Annual All Hands Retreat, Awards, Intranet, Website, Mailing Inserts, Correspondence
Performance Expectations	Strategic Planning, ICDP, Leadership Development Roadmap	ICDP Reviews, PIT, Training, Performance Improvement Planning, Discipline Process	Scorecard Business Results, Monthly Good to Great Meetings, Staff/Departmental Meetings, Action Plans
Creating Value for Customers, Partners & Stakeholders	Employee, Customer, Partner & Supplier Surveys; Strategic Priorities, Benchmarking/ Legislative Involvement, Policy	Survey Results, Conferences, Coalitions, User Group Meetings	Training, Role Modeling, PIT
Establish and Reinforce Empowerment	Sterling Model for Organizational Performance Excellence, SWOT, Open Door Policy, Plan Do Check Act	Employee Engagement Survey, Employee Benefits Survey, Customer Service Standards, Training, , 360 Survey	PIT/Customer Service, Accuracy & Accountability, Relentless Pursuit of Improvement, Employee Engagement & Empowerment
Organizational Agility	Strategic Planning, Employee Empowerment, Training	Strategic Priorities, Strategic Objectives, PIT, Staff Retreat	Strategic Action Item Review, Training, Balanced Score Card

Figure 1.1-3 Problem Solving Approach

7-Step Problem Solving Approach	
Plan	1. Describe the problem.
	2. Describe the current process.
	3. Identify root causes.
	4. Develop a solution and action plan.
Do	5. Implement the solution.
Check	6. Check the results.
Act	7. Reflect and act on lessons learned.

Figure 1.1-6 Individual Education Budgets

Annual Individual Education Budget	
Pos. Class.	**Amount**
Associate	$200
Technical	$400
Professional	$750
Leader	$950

Figure 1.1-4 Engagement and Motivation of Workforce

Modes of Motivation/Empowerment	Description
Recognition Programs	Employee of the Year; Employee of the Quarter; You Rock Award; Jean Day; Thumbs Up Award, Customer Service Week
Good to Great	Meets monthly: Agency wide meeting for shared communication between staff and SL
Employee Fund	Meets monthly; All departments represented; implements community initiatives and internal fundraisers and events.
Relentless Pursuit of Improvement Team	Meets as needed to discuss best practices and process improvements.
Leadership Decision Making	SL, Supervisors, and Assistant Supervisors empowered to make decisions daily and delegate to appropriate staff; Management given leadership roles for action plans
Public Presentations	TC delegates public presentations, media interviews, outreach events and town hall meetings to SLs. SLs empower front-line employees to volunteer to participate in these events as well.

Figure 1.1-5 Community Relations & Participation

Program	Purpose	Details	WCTC Participation
Promotional Campaigns	To promote specialty license plates to raise funds for specific causes.	Monthly or quarterly promotions to include office displays. May include staff/customer participation incentives and speaker's bureau	Donate Life, Lauren's Kids, Harbor Branch, Manatee & Turtle Decals, Family First, Veterans, Challenger Plate, Aquaculture and others
Community and Fundraising Events	Promote community involvement	Fundraising or program awareness by WCTC employees and customers	St. Jude Children's Research Hospital, Boys & Girls Clubs, Child Advocacy Center, Tornado Relief, Christmas Angel Tree, Thanksgiving Food Drive, Pregnancy Support Center, Fair, Cooking Show, Career days, Walton Youth Leadership, Mentoring, and many others
Inserts	Promote online services, community events, & charities	Marketing inserts mailed with registration renewal notices or property tax bills	RATE Program, Online services, tag & charitable promotions
Marketing	Promote public awareness of WCTC services	Press releases, print, radio and TV ads, brochures	Facebook, Twitter, Blogs, Registration birthday reminders, policy updates, important deadlines

Strategic Planning

2.1 Strategy Development Process
2.1a(1) Strategic Planning Process

Strategic planning has been ongoing at the WCTC since 2005. Initial efforts were led by the Chief Deputy Tax Collector who is a 2000 graduate of the Certified Public Manager (CPM) program and was very knowledgeable of the Sterling Business Model based on his prior career with the Florida Department of Corrections. For the three years that followed, the SLT received intense training on the SPP, Sterling Business Model, and Process Improvement Methods and Tools. By 2009, the entire SLT was directly involved in the development of the strategic plan to include: environmental scanning; SWOT Analysis; defining our purpose, vision, core values; and brainstorming of our strategic priorities and objectives. Performance measures were then identified allowing WCTC to become a true continuous improvement organization. In 2010, SL adopted a formal, 9-step SPP. **Figure 2.1-3** outlines the SPP improvements made throughout the years. SP meetings consist of an annual meeting with reviews and updates conducted during monthly Operational and Strategy reviews and action plan progress reviews conducted during the bi-weekly SL Operational meetings. During our monthly Strategy reviews the SLT focuses on "Are we working on the right stuff?" This includes a functional review of each Division where each Division director leads a conversation related to their work units accomplishments, exceptions, and solution to address gaps in performance. This is followed by a thematic review of our organization's strategic objectives. In order to address potential blind spots, SL presents any new information obtained from a systematic review of trends, articles, publications, social media monitoring, legislative tracking, etc. During the monthly Operational review meetings, the SLT reviews "What we are doing?" with comprehensive review of action plans, work unit goals and performance results. The format of annual planning meetings and the monthly reviews are very similar. The annual meeting, however, is more comprehensive and addresses some issues not necessarily discussed in the review and update process. For example, MVV, strategic priorities, and core competences are reviewed and a SWOT analysis is conducted annually during the annual meeting, while action plans are reviewed monthly. Our strategic planning model is reviewed and evaluated annually by SL to ensure its sustainability. In 2013, primarily as a result of our participation in the Sterling Explorer process, which highlighted our need to deploy a solution to communicate and integrate our strategy across the organization, our strategic planning model was improved and streamlined to a 6 Step process that balances the short (1 year) and long term (3-5 year) horizons.

Our SPP, **Figure 2.1-1,** includes the following steps: 1. (Re)Discover our purpose; 2. Assess our strategic position; 3. Develop our Strategic Priorities; 4. Develop our Objectives/Goals; 5. Align our people and financial resources; and 6. Execute our plan. During **Step 1: (Re) Discover our Purpose**, SLs review, reaffirm and/or revise the MVV. An annual review is conducted to re-validate our MVV, strategic priorities, and core competencies to ensure reinforcement and alignment. Our Vision was revised in 2010 and again in 2011 to ensure understanding and a clear view of the future among employees, and our mission and core values were revised in 2011. **Step 2: Assess our Strategic Position**-WCTC conducts a comprehensive Environmental SCAN annually, which helps senior leaders identify emerging trends or issues related to legislation, population, technology, customer satisfaction and the economic climate. Environmental scanning is the acquisition and use of information about events, trends, and relationships in an organization's external environment, the knowledge of which would assist management in planning the organization's future course of action. Also included in the SCAN is a consideration of all stakeholder needs and requirements based on analysis of data received from employee, customer, supplier, and partner surveys. Information received from coalitions, user groups, and conferences is also included in the SCAN. WCTC has conducted an annual SCAN since 2009. Also in step 2, WCTC conducts a SWOT analysis with participation from supervisors/managers who gain feedback from all employees annually. The SWOT analysis has been part of our SPP since 2009 and is improved annually. SWOT analysis worksheets and other process improvement tools are available on our web based strategy solution MSP. **Step 3: Develop Our Strategic Priorities**-. SLs ensure that strategic priorities are closely aligned to core competencies to ensure we are constantly leveraging our advantages. **Step 4: Develop our Objectives and Goals**-An annual review and update of our strategic challenges and advantages based on the results of our SCAN and prioritized list of proposed goals/objectives is conducted. An annual SL review and update of our priorities, objectives and measures, both at the organization and department levels, to ensure all input, feedback and goals are addressed on our strategic plan is conducted. Stretch targets are also set for some measures with relevant benchmarks based on comparative data collected by our benchmarking teams. **Step 5: Align our people and financial resources -** SLs complete a Cost-Benefit Analysis (CBA) for all non-mandated action plans with an estimated cost greater than $10,000. If calculations

determine a Return on Investment (ROI) will be realized in less than three years, the action plan is approved. Those with an ROI of more than three years must be re-tooled to meet the requirements or they are dropped. In addition, we conduct an organizational and staff alignment analysis in relation to our Priorities, Goals and Objectives. **Step 6: Execute our Plan**-. Action plans are developed and all resource needs, tasks and deadlines are documented as a collaborative effort of the designated senior leader (owner) and his/her action plan team. In addition, funding requirements for each action plan are added as new line items in our budget system by the owner. Action plan progress is reviewed by SLs monthly during strategic plan reviews using our action plan tracker. Progress is also reviewed during directors' meetings and is reinforced by the TC through monthly "Good to Great" meetings and SL status updates. As requirements change or unforeseeable adjustments are needed (i.e. due to legislative mandates) action plans may be re-prioritized. The plan is communicated and deployed to all team members by their supervisors and reinforced by SLs through process tracking. A SL review of the finalized prioritization matrix of each of the proposed action plans based on cost, legal requirements, impact on customers, and alignment to our mission, vision and values is completed. All approved items become potential organizational action plans and are assigned to the appropriate SL and/or PIT. Some items identified as "quick fixes" are assigned to the appropriate SL for fast implementation at the department level. Participants in our SPP primarily include the Tax Collector, the Chief Deputy Tax Collector, and other SLs. Planning updates are also provided during monthly production meetings through our organizational balanced scorecard which aligns to our SP. WCTC determines our strategic challenges and advantages as part of the SPP through a systematic and continuous review of customer, employee and process performance data; feedback from our customers, partners, suppliers and employees; and a review of legislation that could affect our budget and/or operations. This is done as part of the SWOT requirements review and the SWOT analysis. Each of our strategic priorities and their strategic objectives has a set of action plans to ensure successful achievement of our goals/targets, and specific SLs are assigned to oversee each individual action plan. SLs establish performance expectations, budget and resource allocations, timelines, and targets to ensure the deployment and successful achievement of these priorities and their associated Strategic Objectives.

2.1a(2) Innovation
The WCTC physical work environment has been designed to facilitate innovation by providing a collaborative, open office design and meeting space that stimulates creativity through a comfortable, colorful and functional design. Our conference rooms were redesigned by a cross functional PIT incorporating the creative input of our entire team, to include naming them "Innovation Lounge" as opposed to conference rooms. WCTC has assembled an Opportunity Team assigned to conduct continuous environmental scanning and benchmarking to identify best practices, trends, customer demographics and innovation in both public and private sector industries. We have also established benchmarking partners both in the tax collector industry and private sector including former Governor's Sterling Award winners Hillsborough County Tax Collector, Manatee County Tax Collector, and Pinellas County Tax Collector as well as private sector corporations such as Zappos and Chick-fil-A. The WCTC office stays up to date with industry trends, threats and opportunities to improve through membership and affiliation with professional associations to include Florida Tax Collector's Association, Florida Public Relations Association, Society for Human Resource Management, the Florida Public Personnel Association, Florida Society of Certified Public Managers, Florida Government Finance Officers Association, and others. Our office routinely participates in the various Florida Tax Collector coalitions and with our major vendors through user groups. WC constitutional officers meet quarterly to discuss local issues and opportunities. These affiliations help us to stay abreast of changes in both industry standards and technology. SLs deploy Google News search tools to identify and review all news articles throughout the world that contain the words "tax collector". Relevant articles are then presented during monthly SL Operational meetings and are shared with all employees to foster a world view of the industry and to promote innovation and to avoid potential threats. Information and data from the numerous mentioned are reviewed during SL monthly meetings and considered in relation to our current core competencies in an effort to determine if new or modified competencies are needed going forward.

2.1a(3) Strategic Considerations
The key factors in determining the WCTC SP are found in **Figure 2.1-5**. Potential issues that could impact the office as strategic advantages or challenges are identified through SWOT analysis, and during monthly SL Operational Review meetings. For example, team members identified lack of communication as a major concern in a workforce satisfaction survey conducted by the WCTC office. Through SWOT analysis the SLT implemented a monthly "Good to Great" meeting where ideas and information is shared with all departments and employees in attendance. Yammer (an in house social media format) has also been implemented to keep employees up to date on recent office events and solicit feedback and input. Risks to our

organizational sustainability are also identified through environmental scanning and information sharing obtained through user group meetings, coalitions, legislative studies, and best practice research. Potential blind spots in our SPP are identified through the use of Environmental scans, SWOT analysis, research and tracking of proposed legislation and rule or law changes that would potentially have a direct impact on our organization. SLs are accountable for the execution of our SP, specific action items, and progress toward goals; and performance is reviewed bi-monthly in separate Operational and Strategy meetings.

2.1a(4) Works System and Core Competencies
WCTC's work systems, key services, and support services are outlined in **Figure 6.1-1.** Work System decisions are determined by SWOT analysis and environmental scanning along with multiple other approaches. TC's duties and responsibilities are governed by FL Statute, DMS and DOR rulings, and legislative mandates. As part of the SPP SLs evaluate legislative mandates and proposed statutory and rule changes that will affect our work systems and key services to determine the need to incorporate deployment into our strategic objectives and organizational goals. Future work systems and competencies are determined by identifying opportunities and industry trends in our annual SPP, and bi-monthly during our SL meetings.

2.1b(1) Key Strategic Objectives
WCTC's key strategic objectives are to be achieved within the next 5 years. Key strategic objectives and their most important goals are shown in **Figure 2.1-4**. Recent changes in government structure have the potential to broaden our key services to include the issuance of Florida birth certificates, concealed weapons permits, and certification of official records. These duties will bring in added revenue to aid in the cost of unfunded legislative mandates such as the issuance of driver licenses.

2.1b(2) Strategic Objective Considerations
WCTC strategic objectives were developed in a series of joint meetings of SL, supervisors, and assistant supervisors. SWOT analysis is applied to each of the four Strategic Priorities as defined in step 1 of the SPP. Continuous improvement is one of our strategic priorities and is pervasive at WCTC. Our Decision Support System (DSS) **Figure P.2-2** integrates processes that drive improvement and innovation at WCTC. This system begins with Performance Management at the front-line. WCTC uses a PDCA-based, 8- step Process Management approach **Figure P.2-2** that includes mapping and monitoring of processes and a 7-step Problem Solving **Figure 1.1-3** process used by PITs to determine

improvement needs. Opportunities for innovation are identified based on PIT Action Plan submission, participation in coalitions, user groups and conferences, the annual SCAN and SWOT analysis, and benchmarking. At the department level, results of these approaches are evaluated monthly. SL review the strategic action plans and progress monthly during SP meetings. The SL review utilizes the MSP system to identify performance trends and gaps to ensure performance measures are aligned with work processes and our strategic plan. Strategic Objective and action plan measures, which are incorporated in our BSCs, are reviewed and tracked for progress in step 4 of the SPP and during department/branch staff meetings and monthly SL meetings. Key measures are re-evaluated to determine the need for continued tracking or amending based on changing requirements. WCTC primarily collects data using various business applications shown in **Figure 4.1-1.** For example, key data collection sources include our Q-FLOW line-queuing. Q-FLOW tracks a customer's full service experience from the moment they enter an office until their transaction is completed, which provides wait and transaction cycle times. Our Contactual phone system provides call center statistics such as answer speed, on-hold times and abandon rate data. This data is used to determine web updates, on-hold messages and to make other system improvements. To create more seamless integration of data and to ease the availability and analysis of this data, we deployed an automated BSC system in 2010. This system provides an automated dispersal of key data to all who need it and provides easy analysis tools. When organizational measures are reviewed and updated in step 5 of the SPP, department/branch/unit measures are also updated to maintain alignment. Measures are also added, updated or deleted during the year as requirements change. Data collection and analysis drive our decision-making process for both strategic and day-to-day operations. The new BSC system provides us with additional analysis capability by providing predetermined analyses (such as Strategic Objectives not meeting target and root-cause analysis) to the desktops of managers and directors. Over the next several years our duties and service offerings are slated to expand. Due to proposed legislative mandates and local opportunities our office will have the ability to issue Florida birth certificates, issue concealed weapons permits, issue County business tax receipts and certification of official records.

2.2 Strategy Deployment
2.2a(1) Action Plan Development
Action plan development occurs during step 6 of the SPP. Once the strategic objectives and associated goals are identified, action plans are created by the SLT and departmental teams. All action plans are aligned with a

strategic objective and a priority level is established (**Figure 2.1-2**). Key short and long term action plans are listed in **Figure 2.1-2**.

2.2a(2) Action Plan Implementation
Action plans are developed for each Strategic Priority and deployed throughout the organization utilizing the MSP online system, and action plan document template. Through this system progress is tracked and performance measurements aligned with the strategic objectives. Action Plans are deployed to supplier and partners through meetings, conferences, email, telephone, and contract agreement discussions. Key outcomes of action items are sustained through monthly evaluation of performance measurement reports and progress reports.

2.2a(3) Resource Allocation
Financial and other resources are made available to support the accomplishment of action plans through the annual budgeting process and long-term strategic planning. Resources such as large capital acquisitions and branch renovations are identified during the SPP to support long-term action items. Financial budget and expenditure analyses are performed monthly to evaluate the utilization of financial resources ensuring availability of funds to support the accomplishment of key action items.

2.2a(4) Workforce Plans
Key human resource or workforce plans to accomplish our short and long term strategic objectives and action plans are identified and described in our strategic plan categorized under our Engaged & Empowered Workforce strategic priority. These plans include 1) increase employee engagement through a focus on development and employee recognition, 2) increase employee satisfaction through a focus on competitive compensation and benefit offerings as well as employee safety and, 3) increase employee training and development through cross-training and CFCA certification.

2.2a(5) Performance Measures
Key performance measures and indicators used to track the progress and effectiveness of action items can be found in **Figure 2.1-4**. Through the MSP online system, individual and departmental action plan measurements are aligned with organizational strategic objectives and priorities. This alignment with the organizational strategic priorities ensures that all key deployment areas and stakeholders are addressed and recognized.

2.2a(6) Action Plan Modification
Action plans are evaluated and modified if necessary during monthly operational and strategic reviews by the SLT. These reviews are used to determine current resource commitments and required resources for implementation of the modified plan. Mid-Cycle modifications are identified during the PDCA process; The MSP system is also utilized to ensure alignment of modified action plans with strategic objectives and goals across the organization.

2.2b Performance Projections
Our key performance projections that identify our short-term, mid-term, and long- term action planning are listed in **Figure 2.1-4.** Performance projections are determined and based on internal analysis focused on continual improvement comparing results within the organization and industry peer groups.

SLs constantly monitor performance to plan for any variations in projected performance compared to other comparable organizations, key benchmarks, goals, and past performances. Gaps in performance trigger performance improvement plans. Competitive comparatives are not applicable since WCTC has no key competitors.

Figure 2.1-1 Strategic Planning Process

Strategic Planning Process Steps	Contributors	Actions
1. (Re)Discover purpose	SLs	Review, reaffirm and/or revise MVV
2. Assess strategic position	All Staff	Environmental Scan, SWOT analysis
3. Develop Strategic priorities	SLs	Ensure alignment with MVV and core competencies, leverage advantages
4. Develop Objectives/Goals	All Staff	Establish BSC targets & performance projections
5. Align people and financial resources	SLs	Cost benefit analysis, organizational and staff alignment analysis
6. Execute plan	All Staff	Action plans, funding/budget, progress review, communicate

Figure 2.1-2 Goal, Objective, & Action Plan Prioritization

Goal & Objective Prioritization Matrix	
Level 1 (High Priority)	Critical, time sensitive. State mandate or other that will result in a threat to a core competency if not implemented timely.
Level 2 (Normal Priority)	Important, may be time sensitive. Core competency is affected if not implemented.
Level 3 (Low Priority)	Desired, less important and not time sensitive. Implementation will strengthen core competency.

Figure 2.1-3 Strategic Planning Improvements

Year	SPP Improvements
2005	• First Strategic Plan (aka - project list) developed • Began using project charters to track projects • Mission, Vision, Values developed by Chief Deputy TC
2006	• SPP Flowchart developed • Quarterly review and update meetings added to SPP • Action Plan tracker developed
2007	• Annual strategic planning meeting with SLs Mission, Vision, and Values developed • Measures, targets and objectives established in alignment with our MVV to address customer and employee needs • Expectations for our staff and processes developed in alignment with our values
2008	• SLT decided to adopt formal 4 step SPP • Comprehensive Environmental Scan • Core competencies reviewed annually • First SWOT conducted among SLs
2009	• Comprehensive Environmental Scan, SWOT by SL • Implemented monthly production meetings to review measures, targets and trends reported by al SLs and managers using a standardized agenda • Priorities formally documented • Core Competencies identified during annual meeting • Incorporated feedback and input from all stakeholders through various mechanisms into planning.
2010	• WCTC Vision Statement updated • Employee engagement in department actions plans • Automated scorecard system deployed • Vendor report cards scores used in SPP • Incorporated Cost Benefit/ROI Analysis into SPP • Developed BSCs for individual departments • SPP documents added to intranet • Refined project charter to current action plan template for ease of use and understanding by staff • Developed organizational BSC in alignment with our strategic plan and department BSCs • Implemented SWOT across all employee levels
2011	• Comprehensive Environmental Scan, SWOT by SLs and Supervisors • Employee Satisfaction Survey results utilized in SPP • Initiated internal/external survey redesign • Launched Yammer • Implemented vendor report card and satisfaction survey instruments
2012	• Updated core values and branding • Implemented BSC for measuring performance results • Implemented cultural pledge document for employees' acknowledgement, understanding, and commitment to our core values • SWOT Analysis with participation from supervisors/managers with input from all employees • PDCA Deployed • Organization wide Environmental Scan
2013	• Adopted a web based strategic planning system - MyStrategicPlan.com • Implemented a new and improved 6 step SPP • Sterling Explorer • GSA Application

Strategic Priorities, Key Indicators, Targets, Action Plans					
Strategic Priorities and Objectives	Indicators/Measures [Results]	Target	Projections FY 2014 / 2016		Short and Long Term Action Plan Examples and Assigned Priorities (L 1-3)
Customer Focused					
1. Enhance Customer Service	Public Customer Satisfaction [7.2-1]	95%	99% / 99%		1.1.2 Automate all internal forms for electronic submission by website (L2)
	Average Customer Wait Time [7.1-1]	5 min	4.5 min / 4.3 min		1.1.6 Design, develop and launch mobile application (L3)
	Calls Answered in less than 20 seconds [7.1-7]	85%	86% / 90%		1.1.9 Coordinate the refresh of DHSMV equiment (L1)
	Walk in Customers Waiting less than 5 minutes [7.1-6]	80%	82% / 85%		1.3.1 Enhance customer survey methods at all contact points (L2)
2. Increase Customer Base and Service Offerings	Customer Transactions Processed Annually [7.1-22]	160,000	162k / 165k		1.3.5 Conduct and host annual dealer class (L2)
	Messages Communicated to Public [7.4-1]	300	320 / 340		2.1.1 Establish after hours service delivery mechanisms (L2)
	Website Traffic (# of Visits) [7.2-6]	55,000	60k / 65k		2.1.3 Review implementation strategy of Business Tax Receipts (L2)
Accountablility & Accuracy					
3. Increase Revenues	Total Revenue (commissions and fees in millions) [7.5-8]	3.0	3.0 / 3.2		3.2.1 Monitor annual property value assesments and millage rate directives by taxing authorities to support and enhance revenue forecasting (L2)
	Revenue per FTE (in thousands) [7.5-9]	$94	$95 / $100		
4. Control Expenditures	Increase/Decrease in Budget [7.5-3]	≤5%	2.84% / 3%		4.1.1 Initiate budget process in May each year (L2)
	Expenditure to Revenue Ratio [7.5-4]	70%	70% / 70%		5.1.1 Complete monthly review and reconciliation of financial records (L2)
	Cost Per Branch Transaction [7.5-5]	$6.00	$5.50 / $5.00		
	Cost Per Mail Transaction [7.5-6]	$1.00	$.95 / $0.90		
	Cost Per E-Commerce Transaction [7.5-7]	$0.70	$.67 / $.65		
5. Meet and Exceed Regulatory Requirements	External Audit Findings [7.4-2]	0	0 / 0		
	Reportable Legal/Ethics Violations [7.4-4]	0	0 / 0		
	Distribution Compliance [7.4-6]	100%	100% / 100%		
Relentless Pursuit of Improvement					
6. Increase Productivity and Effectiveness	Transaction Accuracy [7.1-27]	99.80%	99.95% / 99.97%		6.1.1 Expand public and private sector benchmarking partners (L3)
	Transactions Per FTE [7.1-20]	5,600	5,800 / 6,000		6.1.2 Develop departmental BSC results measures (L3)
	% of Mail Payments Processed within 24 hours [7.1-14]	100%	100% / 100%		7.1.1 Advocate for and initiate routine meetings of Constitutional Officers (L2)
	% of E-Commerce PT Transactions [7.1-12]	6%	5.5% / 10%		7.2.1 Consider vendor relationships and adopt standard practices to demonstrate appreciation (L2)
	% of E-Commerce MV Transactions [7.1-9]	7%	6.6% / 10%		
7. Improve Relationships with Stakeholders, Partners, and Vendors	Partner Satisfaction [7.2-2]	95%	95% / 95%		8.1.1 Provide routine training and update bulletins related to fraud tactics (L3)
	Stakeholder Satisfaction [7.2-3]	95%	95% / 95%		8.1.4 Expand and enhance workplace health, safety, and sanitation initiatives (L2)
	Supplier Satisfaction [7.2-4]	95%	95% / 95%		
	Aggregate Vendor Report Card Score [7.2-5]	4.0	4.5 / 4.5		
8. Mitigate Risk	# of Reportable OSHA Violations [7.4-25]	0.0	0 / 0		
	Internal Controls Audit Findings [7.4-3]	0	0 / 0		
Engaged & Empowered Workforce					
9. Recruit, Hire, Train, and Retain Talent	Training Hours Per Employee [7.3-15]	50	50 / 50		9.1.1 Establish DL services training strategy for all new hires (L2)
	Education/Training $ Invested per Employee [7.3-16]	$500	$500 / $500		9.1.4 Expand in-house training delivery and lesson plan development (L2)
	Voluntary Turnover Rate [7.3-22]	<5%	0% / 0%		10.2.1 Promote wellness activities and initiatives (L3)
10. Increase Employee Engagement & Empowerment	Employee Satisfaction Survey Rating [7.3-1]	95%	95% / 95%		10.2.2 Promote employee benefits educational programs (L3)
	Employee Engagement Survey Rating [7.3-2]	95%	95% / 95%		10.3.1 Reveiew of Paid Time Off approach to leave accumulation and use (L3)
	Unscheduled Absenses in Hours [7.3-19]	400	400 / 380		10.4.1 Increase Supervisory level training in Performance Mnmt techniques (L2)
					10.4.2 Redesign of 360 Leadership Competency Assessment (L2)
					10.5.3 Expand and enahnce employee recognition opportunities (L2)

Figure 2.1-5 Key Factors in Determining Strategic Plan

Key Factors in Strategic Planning	Source Inputs		
Strengths, Weaknesses, Opportunities, and Threats	Customer Input; Customer Comments via Phones, Web Page, Facebook, and Comment Cards; Customer Satisfaction Data; Customer Complaint Data; Employee Input; Employee Engagement Survey; Employee Engagement PIT;	Employee Benefits Survey Data; 360 Group Meetings and Evaluation Results; Turn Over Rate; Employee Satisfaction Rate; Promotion Rate; Good to Great Meetings; Yammer	Production Meetings; Supplier Input; Supplier Satisfaction Survey Data; Partner Input; Partner Satisfaction Survey Data; Coalition/User Group Meetings; Sterling Explorer Feedback Report
Early Indicators of Major Shifts in Technology, Markets, Customer Preferences Competition or Regulatory Environment	Technology User Group Meetings Coalition Meetings Study of Best Practices Environmental Scans Opportunities Team Suggestions	Markets Customer Feedback Analysis SWOT Competition Comparative Data	Regulatory Environment Legislative Tracking Participation in FTC Legislative Committee Attendance at various conferences and professional/association affiliations
Long Term Sustainability	Onboarding Succession Planning and Training ICDP	Disaster Mitigation Plan Financial Management and Planning Process Mapping	Redundancy Legislative Lobbying
Ability to Execute Plans	Senior Leaders/Departmental Budget Ownership and Tracking Balance Score Card	Cost Analysis Legislative Tracking Lobbying	HR Needs Identified in Monthly SL Meetings

Customer Focus

3.1 Voice of the Customer
3.1a Customer Listening
3.1a(1) Listening to Current Customers
Customer focus is one of our four strategic priorities and is addressed each year during the SPP, and reviewed during monthly SL Operations and Strategy meetings. WCTC serves a diverse customer base through face-to-face assistance for our lobby customers, traditional phone and mail services, and on-line services for our web-based customers. **Figure 3.1-2** outlines key customers and the methods utilized to communicate and capture feedback.

Walk in customers have the option of using the main office located in DeFuniak Springs or the branch office located in Santa Rosa Beach. Both offices offer complete customer service through Property Tax Collections, Driver License Services, DMV services, and sales of Hunting and Fishing License. The WCTC has also made special accommodations for customers in remote locations to pay taxes face-to-face via our RATE program. Speedy service and proper lobby flow is accomplished by use of lobby cameras and our Q-flow customer queuing system. All walk-in customers have the opportunity to fill out our customer comment cards to rate the office on services provided. If comment cards are returned with negative comments immediate action is taken to review the situation, look for patterns, and contact the customer to obtain the best possible outcome. Walk in customers that do not have all necessary documents to process the transaction at hand are given check lists to insure they have all documents necessary for the return visit.

The WCTC uses technology in a variety of ways to listen to the customer. Our website offers a live chat so the customers can speak directly to a customer relations clerk. E-billing is now available for customers who prefer to receive tax bills electronically as opposed to mail. E-blasts are sent via Constant Contact giving our customers opportunities to receive email communications based on their interest by transaction and or service type. Social media is also used as a way to hear the voice of the customer. Our Facebook wall is open so customers can interact with our office with both positive and negative feedback and the comments are in full view of the community we serve. Google alerts are used to inform us when the WCTC office is mentioned on a public forum so we can respond appropriately.

The Customer Relations Department is designed to provide phone and mail service for the customers of the WCTC office. All Customer Relations Representatives are seasoned employees assuring proper experience in dealing with all aspects of customer inquiries. All customers who receive registration renewal cards are provided a comment card in which to rate the WCTC on meeting their expectations. As with all other customer comments, these are researched and immediate action is taken to resolve any issues in a timely and efficient manner. By offering multiple channels for feedback, WCTC provides the additional opportunity for pre and post-transaction feedback, or responses to questions throughout the customer service cycle.

3.1a(2) Listening to Potential Customers
By listening and focusing on one customer at the time and providing the best possible customer service, the WCTC office ensures that our former customers will return for future visits as well as encouraging others to utilize our services as opposed to those of surrounding tax collector offices. Our employees from SLs to front line team members are constantly looking for ways to serve our customers better. Q-flow reports are used to track customer wait time. Lobby cameras are used to insure proper call forwarding, safety, and efficient customer flow. Team members receive customer service training annually to ensure the best possible service is provided. Potential customers are engaged through public relations and marketing strategies that include traditional print, radio and mail media, as well as online and social media. Participation in community events, to include informational booths allows us to interact with many potential and current customers. Examples include the County Fair, Chamber Events, College Career Days, Cooking Shows, etc. Our community outreach to potential customers is further enhanced by our SL and employee participation in civic, non-profit and charitable organizations. The WCTC offers multiple channels of communication and feedback opportunities via web, mail, phone, and face to face to ensure that all customers past, present, and future are heard and served.

3.1b Determination of Customer Satisfaction and Engagement
3.1b(1) Satisfaction and Engagement
Customer satisfaction and engagement is determined by customer comments both written and verbal. Customers are given the opportunity to complete a customer satisfaction survey with each vehicle renewal that is processed. These surveys are embedded in the renewal instrument. The customers are poled on timely receipt of the renewal cards, clarity of the information on the renewal, as well as how the office is meeting the customer's expectations. Customers are also encouraged to write any additional comments they have about the office. These cards are collected by the Customer Relations Department who respond to the customers concerns. Comments captured from the comment cards

were utilized when the office redesigned the Registration Renewal Cards. In addition to the registration comment cards the customers are also given the opportunity to rate our walk-in service through comment cards provided at each clerk station. The comment cards allow customers to rate our service on the following transactions: Tag Renewal, Title Application, Property Taxes, Tangible Tax, Vessel Registration, Hunting/Fishing, and other transactions such as Driver License and ID cards. Customers are given the opportunity to express themselves on our Facebook page open format. We welcome customers' comments both positive and negative. In addition to phone calls and chats received by our Customer Relations Department, representatives from the office are available throughout the year at community events such as our RATE program, County Fair, Cooking Show, and College Career Day where customers are encouraged to share comments and thoughts on our daily operations. At this time the WCTC does not have a Customer Relations Management (CRM) product, however, this has been identified through our SPP as a strategic priority. We are in the process of searching for a CRM product that will meet our needs and capture the needs of our customer's while staying within our budgetary guidelines.

3.1b(2) Satisfaction Relative to Competitors
Due to the nature of our business the WCTC does not have any direct competitors for the services we offer. We utilize comparison data from other Tax Collector's Offices of similar size/service offerings that operate as agents of DOR. We partner with and utilize best practices of previous GSA winners as well as private industry such as Chick-fil-A, Zappos, and the City of Tallahassee to set our goals and create benchmarks for customer satisfaction.

3.1b(3) Dissatisfaction
As previously mentioned, customer dissatisfaction is captured through face to face contact, phone conversations, e-mails, letters, chats, Facebook comments, website responses, registration renewal comment cards, and counter comment cards. Any comments that express dissatisfaction are researched and handled at a department level. Customer service is one of the core competencies of the WCTC office and each complaint is looked at as an opportunity for improvement. The complaint is researched, examined for patterns, the customer is contacted and a satisfactory solution is obtained.

3.2 Customer Engagement
3.2a Product and Service Offerings and Customer Support
3.2a(1) Product and Service Offerings The WCTC identifies customer and market requirements for product and service offerings by focusing on the needs of our internal and external customers. These needs are

identified by feedback received through customer surveys, comment cards, social media interactions, emails, face-to-face conversations, and community interactions such as our RATE program. We identify and innovate product and service offerings to meet the requirements and exceed the expectations of our customer groups and market segments as part of our annual SPP and through community outreach, surveys, and listening to the needs and/or requests of our customers. The WCTC identifies and introduces innovation in our product and service offerings to new markets and customers through our strategic partnerships with state, federal, and local agencies; our benchmarking partners; and looking inside and outside of our industry for best practices successfully implemented. We are excited to offer a new service this tax year with the implementation of our first annual "Tax Tailgating Events". We have plans to offer curbside tax payment drop-off on important discount deadlines to save customer time and also utilize this opportunity to partner with a coat and food drive to help under privileged citizens.

3.2a(2) Customer Support The WCTC enables customers to seek information and support as well as provide feedback on our products, services, and customer care through the tools identified in **Figure 3.1-1.** These methods are also used as our key communication mechanisms to ensure that the WCTC is meeting our customers' key support requirements. We utilize press releases, email blasts, social media posts, word of mouth, informational insert mailings, and advertising opportunities to ensure customers are aware of regulatory changes to our processes. Internally, we utilize department meetings, "Good to Great" meetings, email and Yammer posts to notify employees of changes that will impact customers and service processes. Training classes are also deployed if need necessitates.

3.2a(3) Customer Segmentation The WCTC identifies current and future customer groups and market segments through our environmental scan, SWOT analysis, and SPP. Due to the nature of our business our customers seek our services due to legal requirements. We look for ways to make the customer experience exceptional by seeking new and innovative ways to provide our services. We identify partnering opportunities to improve the process. While our customers are required to utilize the services we provide, they are not required to utilize our office. We take additional steps to insure customer loyalty and satisfaction such as eliminating customer inconveniences by: providing telephones in our lobbies for customers to conduct business, offering to make calls for customers to speed up process and minimize miscommunication, providing title request services for out of state transfers, giving customer check lists to make sure our customers are prepared, communicating with other offices on behalf of

customers, providing drop off or pick up service for extenuating circumstances, and onsite VIN verifications upon request. Special programs such as the RATE program and semi-annual dealer training allow us to provide additional services to our customers to make transacting business with WCTC more convenient for the customer. Business growth and customer service expansion opportunities are identified through the Environment Scan and SWOT conducted during the SPP. Current opportunities identified on our SP include the printing and certification of Florida birth certificates, issuance of concealed weapons permits, issuance of County business tax receipts, and certification of official records.

3.2b Building Customer Relationships
3.2b(1) Relationship Management WCTC reinforces the importance of building and managing relationships with our customers through our annual SPP and through our MVV, **Figure 3.1-2**. Building relationships with customers starts from the first interaction with customers. Customer interactions occur through phone conversations, emails, Facebook conversations, mail correspondence, and face-to-face interactions. An opportunity for improvement in this area was recently identified and a project team is currently working on the development of service standards to emphasize how team members approach customer interactions to ensure consistent service and increase the opportunity to personally connect with each customer.

We also provide personalized customer service with efficiently trained employees that have a wealth of knowledge and experience as well as the latitude to make decisions to come to a win-win situation to better serve our customers. The WCTC consistently exceeds customers' expectations as evidenced in the results of our customer satisfaction surveys *(Result 7.2-1).*

Community events such as our RATE program as well as the semi-annual dealer training seminar provide face-to-face interaction with customers outside the office. These opportunities allow WCTC to engage customers in conversation and listen to any concerns or praises shared regarding services.

Community service projects are another way WCTC builds relationships with the public by showing we care about the community and give back.

Relationships and trust are also built by keeping customers informed. Public service announcements, media releases, blogs, informational phone recordings during hold patterns, mail inserts, and e-blasts all assist in ensuring the public is aware of changes that may impact them as well as

simply being knowledgeable about office initiatives or service offerings.

Social media has provided a great opportunity to communicate with the community the individual stories of customers who have touched WCTC. Facebook allows us to share information with customers immediately and without media filters. WCTC embraces the opportunity to interact and receive feedback from customers and allows customers to post directly to our Facebook wall rather than only allowing Facebook to serve as an outward communications vehicle. This open format allows customers to ask a question and it be answered publicly. Other customers have the benefit of seeing the answer to the question. Negative feedback received publicly is also addressed publicly. WCTC aims to take ownership of opportunities for improvement. Additionally, social media helps us connect with customers by sharing employee milestones, organizational celebrations, and personal stories.

The WCTC uses many aspects of social media to engage our customers, build new relationships, and strengthen existing relationships. A Constant Contact survey was used to ask customers where they went to renew their driver license before WCTC took on DL services to better understand the needs of our community. Email, Facebook, Twitter, Blogs, and Constant Contact are all utilized in sharing important messages and responding to the customers we serve.

3.2b(2) Complaint Management The WCTC manages customer complaints promptly and effectively through listening to the voice of the customer, feedback, social media interactions, customer comments, mail in surveys attached to registration renewal notices, face-to-face complaints and compliments, community interaction, and by observing customers' actions and demeanors. We listen to the customer, research the issue, and look for a win-win situation. Our Customer Relations department responds to all comment cards that note a specific situation or concern. At this time the WCTC does not have a CRM product however this has been identified through our SPP as a strategic priority. We are in the process of searching for a CRM product that will meet our needs and capture the needs of our customer's while staying within our budgetary guidelines. Team members are empowered to make decisions and adjustments based on customer needs without compromising integrity or legal requirements. Through a community partnership we offer free car wash tokens for customers that have been inconvenienced through no fault of their own to show appreciation for their continued confidence and to increase customer satisfaction and engagement. The WCTC is a continuous improvement organization and data from these

opportunities is used to research best practices and improve processes when allowed to do so and remain within compliance and meet all legal requirements and governmental regulations.

Figure 3.1-1 Customer Support Mechanisms

Customer Support Mechanisms
On-Line Chat
Community Outreach
Website
E-blast newsletters
Blog Postings
Comment Cards
Customer Service Department
Face-to-Face conversations
Social media
Local media outlets
Email
Telephone Calls

Figure 3.1-2 Customer Listening Methods

Key Customer Group	Department	Requirements	Communication & Feedback Methods	Results
PUBLIC Walton County Tax Payers, Walton County Tax Payers Association, Walton County Citizens Advisory Council, Motor vehicle/vessel/mobile homes/ driver license customers, Tax certificate investors, Hunters & Fisherman	Collections Services Compliance Services Customer Relations	• Prompt Service • Convenient Payment Methods • Convenient Locations	Comment Cards; surveys; e-mail; telephone; mail; website; WCTC blogs; Facebook; Twitter	• Public Customer Satisfaction Rating/Target 95% *(Results 7.2-1)* • Average Branch Wait Time/ Target < 5 min. *(Results 7.1-1)*
BUSINESS Escrow and title companies, Business owners, Motor Vehicle, Vessel and Mobile Home Dealers; Financial Institutions: Attorneys, Real Estate Companies	Collections Services Compliance Services Customer Relations Finance	• Accuracy • Efficiency	Comment Cards; surveys; e-mail; telephone; mail; workforce speaking events; website; WCTC blogs; Facebook; Twitter	• % of Transactions Accurately Processed/Target 100% *(Results 7.1-21)*
GOVERNMENT Taxing authorities, WCBCC, Special taxing districts; Municipalities, Walton County agencies, Law Enforcement Agencies	Collections Services Compliance Services Customer Relations Finance	• Compliance • Accuracy	Comment Cards; surveys; e-mail; telephone; mail; workforce speaking events; website; WCTC blogs; Facebook; Twitter	• % of PT Funds distributed as statutorily required/Target 100% *(Results 7.1-18)* • % of MV Funds distributed as statutorily required/Target 100% *(Results 7.1-19)*

Measurement, Analysis, and Knowledge Management

4.1 Measurement, Analysis, and Improvement of Organizational Performance
4.1a Performance Measurement
4.1a(1) Performance Measures

Data and information for tracking daily operations and overall organizational performance are selected through step four of the annual SPP, **Figure 2.1-1**. Efficiency, effectiveness, and outcome measures are selected based on their relevance to WCTC's vision, mission, priorities, goals, and objectives from our SP. The performance measures are based on our desired outcomes and priorities as defined in our SPP. Currently the data selected for measurement is related to four primary categories: 1) Customer Service, 2) Financial responsibility, 3) Work Process Improvement, and (4) Workforce Improvement. Inputs into the selection of data include legislative and regulatory changes, customer trends, best practices, emerging technologies, economic and financial trends, feedback from customers/partners/vendors/stakeholders and the workforce. WCTC's key organizational performance measures are listed in **Figure 2.1-4**.

Each department supervisor guides their team in the selection of appropriate data through department meetings. All performance collection, analysis, and reporting activities are managed by our Director of Finance who is the designated Performance Measures Coordinator. WCTC data is collected, aligned, and integrated through BSC designer software, and via MSP which is used throughout the organization as a repository for data and measures. Performance measures, both operational and strategic, are linked to an organizational goal, strategic objective, or action plan. All measures are reviewed monthly by SL. During bi-monthly strategy and operational review meetings SLs review and analyze data from the prior month. During monthly departmental meetings this data is shared and discussed with all team members. Also during our SL bi-monthly strategy and operational review meetings data and trends are tracked via our BSC. SLs have a review of ongoing and active action plans, PIT proposals, brainstorm initiatives, division briefings, goal reviews, organizational decision-making, and evaluation of and prioritization of new goals and objectives outlined in **Figure 2.1-2**.

The WCTC collects data manually and by using various business applications shown in **Figure 4.1-1**. Manual methods include direct observations, checklists, surveys, reports, and spreadsheets.

4.1a(2) Comparative Data

Within the Tax Collector industry, WCTC compares data with other Florida Tax Collectors. WCTC also compares data with designated benchmarking partners that include Hillsborough, Manatee, and Pinellas County Tax Collectors, all previous recipients of the Governor's Sterling Award. WCTC compares data and best practices with other government offices outside our industry as well as private sector organizations. Among the private sector partners are Zappos, Chick-fil-A, Publix, and Chelco (local electrical cooperative). We use a team approach to data gathering, through our Opportunity PIT. For example, after learning of Zappos legendary customer service and unique culture which has resulted in high levels of employee satisfaction and retention, we reached out. Zappos freely shared their resources and insight, which resulted in a PIT review of our entire recruitment, selection and hiring process.

4.1a(3) Customer Data

WCTC collects data for each customer interaction: walk-in, telephone, mail, social media, and website. We strive to deploy customer feedback instruments at all customers "touch points" to provide the opportunity to provide feedback on the services received. This data is integrated into BSC performance measures and reviewed during monthly SL and Department meetings. Results from gathered data are captured in our BSC and used to support strategic and organizational decisions and to detect opportunities for innovation.

4.1a(4) Measurement Agility

WCTC ensures that performance management systems are able to respond to rapid, unexpected, or externally driven changes by systematically analyzing data with the use of BSC and MSP. All data is reviewed for anomalies during bi-weekly during SL meetings. Monthly results are shared with departments through MSP and BSC and shared by supervisors with their teams. This allows WCTC to respond quickly and effectively when necessary to address identified needs such as training, personnel, revising goals and targets, and adopting new policies and measures.

4.1b Performance Analysis and Review

Organizational Performance and capabilities are reviewed on a regular basis through annual SL strategic planning sessions and monthly SL strategy and operational reviews. The BSC is utilized to review organizational performance measures, and Talent Management initiatives that include: ICDPs, Performance Improvement Planning, Training needs assessment, and technical competency surveys. If a measure is consistently falling short of the targeted goal, SL will use PDCA, **Figure 1.1-3,** to address the problem and find potential solutions. Key short term, mid-range, and long range goals and action plans are formulated

during the annual SPP and are reviewed for progress and revisions are made as necessary by the SLT.

4.1c Performance Improvement
4.1c(1) Best Practices
In support of our core value to "relentlessly pursue improvement in ourselves and our work", we are always in search of best practices in both the public and private sectors. Through our Opportunity Team, there is a targeted focus on the search for best practices. Resources used include publications, articles, web and social media, google keyword search, conferences, and meetings. At the SL level, WCTC shares best practices across organizational units and work processes through monthly meetings. This creates multiple and ongoing opportunities to share findings and collaborate. All employees participate in collaboration to include sharing best practices via our Yammer enterprise social media solution.

Significant organizational improvements have developed from this process. For example a request was made via Yammer for those with an interest or passion to join a team to look for new innovative ways to enhance our customer experience. As a result, those volunteers worked closely with directors, supervisors, and other team members to implement ways to WOW our customers on a daily basis. In addition, our best practices are shared openly on our public website and blog.

4.1c(2) Future Performance
WCTC uses performance review findings to project future performance through step 1 of the SPP "Assessing Our Current Position". The collection services department regularly reviews historical performance data, such as total transactions *(Result 7.1-22)*, wait times *(Result 7.1-1)*, transaction types *(Result 7.1-3 -7.1-5)*, using year to year comparison to project high lobby traffic trends on a daily, weekly, and monthly basis. A review of the data assists in allocation of human capital to include training and vacation schedules. For example, when making preparations to assume driver license services from DHSMV as mandated by the Florida Legislature, SLs used performance data combined with customer volume estimates from DHSMV and counties of similar population to project performance and impact on key WCTC measures such as wait time and customer flow. The results of this analysis were used to gain approval from DOR to hire additional team members and acquire equipment. Equivalent evaluations are executed prior to implementation of new products and services.

4.1c(3) Continuous Improvement and Innovation
It is the individual search for small ways to improve in our jobs that help WCTC achieve its long-term goals of departments and, collectively, of the organization. Goals for achieving quality within departments are destinations, and sometimes, it is the small improvements that each individual makes during their journey that helps the organization reach its goals. WCTC communicates the relentless pursuit of improvement in ourselves and our work as a core value. This value is further reinforced by a specific strategic priority, Relentless Pursuit of Improvement. Performance review findings are made available real-time, to all employees via our MSP solution. In addition, WCTC conducts monthly organizational performance reviews and translates these findings into priorities for continuous and breakthrough improvement and opportunities for innovation through systematic evaluation and improvement of key processes by the SLT. When key process measures do not meet or exceed expectations, the SLT uses the PIP, **Figure P.2-2,** to assemble PITs to analyze the results and develop recommended improvement strategies. Examples of interventions from action plans often include new or revised policies, procedures, or guidelines, formal or informal training and education, redesign or realignment of a work process(es) and staff, technology deployment, and/or financial resource re-allocation.

We deploy these priorities and opportunities to work units and functional-level department operations throughout the organization to enable effective support for their decision making through monthly SL Operational Review Meetings, monthly SL Strategy Meetings, Monthly Good to Great Meetings, weekly department team meetings, daily training sessions, Yammer social media posts, and other specialized training sessions as needed. Innovation and improvement initiatives are acknowledged and rewarded internally and publically. WCTC deploys priorities and opportunities to our suppliers and partners/collaborators to ensure organizational alignment through emails, letters, phone calls, meetings, conferences, participation in PITs, surveys, and at contract renewal, where applicable as identified.

4.2 Knowledge Management, Information, and Information Technology
4.2a Organizational Knowledge
4.2a(1) Knowledge Management
WCTC accomplishes the collection and transfer of workforce knowledge through multiple means. Documents, policy updates, reference manuals, and other important information accessible on our intranet as well as hardcopy, and new employees receive training on how to find and access these documents. All records are maintained and archived digitally in Docuware, which provides a record of key decisions, actions, correspondence, and discussions.

Organizational knowledge is also transferred through cross training, job shadowing, stretch assignment, mentoring, and employee work team transfers. New employees complete a comprehensive in-house training program in which employees are trained in all TC service areas. Employees are paired with a "Buddy"/mentor, who is responsible for helping new employees apply their newly acquired knowledge and skills. Mentors/buddies follow a standard checklist, ensuring that mentors/buddies in each office follow the same steps. The checklist is reviewed annually by Human Resources, Division Directors, and Supervisors to check for any necessary updates and ensure alignment with WCTC's goals, and individual technical skill development.

The transfer of relevant knowledge from and to customers occurs through multiple means of communication. Customers receive information directly from clerks, office signage, direct mail, website, blog, traditional media, social media, and e-newsletters. Each customer segment is able to leave feedback through a variety of portals, **Figure 3.2.1**, including comment cards, surveys, social media outlets, blogs, on-line chats, community outreach, and emails.

WCTC uses a combination of methods to achieve the rapid identification, sharing, and implementation of best practices available through posted literature, files on shared drive, intranet sites, Yammer enterprise social media, and routine meetings.

The organization's meeting system allows best practices to be shared at the weekly department and team meetings on Wednesdays of each week. WCTC uses the SPP and action plans to achieve the implementation of best practices. The assembly and transfer of relevant knowledge for use in the SPP occurs through annual SP sessions, organization-wide SWOT analysis, the use of MSP and BSC for performance data, and Sterling Business Model assessments. The assembly and transfer of relevant knowledge for use in innovation is achieved largely through cross-functional PITs.

For example, a team of employees from various departments created WCTC's awards and recognition system, one of their most successful efforts included recognizing all team members during Customer Service Week. An action plan was presented to SLs and approved unanimously that recommended theme days, prizes, contests, and surprise events such as an ice cream social given by SLs for all team members during the entire week. This resulted in a renewed team spirit and was a great lead in to our annual all-hands retreat.

4.2(a)2 Organizational Learning

Organizational learning is essential to WCTC's strategic priority – Relentless Pursuit of Improvement. An annual training budget is given to every team member **Figure 1.1-6 (Result 7.3-16)**. This is to be used for enrichment of leadership abilities and management skills in programs approved by supervisors and directors as well as technical training. WCTC's Talent Manager currently tracks all training with the use of the staff file system. This allows training records to be accessed by employee name, subject matter, or class type. Currently we are implementing a new talent management software, TalentEvo, which will enhance the ability to track employee development. The WCTC invests in the development of all team members by supporting participation in coalition meetings, attendance of conferences, and training with identified benchmarking partners such as Chick-Fil-A. All SLs have completed or are currently enrolled in The Florida State University's CPM course and other identified organizational leaders are slated to attend. Fifty-three percent of employees have completed CFCA (Certified Florida Collector's Assistant) training with plans in place for 100% participation in this Florida DOR certification course *(Result 7.3-17)*. Team members complete an ICDP which encourages them to set short, mid-range, and long term goals for their personal development. The ICDPs are used by team members and their supervisors to seek training opportunities to ensure that goals are met and also aid in succession planning.

4.2(b) Data, Information, and Information Technology
4.2b(1) Data and Information Properties
WCTC manages its organizational data, information, and knowledge to ensure accuracy, integrity and reliability, timeliness, and security and confidentiality through multiple methods described in **Figure 4.2-1**. The WCTC's IT Systems are maintained and updated through collaboration with the Clerk of Courts' MIS Department. The MIS team applies industry standards for hardware, software, interfaces and network protocols from a secure centralized location to assure alignment of Countywide IT functions. Critical applications are continuously updated through MIS, our suppliers and partners. Accuracy and integrity are further ensured though policy and processes that allow restricted user access or input of data. Systems have intuitive design, such as pull down menus and extensive security protocol to eliminate errors. IT security protocols provide access to in-house applications designated for various roles in each department. Each Director certifies the role and security access for every team member and approves any access level changes. Passwords are required to enter applications and users are required and prompted to change their passwords frequently. Confidentially statements related to sensitive data systems are also signed by all users.

4.2b(2) Data and Information Availability

WCTC uses a variety of tools to make data and information available to our work team through outlook email, MSP, Yammer Enterprise Social Media, Intranet site with access to data files and links to multiple internal and external data sources, **Figure 4.2-2**. Access is available 24/7/365 to include remote access sign on capabilities.

Both our main and branch offices use Q-Flow, a customer queuing system, and WCTC employees have real-time access to customer statistics, such as wait times and customers served. Supervisors and SLs use information from Q-Flow to allocate resources and employees to help WCTC meet its customer service goals.

Key information is made available to customers, as well as partners, suppliers, and collaborators, through a variety of tools. Critical information is delivered to customers of each channel: walk-in, electronic, telephone and mail. Information is relayed to walk-in customers through office signage, announcements on TV monitor displays, and face-to-face communication with clerks. Information is posted on WCTC's website, with prominent announcements. The website also includes up-to-date information on Walton County tax records, which customers can access at their convenience. WCTC also deploys e-newsletters and social media to communicate information to online customers and select customer sub-segments, such as tax certificate investors. WCTC also maintains a blog that provides information related to its continuous improvement initiatives and best practices.

For telephone customers, information is relayed through a comprehensive welcome message, which supplies key details such as office hours and the website address. Messaging is expanded for those instances when it is necessary to be on hold. Information is made available to mail customers through direct mail, including inserts and brochures.

WCTC also makes information available to suppliers, partners, and collaborators through regular user group meetings and meetings with other elected officials and county offices. WCTC shares its annual report and strategic plan, with suppliers, partners, and collaborators. In addition our IT infrastructure 1) maintains a public website averaging over 147,000 page visits per year, that was modernized in 2013 to include customer friendly navigation, social media connectivity, mobile accessibility, and customer engagement components, 2) provides a windows-based intranet serving an employee portal for information. The intranet houses procedure manuals,

policies, employee handbook, time and attendance system, links to commonly used forms and collaboration forums, 3) provides a voice and data communication system to handle transactions and respond to information, 4) supports the customer call center with a monthly average call volume of 3,996 calls, 5) Supports a high speed remittance processing system for motor vehicle, ad valorem tax, and non-ad valorem assessment payments, 6) Supports the accounting, budgeting, payroll, and purchasing functions in a single integrated system for financial reporting, payroll processing, and procurement processing.

4.2b(3) Hardware and Software Properties
WCTC ensures that hardware and software are reliable, secure, and user-friendly in a variety of ways documented in **Figure 4.2.1**. Network servers have redundant components, such as dual power supplies to ensure continued operations in case of hardware failure. Security of the technical infrastructure is also addressed through housing the main servers in dedicated and secure rooms with limited access and protected video surveillance and fire and intrusion alarms. Firewall devices are installed to prevent access to the internal network from the internet. The main technical components are inventoried annually along with other high value items and fixed asset audits. The annual financial audit also includes an IT financial security review.

4.2b(4) Emergency Availability
In the event of an emergency, WCTC's Natural Disaster Plan outlines technology shutdown and security procedures. If Walton County Emergency Management determines a major storm will impact the greater Walton County area, SLs will direct supervisors to activate the shutdown and security procedures. SLs review the WCTC Natural Disaster Plan at the end of every year *(Result 7.1-28)*, and any new objectives or suggested improvements are discussed at the annual SP session. In emergency situations, especially where offices are damaged or destroyed, WCTC will rely primarily on its website, local media and social media channels to communicate information regarding key services. To ensure the website will continue to run during and after a major storm, or any other emergency, the website is hosted on a server in a secure facility outside Florida. WCTC's critical information systems, including its tax database, are also hosted outside Florida, a decision SLs made to help mitigate natural disaster risks and ensure continuity of information and data.

Figure 4.1-1 Data Collection Applications

Data Collection Application Sources and Measures			
Type	**Collection Application**	**Sample Key Measure**	**Results**
Customer	Customer Comment Cards	Customer Satisfaction Rating	7.2-1
	Q-Flow	Wait Times	7.1-1
	PPS One Remittance Processing	% Mail Payment Processing	7.1-14, 7.1-15
	GovMax Processing Reports	% of Transactions by E-commerce	7.1-9, 7.1-12
	Supplier/Partner/Stakeholder Survey Reports	Satisfaction Ratings	7.2-2 - 7.2-4
Financial	Accounting/Budgeting System	% Budget Utilized	7.5-1
	Accounting/Budgeting System	Expenditure to Revenue Ratio	7.5-4
	Accounting/Budgeting System	Account Reconciliation	7.1-24
	Accounting/Payroll System	Payroll Errors	7.1-23
Operations	FRVIS	Transactions Processed	7.1-22, 7.1-20, 7.1-26
	FDLIS	Transactions Processed	
	MVP Tax System	Transactions Processed	
Workforce	Workforce Satisfaction Report	% Workforce Satisfied	7.3-1
	Workforce Engagement Report	% Workforce Engaged	7.3-2
	Accounting/Budgeting System	Education Funding per Team member	7.3-16
	iHR Timekeeping System	Team member absences	7.3-19

Figure 4.2-1 Management of Organizational Data & Information

Quality	Method	Data, Information, or Knowledge
Accuracy & Accountability	Internal audits	Data & Information
	External audits	Data, Information, & Knowledge
	End-of-day reporting & balancing	Data, Information, & Knowledge
	Call monitoring	Information & Knowledge
	Website review process	Information
	Tax roll conversion	Data
	Compliance measures	Data
Integrity & Reliability	Uniform Document System	Information & Knowledge
	ASE	Data, Information, & Knowledge
	Individual training budget per employee	Information & Knowledge
	Mentoring process	Information & Knowledge
	Daily server backups	Data
	Remote software hosting	Data
Timeliness	Q-Flow	Data & Information
	Complaint resolution system	Data, Information, & Knowledge
	Monthly measurement meetings	Data, Information, & Knowledge
	Monday Morning Updates	Information
	Meeting system	Data, Information, & Knowledge
	Website review process	Information
	TS service notifications	Information
	End-of-day audits/reports	Information & Knowledge
	Compliance measures	Data
Security & Confidentiality	Daily server backups	Data & Information
	Authorization for SharePoint files	Data, Information, & Knowledge
	Document shredding process	Data & Information
	Confidentiality agreements	Information
Quality	**Method**	**Hardware or Software**
Reliability	System Center Operations Manager (MOM)	Hardware
	DNS Made Easy	Hardware
	Help Desk software testing process	Software
	Hardware criteria checklist	Hardware
Security	Anti-virus software	Hardware / Software
	Security audits	Software
	Firewall	Software
	Network password requirements	Software
	Security cameras	Hardware
	Restricted access	Hardware
User-Friendly	Help Desk software testing process	Software
	Test environments	Hardware / Software
	Training	Hardware / Software

Figure 4.2-2 Data & Information Availability

Stakeholders	Data/Information Availability
Customers	Social Media, Web site, mail inserts, traditional media, telephone messages, e-blast, email, customer satisfaction surveys, fact-to-face communication, blog postings, brochures
Workforce	Yammer, Social media, email, internet, intranet, W:drive, telephone, face to face communication, employee engagement surveys, 360 assessment tools, bi-annual ICDP reviews, meetings, MyStrategicPlan.com, Q-Flow, blog postings
Suppliers/Partners	Vendor survey instruments, email, telephone, face to face interaction, vendor report cards, social media postings, blog postings, user group meetings, constitutional officer meetings

Workforce Focus

5.1 Workforce Environment
5.1a Workforce Capability & Capacity
5.1a(1) Capability & Capacity
WCTC assesses workforce capability and capacity needs through several methods identified in **Figure 5.1-1**. The WCTC Talent Manager determines capability needs through annual reviews of position descriptions. This supports alignment with core competencies, work processes, and the WCTC MVV. Our leadership roadmap outlines classifications, learning experiences, and course offerings needed to advance to the next level. In addressing capacity needs, data is issued from Q-Flow reports to show trends in customer levels. This has resulted in the reassignment of team members to meet the needs at our branch location and in our Customer Relations Department.

5.1a(2) New Workforce Members
WCTC recruits new members of the workforce through social media, published media, culture based/creative position announcements, employee outreach, internal postings, educational systems, and web postings. For hiring, the Talent Manager, along with the interview team, which consists of the department supervisor of the open position, a supervisor or assistant supervisor from separate organizational departments, and one other team member, conduct the interviews and make recommendations for candidate selection. New team members are placed according to organizational needs, however individual preferences are considered and internal transfer requests are honored when able. All new hires go through an extensive on-boarding process which includes: assigned buddy/mentor, first day welcome breakfast, cultural overview with SLs, individual meetings with the TC and other SLs, personality style inventory assessment, customer service training, HR overview of policies and benefits, and learning and leadership style assessments. The personality style inventory results are used to gain an understanding of team-mates preferences and behaviors. This is beneficial to supervisors when administering counseling and training. The results are also used when forming PITs to guarantee synergy. WCTC strives to retain new team members through ongoing training and development, competitive salary, availability and support of team leaders, ICDPs, and investing in workforce growth.

5.1a(3) Work Accomplishment
WCTC organizes and manages its workforce to accomplish the work of the organization through the SPP. SLs have organized WCTC to improve Customer Focus, Accountability & Accuracy, Relentless Pursuit of

Improvement, and Engaged & Empowered Workforce which are supported by our Finance, Talent Management, Operations, and Administration divisions.
WCTC organizes and manages the workforce to capitalize on core competencies through the SPP; SLs consider workforce needs, financial management, technology, and organizational structure to make necessary adjustments.
WCTC organizes and manages the workforce to reinforce a customer and business focus through the SPP and performance measurement system that includes cross functional teams, best practices, trend data, leadership developmental roadmap, and benchmarking. Customer service is a required training track for all team members that is incorporated into every team members' training. Customer service, knowledge, experience, and cultural fit are requirements of WCTC's hiring process, as they are key qualities.
WCTC organizes and manages the workforce to exceed performance expectations through individual goal-setting and performance data which is recognized with recognition and rewards at departmental and organizational level. Strategic challenges are addressed through objectives on the strategic plan. SLs are owners of objectives and responsible for working with the workforce, when appropriate, in the innovation and utilization of action plans, through planning, problem solving, and PITs.

5.1a(4) Workforce Change Management
The WCTC considers agility a core competency. One of our cultural values is to Embrace Challenges and Change. Changing capability and capacity needs are addressed through the SPP by employing environmental scans. This allows preparation in the form of project teams, workforce needs, communication strategies, and training programs. Team members are cross-trained and a staff-rotation has been utilized that ensures continuity, cohesion, and the sharing of institutional knowledge to guarantee continuation of specialized key work processes in the event of unanticipated circumstances.
When mandated by the Florida Legislature to provide driver license services, a project team was convened to guide the transition. Counties of similar size were contacted to identify benchmarking partners to determine staffing needs, office configurations, and equipment needs. Current team members were assigned to the local driver license office for stretch assignments to gain hands-on experience prior to the implementation. As a result SLs recognized the need for additional team members due to the anticipated amount of customer increase and a staff analysis was submitted to the Florida DOR for authorization of additional positions.

5.1b Workforce Climate
5.1b(1) Workplace Environment WCTC endeavors to
continually provide and improve health care, safety, and

security measures as outlined in **Figure 5.1-2.** Safety is addressed in a team environment, with facility inspections occurring quarterly. The Safety Action Team meets bi-monthly to review accident rates, consider new safety initiatives and best practices. Additional details of our workplace health, safety, and security approaches are defined in Category 6.2(c).

5.1b(2) Workforce Benefits and Policies
WCTC policies and benefits are designed to improve the work environment and the engagement of each of our team members through each phase of the employee lifecycle by providing a total rewards package and a fair, safe, and secure place of employment. Although WCTC employees work for an independent elected official, County Administration and the other Constitutional Officers serve as the benchmark for competitive benefits. WCTC collaborates with the Board of County Commissioners and other Constitutional Officers on benefits that are advantageous to our employees. In WCTC specific benefit offerings, such as the Sick Leave Incentive program and reduced premium Family Coverage; WCTC is able to act alone to offer better benefits. WCTC's Talent Manager serves on an insurance and benefits task force that collaborates with all county offices to research, identify, and secure benefit offerings are competitive. Employee satisfaction with these benefits is measured in our annual employee engagement survey. Examples of WCTC benefits are shown in **Figure 5.1-3.**

5.2 Workforce Engagement
5.2a Workforce Performance
5.2a(1) Elements of Engagement
Workforce engagement, organizational culture, and performance management are considered high priority action items at the WCTC. We recognize that an engaged and satisfied workforce performs at the top level. We also recognize and focus on the obligation for engagement of 1) the organization and it's SLT, 2) co-worker towards co-worker, and 3) each individual team member's responsibility for their own engagement. Our approach seeks to address the responsibility of these three distinct entities. An annual workforce engagement survey is offered to all team members and the results are utilized in our SPP, **Figure 5.1-4.**

5.2a(2) Organizational Culture Our organizational culture and values are non-negotiable. It is a shared set of beliefs we have agreed upon that defines who we are as individuals and who we are as a work family. While we've agreed to these as an organization, we live these as individuals each time we represent the office and hopefully they are adopted beyond the walls of our office and beyond our work hours, **Figure 5.1-4.**

5.2a(3) Performance Management WCTC position descriptions, which thoroughly identify the essential functions and job expectations, are the foundation of our performance management. Through the use of our ICDP's, which are conducted bi-annually, coupled with the 360 review, and proficiency ratings, which are conducted annually, our team members and their supervisors are able to target growth and development opportunities. When/if area(s) of improvement are identified the supervisor will place a team member on a Performance Improvement Plan, developing strategies and time lines to remediate the deficiency. Strategic priorities are incorporated into all of our performance management philosophies, **Figure 5.1-4.**

5.2b Assessment of Workforce Engagement
5.2b(1) Assessment of Engagement
Workforce engagement is assessed annually through a formal survey, *(Result 7.3-2)*. The survey incorporates the 12 elements of engagement developed by Gallup determined to be the best indicators of employee and workgroup performance. Additional questions are included in the survey strategically grouped to assess the workforce perceptions of feedback, teamwork, opportunities, fairness, and respect among others, *(Result 7.3-3 – 7.3-14).* Other indicators used to assess and improve workforce engagement include unscheduled absences, *(Results 7.3-19)*, voluntary turnover, *(Results 7.3-22)* and documented grievances, *(Results 7.3-21)*.

5.2b(2) Correlation with Business Results
WCTC relates findings from its assessment of workforce engagement to key business results by reviewing and analyzing year end results. Opportunities for improvement in workforce engagement and business results are identified during this review and action items are developed during step 2 of the annual SPP.

5.2c Workforce and Leader Development
5.2c(1) Learning and Development System
Through the creation of a positive learning environment our team members are encouraged to develop and enhance their knowledge, skills, and abilities. This is accomplished with a management by objective process in which our team members at all levels determine and set goals for themselves based on the overall goals and objectives for the organization. These are cataloged in the team member's ICDP. Training and development are very important to the WCTC and training efforts have been rewarded by producing a highly skilled and engaged workforce with much of our team members being fully cross-trained in all of Collection Services functions as well as many of the services through the Customer Relations and Compliance Services departments. These skills are measured through the Proficiency Rating tool which the

manager will use to assess the team member's level of skill in relationship to their position description. Another training component utilized is the "Leadership Development Roadmap" which spans all levels within our organization beginning from "Managing Yourself" through "Leading the Organization" outlining the core competencies for each level with a suggested learning experience and course option. Opportunities for development are also available through special projects, step up opportunities, and stretch assignments. High performance and life-long learning expectations are communicated from the onboarding process through the entire career of our team members.

Through the SPP, areas of improvement are identified by conducting internal and external environmental scans and are addressed by assessing and deploying training needs and methodology identified, learning and innovation are put into motion through researching best practices and technology and measures are tracked through the BSC. Ethics and our Code of Conduct are major components of how we, as a government entity, conduct our business. This is regulated through a formal policy and also through the development of a cultural environment, in which we work by an agreed upon set of "traits". This process begins at onboarding, **Figure 5.1-5,** and is a required high liability annual review training component. Customer Focus is the essence of what we do. Be it external customers, vendors, or our own internal customers we strive to provide the best customer service possible whether it is provided by face-to-face contact, electronic, or phone interaction. Customer Service training is provided to each of our team members during the onboarding process and is a daily expectation. We value the opinions of our external customers and offer communication for feedback through social media, surveys, website, and comment cards; vendors through an annual satisfaction survey; and the workforce through the annual engagement survey and benefit survey. We feel we have much to learn from our customers and embrace the opportunity to hear from them on a regular basis. Encouraging team members to create their own ICDPs aligns each team member's goals with the overall organization plans and goals as well as departmental goals. During this process managers make team members aware of executive level objectives and discuss how the department will support those objectives and how they as an individual contributor can also formulate their goals in alignment with the organization to further their career development. Once the goals are identified an action to accomplish the goals is documented as well as a success factor and resources needed. Each team member is allotted an annual budget to pursue identified

training/development objectives outlined in the ICDP. Transfer of knowledge is an ongoing process at WCTC. Much effort is placed on this process and accomplished through job rotation, on-the-job training, procedures/manuals, and process mapping to ensure the processes of the office will continue. Transfer of knowledge from retiring workers is captured by allowing a transition period in which the incumbent mentors, trains, and coaches the predecessor in all aspects of the position. For our new front line team members, the initial job knowledge and skills are obtained during the first six weeks and reinforced through classroom learning, hands on application, and testing. An assessment of the team member's performance is made at the six month period. Ongoing reinforcement at all levels is obtained through the accomplishment of goals documented in the team member's ICDP, certification testing, coaching and various on-going training events.

5.2c(2) Learning and Development Effectiveness
The WCTC evaluates the effectiveness and efficiency of our learning and development systems by monitoring trend data such as clerk error reports that help identify training needs, BSC results, workforce satisfaction surveys, conducting in-house training, customer satisfaction surveys, documenting technical proficiencies, and tracking ICDP goals and progress towards achieving those goals. The WCTC provides an individual training budget that allows and encourages team members to seek development opportunities. New hire trainees for front line positions are tested to assess their comprehension of the materials presented. On-going learning is applied when applicable and results are measured by error reduction, skill level proficiency, and overall workforce satisfaction. Classroom attendees for all in-house training evaluate the training course for relevance of information and to offer feedback to the trainer. Team members attending courses/seminars external to our organization are asked to write a synopsis of the training and explain how it will be applied and benefit their career development and to share their experience with their team members.

5.2c(3) Career Progression
The WCTC has a systematic succession planning process in place that identifies internal capabilities for meeting future staffing needs. The process includes identifying key positions and incumbents through an analysis of planned retirement and potential turnover; evaluate the bench strength by identifying potential team members; incorporate leadership development strategies into the ICDP of identified team members; and when necessary consider external resources for specialized skills.

Figure 5.1-1 Workforce Capability and Capacity Needs

Workforce Capability	Workforce Capacity/Staffing Levels
- Performance Measures - Proficiency Ratings 360 surveys - Position Descriptions - Engagement Survey Results - Training Needs analysis - BSC Measures - Communication	- SPP/Staffing Analysis - Communication - Industry Comparison thru DOR - Succession Planning - Workforce Surveys (*Results 7.3-2, 7.3-14*) - Transactions per FTE (*Results 7.1-20*) - Customer Wait Times (*Results 7.1-1*)

Figure 5.1-2 Workplace Health, Safety, & Security

Workplace Environment	Health, Safety, & Security	
Health	- Supervisors are CPR Trained - Team members trained in protocols for documenting/reporting employee and/or public incidents and workers compensation events as well as near miss incidents - OSHA tracking	- Team members are encouraged to participate in county held wellness programs (annual health screenings, workout center) - Team members are trained on robbery, safety, security, first aide, fire, bomb threat, disaster and emergency protocols - Ensure ADA compliance for workforce and public (ex: ergonomics, office access)
Safety	- Drug Testing – pre-employment and employee accident - Background checks - Driver's License checks - Fingerprinting	- Annual Hurricane emergency contact list update - Employer owned vehicle inspections and servicing - Cell phone usage in vehicles
Security	- Electronic Key entry - Photo ID - Reducing cash liabilities - Cameras	- Panic Buttons - On-site security - Armored vehicle pickup for cash deposits

Figure 5.1-3 Benefits & Policies

	Workplace Policies & Benefits	
Policies	• <u>Diversity</u> – EEOC; Veterans Preference; Culture Document/Pledge • <u>Engagement</u> – Onboarding; Ethics; Employee Conduct; Compensation & Classification; Employee Handbook; Intranet, Mentoring; Flexible Work Schedule; Remote Work Agreement; Certification Special Pay(CFCA, CPM, CPA, CGFO, SHRM); Workforce Engagement Survey; Benefit Survey; Employee Fund; Awards (Service, Employee of Quarter/Year); Annual Retreat; Sick Leave Incentive; Personal Holiday; Direct Deposit	• <u>Safety</u> – Harassment Policy; Grievance Policy; Whistleblower; Drug Free Workplace; Cashiering Procedures • <u>Performance & Development</u> – Appraisals; Performance Improvement Plan; Training Budget; Leadership Development; ICDP; Succession Planning; Course Offerings (Leadership Walton; BUILD; CPM, DOR) attendance in conferences/seminars/coalitions
Benefits	• <u>Health</u> – Workers Compensation; Health Insurance (100% employer paid for individuals and 50% employer paid for employees portion of family coverage); FMLA, Sick Leave Pool, Sick Leave Donation; annual open enrollment; cafeteria plan; benefits survey; Long Term Disability 100% employer paid • <u>Retirement</u> – FRS; deferred compensation	• <u>Leave</u> - Sick leave; annual leave - tiered to reward longevity: 0 – 5 years = 13 days annually, 5 – 8 years = 16.25 days annually, 8+ years = 20.02 days annually; 12 holidays including one personal holiday; bereavement; jury; mentoring; military; maternity • <u>Ancillary Insurances</u> – life; dental; vision; accident; cancer; hospital indemnity

Figure 5.1-4 Workforce Performance

Workforce Engagement	(1)Elements of Engagement	(2)Organizational Culture	(3)Performance Management
Environmental issues such as safety, cleanliness, and ergonomics	X		
Job Classification	X		
Compensation	X		X
Learning and Self Development (ICDP)	X	X	X
Relationships	X		
Policy and Procedure	X	X	X
Annual Retreat	X	X	
Career Advancement Opportunities	X		
Training/Certification/OTJ Job Shadowing/ Conf.	X		X
Manageable workload expectations	X		X
Workforce Engagement Surveys	X	X	X
Compensation Study	X		X
Road Map/Personal Budget for Training	X		X
PIT	X	X	X
Strategic Workforce Planning	X		X
Position Descriptions	X		X
Open Honest Feedback	X	X	X
Communication	X	X	X
Meetings :Good to Great , Supervisors, Assistant Supervisors, SL	X	X	X
Formal Cultural Doc.		X	
Onboarding		X	
SL Involvement	X	X	X
Comm. Involvement		X	
Benchmarking/Best practices		X	
Employee Award/Rec.	X	X	X
Mentor		X	
Proficiency Rating		X	
Organizational Alignment		X	
Customer Feedback			X
Performance Improvement Plan			X

Figure 5.1-5 Onboarding - "Great Beginnings"

Facilitator	Onboarding Topic
Senior Leadership Team	Mission, Vision, Values; Strategic Priorities; Overview of Operations, Administration, and Finance Divisions
Talent Manager	Overview of culture, benefits, key policies & procedures, administrative process
Buddy/Mentor	Tour of facilities, obtain security access, introductions to other departments/offices/agencies
Supervisor	Communication, leadership style, decision processes, expectations and performance standards, performance evaluations, performance improvement plans, Individual Career Development Plans
Training Coordinator	Review job specific training curriculum and performance standards, customer service training, learning style assessment, leadership style assessment, personality profile, ethics, classroom and on-the-job training
Team	Review of procedures and process regarding: safety, robbery, emergencies, disaster, security, first aide, employee fund activities, community involvement, and charities

Operations Focus

6.1 Work Processes
6.1a Product, Service and Process Design
6.1a(1) Design Concepts

WCTC services and work processes are designed and continually evaluated to ensure they meet key requirements by utilizing the 8-step PDCA Process Management Approach, **Figure P.2-2**. For example, in anticipation of providing the services of Business Tax Receipt issuance in Walton County, WCTC assembled a team to evaluate and determine the best approach to design and implement this new service. During this process, key requirements were identified and a preliminary flowchart was created. The incorporation of new technology (such as online transaction processing and paperless processing), utilization of organizational knowledge through best practice benchmarking, service excellence, and the need for agility are all factors considered during the team driven PDCA process.

6.1a(2) Product, Service and Process Requirements

WCTC determines key service requirements and work process requirements through myriad methods. Florida statutes, DHSMV, and DOR provide mandated requirements of services and processes through laws and regulations. Potential legislative changes impacting these requirements are monitored and considered during the SPP and throughout the year during bi-weekly SP review meetings. Key service requirements are also determined through feedback tools such as customer comment cards and surveys to gain insight into what matters most to customers and stakeholders when delivering key services. WCTC's work systems including key services and work processes and their requirements can be found in **Figure 6.1-1.**

6.1b Process Management
6.1b(1) Process Implementation

Key process performance measures in MSP include in-process measures, ensuring that WCTC's day-to-day operations meet key process requirements. For example, branch offices use a customer queuing system (Q-Flow) to manage and collect data of customer traffic. Real-time data collected by Q-Flow includes customer wait times, number of transactions, type of transactions, and cycle times. Key performance indicators and measures used to control and improve work processes are identified in **Figure 6.1-1.** End-service quality and performance indicators such as, Transaction Accuracy *(Result 7.1-21)* and Transactions per FTE *(Result 7.1-20)* are reviewed with work process measures to identify correlations and work process improvements.

6.1b(2) Support Processes

Key support processes are defined as those that provide value adding support to key service processes and are listed in **Figure 6.1-1.** The day-to-day operation of support processes incorporate performance tracking measurements to ensure key business support requirements are met. Some support process measurements include Number of Payroll Processing Errors, *(Result 7.1-23),* and Fund Distribution Compliance, *(Result 7.4-6).*

6.1b(3) Product/Service and Process Improvement

Several methods are utilized by WCTC to improve work processes. The primary methods used include the 7-step PDCA Problem Solving Approach, **Figure 1.1-3,** and the 8-step PDCA Process Management Approach, **Figure P.2-2**. The PDCA approach is team driven with the use of PITs and utilizes cause-and-effect analyses, process mapping and review of historical data. One recent example of a key process improvement made was the streamlining or our tax distribution process. Using a team approach, the process was mapped and steps where analyzed with a cause-and-effect Fishbone diagram to identify inefficiencies and develop improved steps. The result was a dramatically reduced processing time allowing WCTC to more rapidly meet the requirements of key stakeholders.

6.2 Operational Effectiveness
6.2a Cost Control

WCTC controls the overall costs of its operations through the strategic/operational and budgeting planning systems. Strategic objective 4, "Control Expenditures" contains organizational goals and measures allowing WCTC to monitor and control work system costs. These measures include: annual budget growth, *(Result 7.5-2),* cost per transaction, *(Results 7.5-5, 7.5-6, 7.5-7),* and expenditure-to-revenue ratio, *(Result 7.5-1).* Depending on the measure, results are evaluated monthly, quarterly or annually directly from the MSP system. To ensure cost control for new initiatives or projects, senior leaders complete a Cost-Benefit Analysis (CBA) for all non-mandated action plans with an estimated cost greater than $10,000 as part of the SPP, **Figure 2.1-1.** WCTC recently utilized this tool when evaluating a proposed equipment and software upgrade to the high-speed processing system. The analysis revealed a cost savings of over $65,000 over the following 5 years which far exceeded the initial investment cost. Cost estimates are compared against current budget allocations and resource commitments.

Efficiency and effectiveness factors are incorporated in WCTC's work processes in a variety of ways. Processing cycle times, such as Transaction Cycle Times and Mail Payment Processing Time, *(Result 7.1-14),* are captured and evaluated to measure efficiency. While Transaction Processing Errors, *(Result 7.1-21),* are evaluated for work process effectiveness and are used to assist in the process

of preventing future errors. Using the 7-Step Problem Solving Approach, **Figure 1.1-3,** customer transaction errors are evaluated to determine root causes and to develop and implement solutions to eliminate the occurrence of future similar errors reducing customers' productivity losses. The costs of inspections, tests, and audits are minimized through the use of systematic checklist processes. These checklists provide specific guidelines and requirements providing a smooth efficient audit process. While the importance of cost control is recognized by WCTC, specifically through the Strategic Perspective of Accountability and Accuracy, the need to reduce costs is balanced with the needs of customers. For example, when the state of Florida mandated that all Tax Collectors take over the issuance of Driver Licenses and Identification cards, WCTC had to weigh the balance of meeting customer requirements by increasing staff to accommodate the increase in customer traffic with the cost of additions to the workforce. This was accomplished through a careful analysis determining the additional cost that could be absorbed contrasted with the required increase to the workforce necessary to meet customer needs. Our efforts resulted in the successful smooth integration of driver license services in both branch offices, without any decrease in customer satisfaction, maintaining or exceeding our previous customer service goals, and minimal increases in our personal services budget.

6.2b Supply-Chain Management

The supply-chain of WCTC is managed through a process of inventory monitoring and constant communication with suppliers by phone, email, web, and contract to ensure that requirements are clearly understood allowing WCTC to receive the supplies and services necessary to meet customer needs. Inventories of operating supplies at each branch location are continually monitored to ensure sufficient quantities are available as needed. DHSMV supplied inventory such as registration decals, titles, plates, driver licenses, and identification cards are monitored through an automated system alerting suppliers of the need for additions to inventory on hand. When selecting a potential supplier, WCTC strives to ensure the supplier is qualified and capable of enhancing performance and customer satisfaction. Supplier proposals are reviewed by SLs to ensure products or services meet requirements and proposed pricing is appropriate. Reference checks are often initiated to confirm the suppliers' reputation and if necessary, a site visit is scheduled for further verification. WCTC utilizes a Vendor/Supplier Report card process, **(Results 7.2.2-7.2.5),** to measure and evaluate supplier performance annually. WCTC team members are encouraged to complete an evaluation form for all suppliers they communicate with or have experience with handling the products or services provided. The evaluation forms are condensed into a single page report for each

supplier which is then delivered to the supplier for review and response if necessary. The feedback provided in the report card often provides suggestions on how the supplier can improve their products or services. Poorly performing suppliers are informed of their position and if no effort to correct the performance is made, WCTC will consider a new supplier. For example, our credit/debit card processing vendor was changed in 2009 after requests to lower the convenience fees being charged to our customers, and our need to provide for customized transaction reports were ignored. The result was the selection of our current vendor partner CSI who immediately lowered the convenience fee from 2.9% to 2.5% and lowered it again in 2013 to 2.3%. Transaction reports were customized and value was added to both our customers and internal work processes.

6.2c. Safety and Emergency Preparedness
6.2c(1) Safety - Workplace safety and sanitation is addressed with a team approach, via our Safety Action Team (SAT). A designated Safety Coordinator leads a cross-functional team that includes both branches in daily and monthly facility inspections for both safety and sanitation. The team is also the communication channel for employees regarding concerns, recommendations, and a source for current safety bulletins and training. The SAT reviews all incidents of accidents or inspection concerns and reports monthly to the SLT. The SAT coordinates First Aid and CPR certification training and currently 10% of our workforce is certified in First Aid, CPR, and Blood Born Pathogen Awareness. CPR is refreshed every two years, First Aid every two years which includes Blood Born Pathogen Awareness. The team assures that Safety and evacuation plans are deployed and updated at each branch office. Office doors can only be entered by use of employee identification cards that are swiped and movement is tracked by these cards at the bailiff stations. Each branch is equipped with 24 hour video surveillance strategically located both internally and externally. Footage from the surveillance cameras is monitored at courthouse bailiff stations and in the call center. The footage is recorded and kept to meet the required retention period in order to be compliant with public records laws. Employee safety is also reinforced by the courthouse bailiffs who check each person entering the building with a metal detector. Bailiffs have a presence in the parking lots as employees enter and leave the building each day. Social media outlets are utilized during emergency situations to keep the public apprised of our operating status. Group emails are sent to employees anytime that any threatening weather situations are occurring and to inform them of potential weather or other emergency situations which could impact them on their way to and from work. In the event of an emergency situation, pre-determined procedures address the security of our driver license, tag and title inventory. WCTC's critical information systems,

including its tax database, are hosted outside Florida, a decision that was made to help mitigate natural disaster risks and ensure continuity of information and data.

6.2c(2) Emergency Preparedness - WCTC has an emergency plan in place that provides employees clear direction during critical emergency situations. This emergency plan is available to employees on our intranet and is reviewed annually. Emergency plans for fire, bomb threats, suspicious mail, hurricanes, active shooter in the building, and train derailment are each addressed. Pre-planning is conducted and evacuation routes are clearly posted in and around the office for fire situations. Smoke detectors and fire extinguishers are functional and accessible. Fire drills are conducted in conjunction with the courthouse bailiffs.

Bomb threat procedures are in place to deal with threats whether they are received by telephone, mail, written note or verbally communicated. Panic alarms are present and functional at each workstation. Employees are trained on the use of these alarms and are tested monthly by the Sheriff's Department personnel. All employees participate in Robbery Awareness training at on-boarding and annually thereafter. In conjunction with the courthouse bailiffs, a special alarm is in place in the event of a shooter in the building. A predetermined relocation point has been identified for employees to evacuate to during a shooter in the building event. Hurricane plans and procedures are in place and reviewed and updated annually each March. An employee contact list is updated to include current contact information and information on where that employee may evacuate to during a hurricane event. Hurricane drive-away kits have been created with items necessary to conduct business in the aftermath of a hurricane. A Continuity of Operations Plan is in effect with a predetermined alternate location to set up business in the event that the current building is damaged. Evacuation routes are part of the hurricane plan and a section on necessary steps that the employees need to take before, during and after a hurricane for their personal residences is included. Employee contact lists can also be utilized for other emergency situations such as a pandemic flu outbreak. Due to the home office proximity to the railroad tracks, a plan is in place to deal with chemical spills that could occur as a result of a train derailment.

In addition, the plan documents steps to take to prevent or minimize equipment/records damage, ensure data systems are properly backed up, establishes direction and control responsibilities in order to properly manage pre-and post-disaster activities, and defines the steps WCTC will take in the recovery process.

6.2d. Innovation Management

Innovation is accomplished and managed through a variety of processes. Innovation is managed through our annual SPP through Environmental scanning, SWOT analysis, accomplishment of our Strategic Priorities, the associated performance measures and goals for each, the use of cross-functional PITs, use of comparative data, monthly Operational Performance Reviews, and utilizing our Performance Improvement Process (PIP). These efforts aim to guide and direct the design, execution, and evaluation of our performance improvement activities and work systems.

We also have a designated PIT known as the Opportunity Team. This Team continuously searches for best practices and recognized performance initiatives in both the public and private sectors across the globe. This approach is reinforced by our fourth Core Value of Embrace Challenges and Change and our fifth Core Value to Relentlessly Pursue Improvement in ourselves and in our work. Strategic opportunities determined to be intelligent risks are reviewed by the SLT and an action plan is assigned to a specific department director or a PIT to pursue. Action plans guide the process of establishing timelines, resources, responsible parties, and desired outcomes and goals. The required financial and other resources to pursue opportunities deemed intelligent risks are made available through the annual SPP.

This funding is then included in the annual budget submission to DOR. Through SLs' continuous review of strategic objectives and goals during monthly SP meetings, opportunities can be discontinued as necessary to enhance support for higher-priority opportunities.

Figure 6.1-1 Key Services and Work Processes

WCTC Key Services and Work Processes				
Strategic Priorities/Perspectives (C.A.R.E.)				
1. **C**ustomer Focused 2. **A**ccountability & Accuracy 3. **R**elentless Pursuit of Improvement 4. **E**ngaged & Empowered Workforce				
Core Competencies				
1. Customer Service　　3. Information Sharing 2. Financial Management　4. Technological Innovation 5. Agility				
Work Systems				
Delivery of Key Services				
Department	**Work Processes**	**Requirements**	**Process Indicators**	**Results**
Compliance Services	Tax Collection E-Commerce High Speed Processing Business Tax Receipts	High quality services delivered with people who CARE; Compliance with all legal and legislative requirements	Customer, Partner, & Stakeholder Satisfaction Accuracy Customer Wait Times Regulatory & Legal Compliance	**7.1-9 - 7.1-15, 7.1-18 - 7.1-19**
Collection Services	Tax Collection MV Titling & Registration DL Issuance Game License Issuance			**7.1-1 - 7.1-6, 7.1-8, 7.1-11, 7.1-21, 7.1-22**
Customer Relations	Call Center Social Media E-Blast On-Line Chat			**7.1-7, 7.2-1, 7.2-6, 7.2-7**
Finance	Budget Distributions			**7.1-16 - 7.1-19, 7.1-23 - 7.1-24**
Talent Management	Hiring, Onboarding, Team Engagement & Development			**7.1-23, 7.3-1 -7.3-25**
Delivery of Support Services				
Department	**Support Processes**	**Requirements**	**Process Indicators**	**Results**
Finance	Accounts Payable, Accounts Receivable, Payroll, BSC	Compliance with all legal and legislative requirements; Accuracy; Professionalism	Audits, Regulatory & Legal Compliance	**7.4-2, 7.4-3, 7.5-1-10**
Talent Management	Workforce Hiring, On-Boarding, Engagement & Development	Safe, secure work environment; growth and development opportunities; benefits; performance management	Workplace safety; Training Completion; Satisfaction ratings; Engagement	**7.3-1 - 7.3-25**
Senior Leaders	Leadership Strategic Planning	Effective; efficient; visionary	Overall success of Organization; Achievement of Goals; Budget Utilization	**7.4-1-17**

Category 7 Results

The primary source of comparative data is derived from WCTC peer groups comprised of previous GSA recipients, Hillsborough County Tax Collector, Manatee County Tax Collector, and Pinellas County Tax Collector. Comparisons identified by "TC GSA Recipient" indicate the most current positive result achieved by this group. Annual results are based on WCTC's fiscal year beginning October 1 and ending September 30.

7.1 Product, Service and Process Results

Result 7.1-1: Captures the average length of time customers must wait to receive services at branch locations. The capture of customer wait time began in March of 2012 along with the state mandated implementation of driver license services.
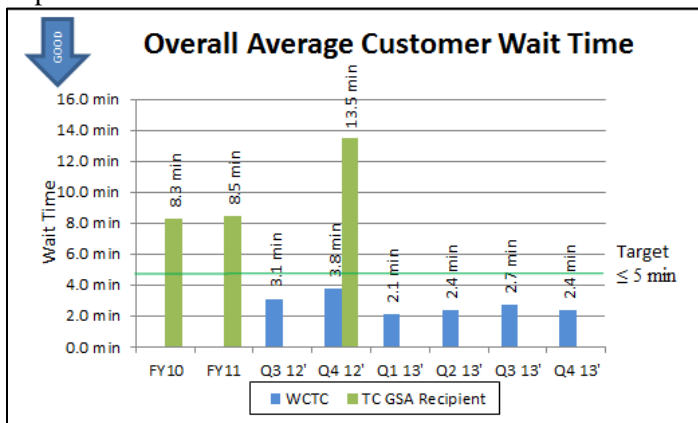
Result 7.1-2: Shows the average customer wait time by WCTC branch location.
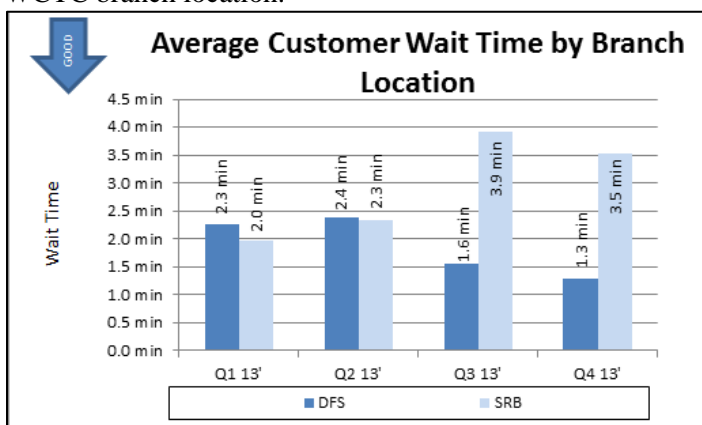
Result 7.1-3: The average customer wait time for motor vehicle services measures the average length of time customers must wait to receive services at branch locations.
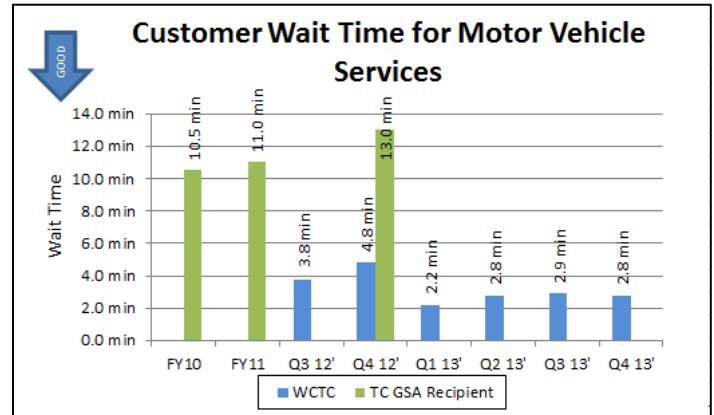
Result 7.1-4: The average customer wait time for driver license services measures the average length of time customers must wait to receive services at branch locations.
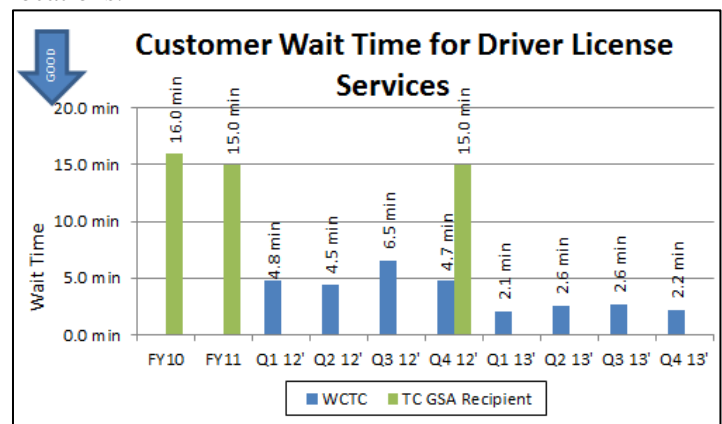
Result 7.1-5: The average customer wait time for tax payment services measures the average length of time customers must wait to receive services at branch locations.
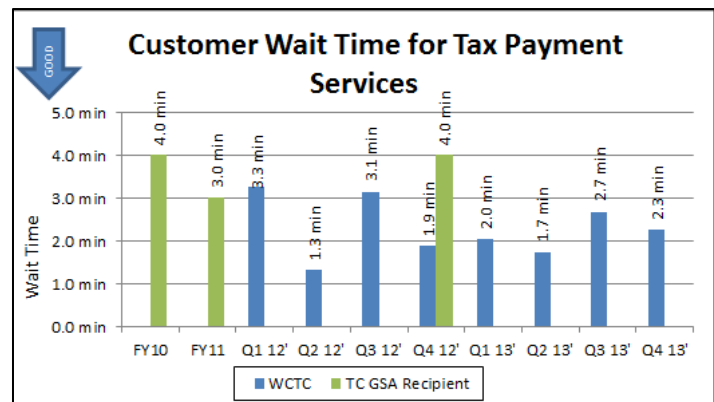
Result 7.1-6: The percentage of walk-in customers waiting less than 5 minutes to receive service.

Result 7.1-7: The percentage of calls answered in less than 20 seconds.

Result 7.1-8: Demonstrates the reduction in the percentage of motor vehicle transactions processed in person over the last five fiscal years.

Result 7.1-9: Demonstrates the increase in the percentage of motor vehicle transactions processed through cost effective online means.

Result 7.1-10: Demonstrates the increasing trend of the percentage of motor vehicle transactions processed from payments accepted through the mail.
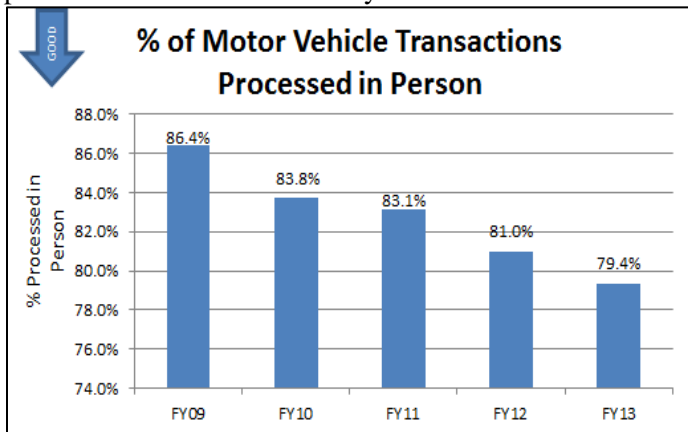
Result 7.1-11: Captures the percentage of property tax transactions processed from payments accepted in person at our branch locations.
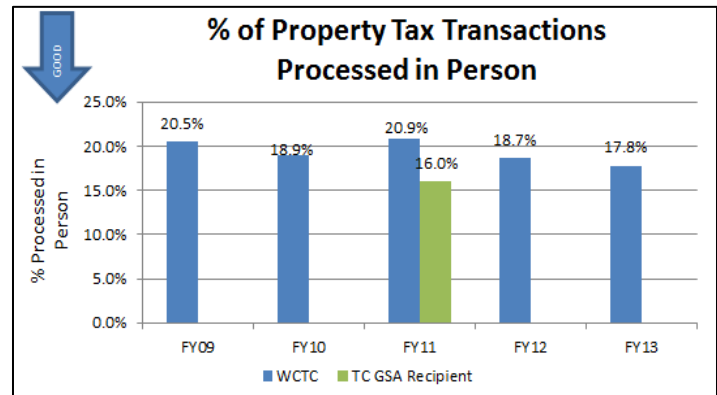
Result 7.1-12: Captures the percentage of property tax transactions processed through cost effective online means.

Result 7.1-13: Captures the percentage of property tax transactions processed from payments accepted through the mail.

Result 7.1-14: Shows the percentage of tax payments arriving through the mail that are processed within 24 hours of receiving them.

Result 7.1-15: Shows the percentage of motor vehicle payments arriving through the mail that are processed within 24 hours of receiving them.

Work Process and Supply-Chain Management Results

Result 7.1-16: Shows the timeliness of payments issued for overpayment and other refunds.
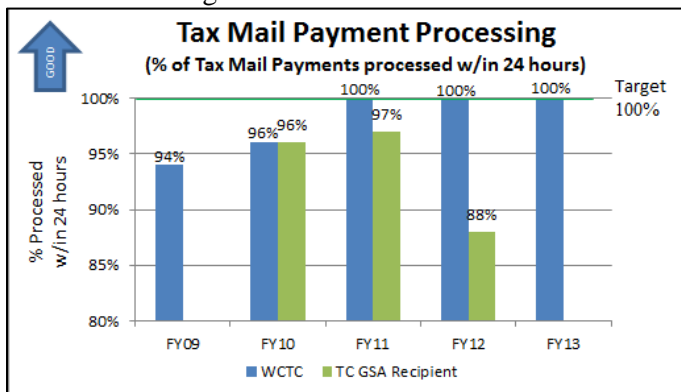
Result 7.1-17: Shows the timeliness of payments issued for invoices.
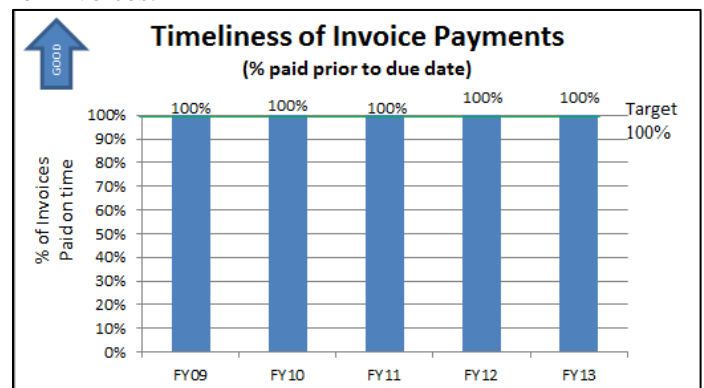
Result 7.1-18: Captures the percent of property tax dollars collected that were distributed on time within the statutory requirements.
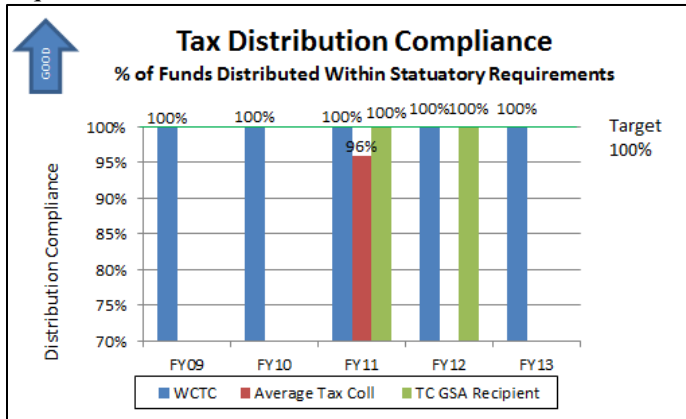
Result 7.1-19: Captures the percent of motor vehicle dollars collected that were distributed on time within the statutory requirements.
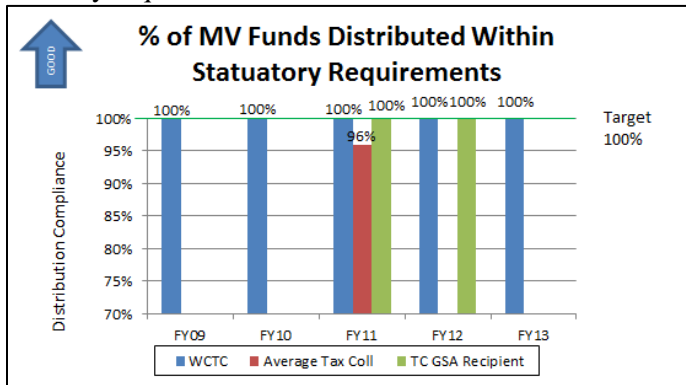
Result 7.1-20: Shows the increasing number of annual transactions processed for each WCTC employee.
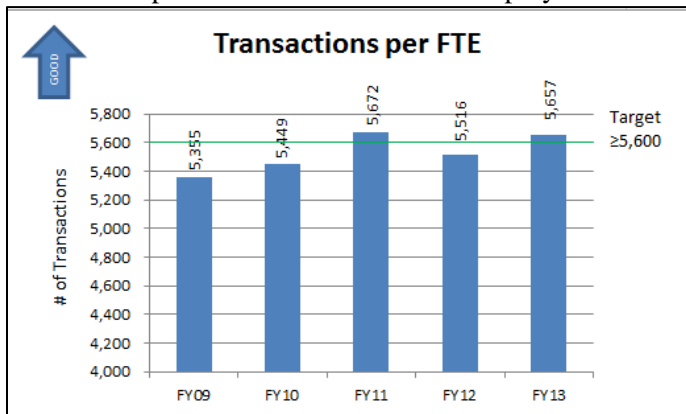
Result 7.1-21: Shows the percentage of transactions that have been accurately processed.
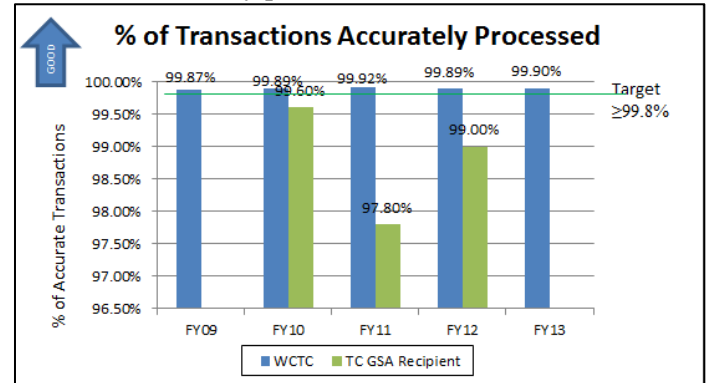
Result 7.1-22: Shows the increasing number of total annual transactions processed.
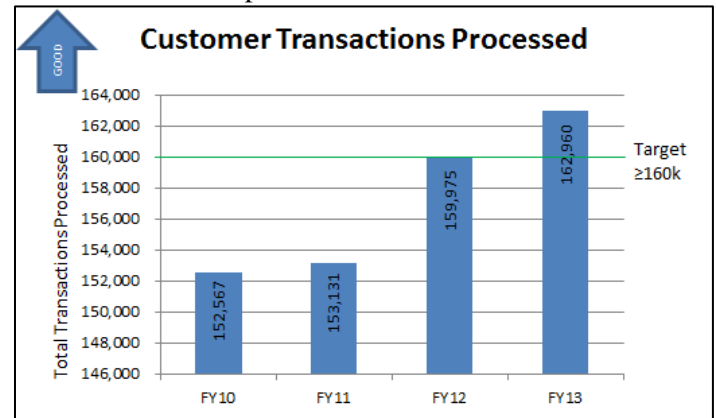
Result 7.1-23: Demonstrates our commitment to achieving zero payroll errors during each fiscal year.

Payroll Errors				
FY10	FY11	FY12	FY13	Target
0	0	0	0	0

Result 7.1-24: Demonstrates our commitment to see that all funds received are accounted for and reconciled to the penny each monthly period end and fiscal year end.

Bank Account/General Ledger Reconciliation Variance				
FY10	FY11	FY12	FY13	Target
$0.00	$0.00	$0.00	$0.00	$0.00

Result 7.1-25: Shows the percentage of the total tax roll that was collected and distributed during each fiscal year.

Result 7.1-26: Captures the percentage of payroll reporting that was processed and submitted on time.

Result 7.1-27: Shows the average number of days required to collect funds on returned items.

Result 7.1-28: Demonstrates WCTC's desire to annually review and update the emergency preparedness plan.

7.2 Customer-Focused Results

Result 7.2-1: Displays the results of our customer comment cards with responses ranging from "Excellent" to "Good".
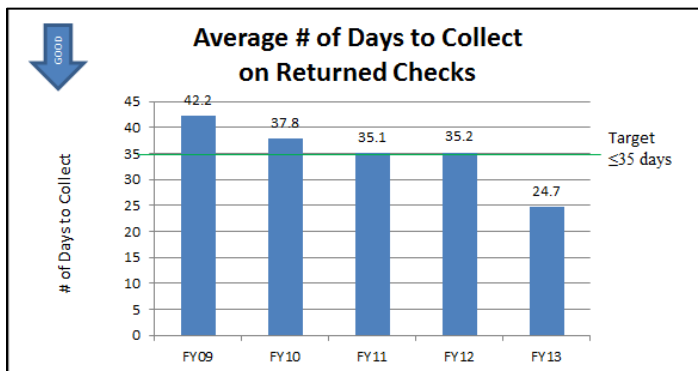
Result 7.2-2 – 7.2-5: Shows the results of our satisfaction survey ratings among our partners, stakeholders, and suppliers. The vendor report card score is an internal evaluation and feedback tool for key suppliers.

Partner/Supplier/Stakeholder Satisfaction				
Result #	Measure	FY12	FY13	Target
7.2-2	Partner Satisfaction Rating (% Rated Good to Excellent)	100%	97%	95%
7.2-3	Stakeholder Satisfaction Rating (% Rated Good to Excellent)	91%	100%	95%
7.2-4	Supplier Satisfaction Rating (% Rated Good to Very Good)	94%	100%	95%
7.2-5	Aggregate Vendor Report Card Score	4.26	4.5	4.0

Result 7.2-6: Captures the number of visitors to WCTC's website. Customers regularly utilize the site throughout the year and visits have increased by 14% over the last two years.
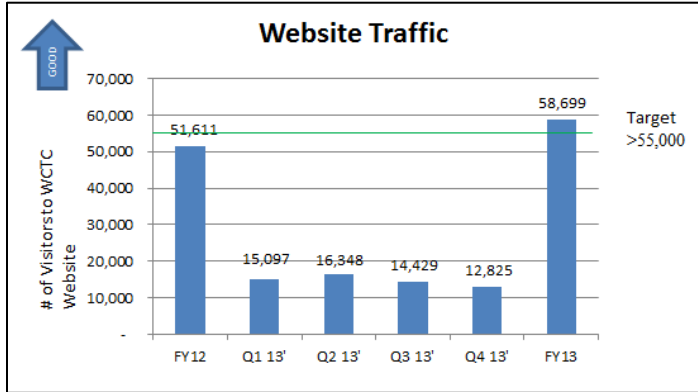
Result 7.2-7: Displays the number of times Facebook postings by WCTC were shared by others. This measurement demonstrates customer engagement in WCTC activity.
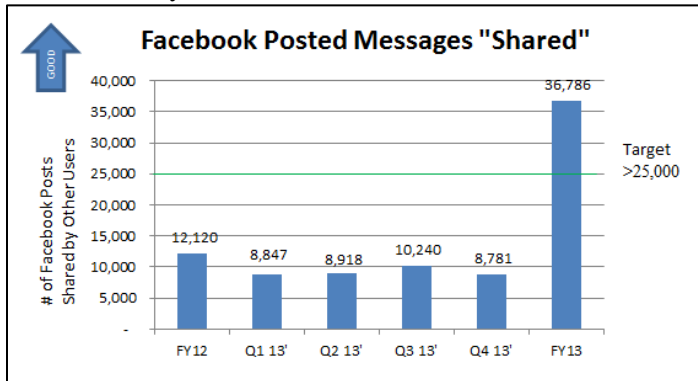
7.3 Workforce-Focused Results

Result 7.3-1: Displays our employee satisfaction results for the last four fiscal years. The most recent results were gathered from an expanded survey intended to capture responses for a wider range of questions organized in 12 categories the results for which are captured in results 7.3-2 through results 7.3-14.
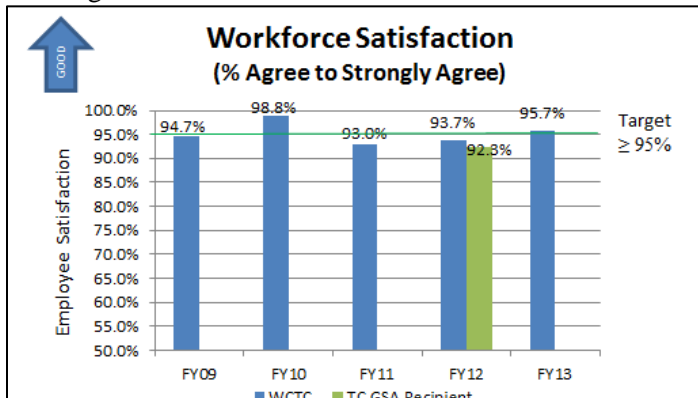
Result 7.3-2 – 7.3-14: Workforce survey results. Workforce engagement is comparable to previous GSA recipients with 96% engagement levels.

Workforce Survey Results (% Agree to Strongly Agree)				
Result #	Measure	FY12	FY13	Target
7.3-2	Workforce Engagement	93.2%	95.7%	95.0%
7.3-3	Perception of Feedback	88.0%	93.1%	95.0%
7.3-4	Perception of Teamwork	93.0%	96.6%	95.0%
7.3-5	Perception of Quality and Custor	94.0%	97.1%	95.0%
7.3-6	Perception of Mission and Purpo	97.8%	97.1%	95.0%
7.3-7	Perception of Workplace and Res	95.5%	94.8%	95.0%
7.3-8	Perception of Communication	87.1%	95.6%	95.0%
7.3-9	Perception of Opportunities for G	96.9%	95.0%	95.0%
7.3-10	Perception of Work/Life Balance	93.7%	94.7%	95.0%
7.3-11	Perception of Fairness	86.5%	94.3%	95.0%
7.3-12	Perception of Respect for Manag	94.4%	97.8%	95.0%
7.3-13	Perception of Respect for Employ	98.7%	98.5%	95.0%
7.3-14	Perception of Personal Expressic	88.3%	94.6%	95.0%

Result 7.3-15: Shows the number of training hours each employee received over the last four fiscal years. The increase in training hours for FY12 is due to the required training by DOR for issuing driver licenses which began in March of 2012.
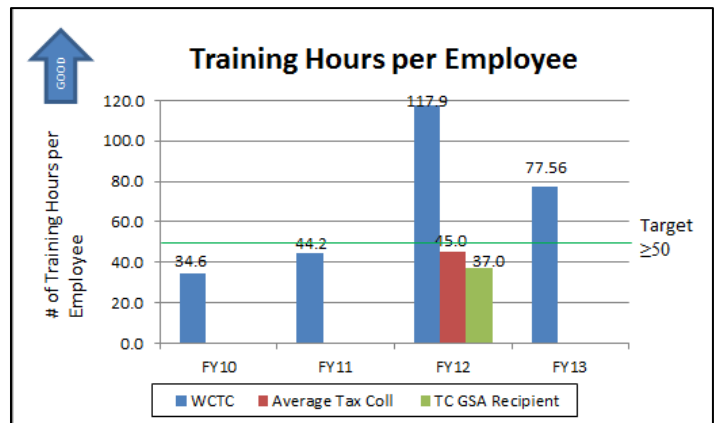
Result 7.3-16: Shows the amount of money invested in employee education per FTE. FY13 increase is due requests by several individuals to participate in additional training that exceeded their individual budget.
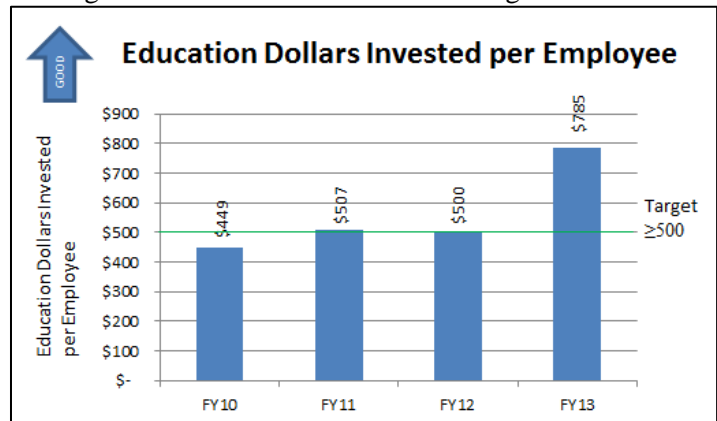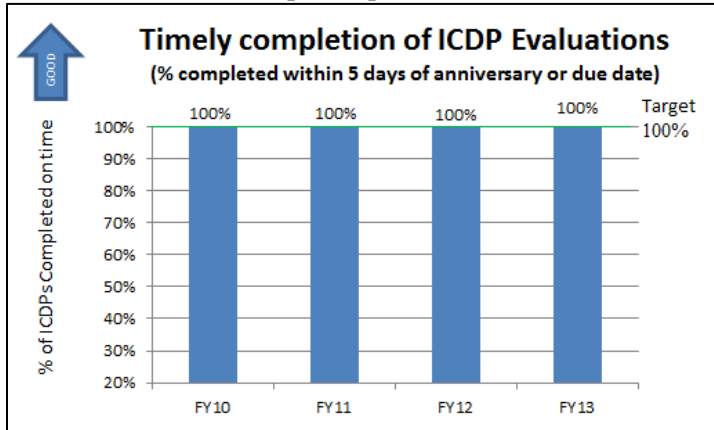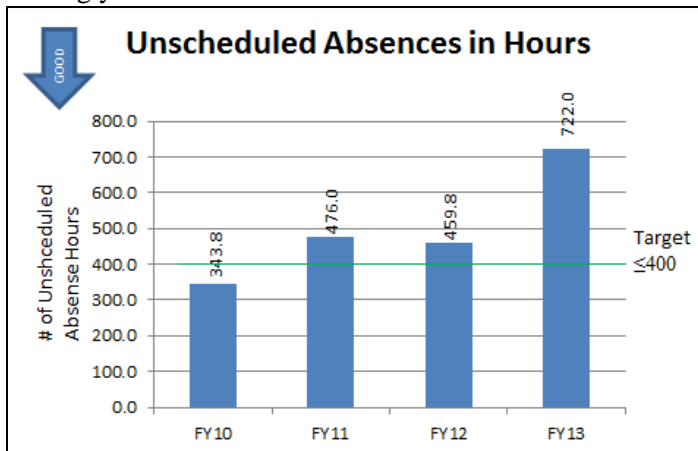
Result 7.3-17: Shows the percent of workforce that has obtained the certification of Florida Collectors Assistance awarded by the Florida Department of Revenue.
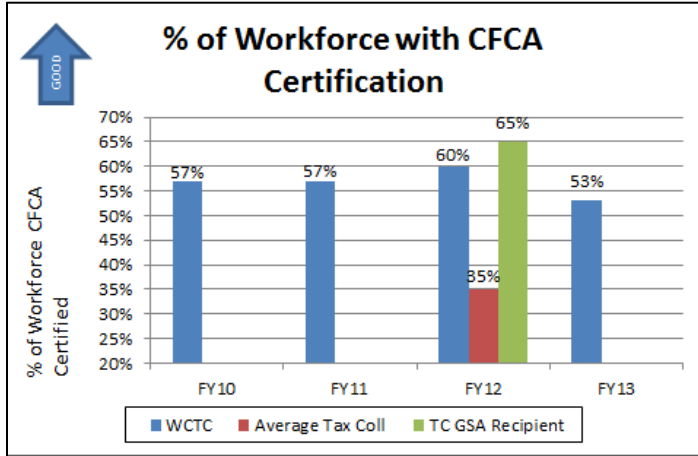

Result 7.3-18: Displays the timely completion of individual career development plan reviews.

Result 7.3-19: Displays the total number of unscheduled absences annually. The increase in hours for FY13 is associated with a higher than normal number of births during the year and the required time to be with family. This number is anticipated to decrease to normal levels in coming years.

Result 7.3-20: Shows the percent of staff that signed and submitted the annual policy review receipt.
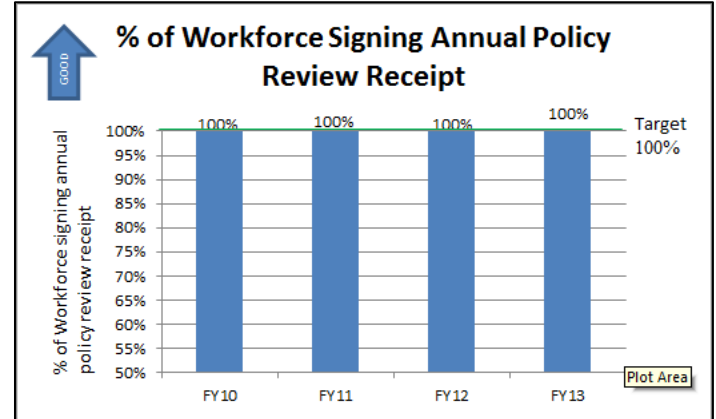
Result 7.3-21 – 7.3-25: Displays the results of a number of our workforce focused outcomes over the previous four fiscal years

Workforce Focused Outcomes						
Result #	Measure	FY10	FY11	FY12	FY13	Target
7.3-21	Employee Grievances	0	1	0	0	0
7.3-22	Employee Turnover	7.1%	0.0%	0.0%	6.25%	0.0%
7.3-23	EEOC Labor relation complaints	0	0	0	0	0
7.3-24	Worker's Compensation Claims	0	0	1	0	0
7.3-25	# of OSHA Reportable Injuries	0	0	0	0	0

7.4 Leadership and Governance Results

Result 7.4-1: Demonstrates our full compliance with FS 197.282 regarding the distribution of property taxes collected.
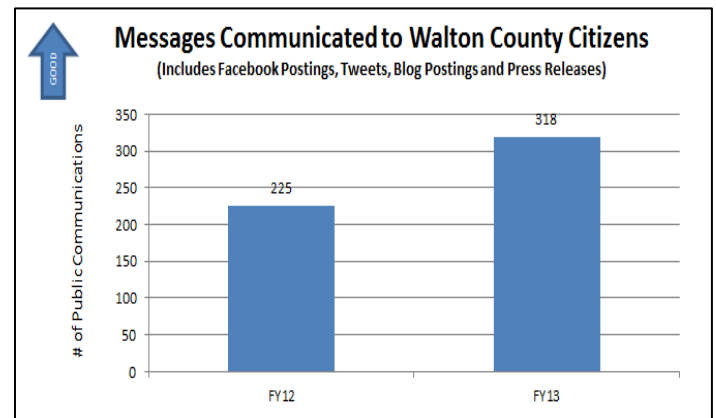
Result 7.4-2 – 7.4-5: Displays the results of WCTC governance and ethics leadership outcomes over the previous five fiscal years.

| Leadership Outcomes						
Result #	Measure	FY09	FY10	FY11	FY12	FY13	Target
7.4-2	External Audit Findings	0	0	0	0	0	0
7.4-3	Internal Audit Control Findings	0	0	0	0	0	0
7.4-4	Reportable Legal/Ethics Violations	0	0	0	0	0	0
7.4-5	License Plate Inventory Management (# of Unaccounted for Items)	0	0	0	0	0	0

Result 7.4-6: Demonstrates our consistent commitment to comply with FS 197.282 regarding the distribution of property taxes collected.
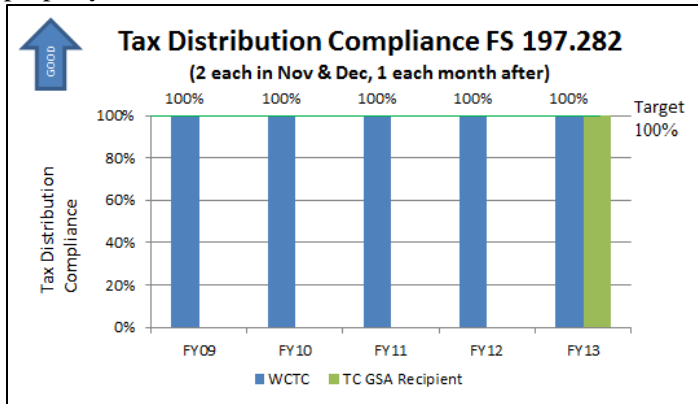

Result 7.4-7 – 7.4-12: Displays the results of WCTC regulatory compliance outcomes over the previous three fiscal years.

Leadership Outcomes - Regulatory Compliance					
Result #	Measure	FL Statute	FY11	FY12	FY13
7.4-7	County Commission Advance Request	197.383	100%	100%	100%
7.4-8	IRS Form 1099 Mailings	n/a	100%	100%	100%
7.4-9	Budget Submission to DOR	195.087	100%	100%	100%
7.4-10	Distribution of Excess Fees	218.36(2)	100%	100%	100%
7.4-11	Advertising of Tax Roll Opening	197.322(2)	100%	100%	100%
7.4-12	Tax Notice Mailings	197.322(3)	100%	100%	100%

Result 7.4-13: Shows the results of our annual fixed asset audit. 100% of WCTC assets were accounted for in each of the last five audits.
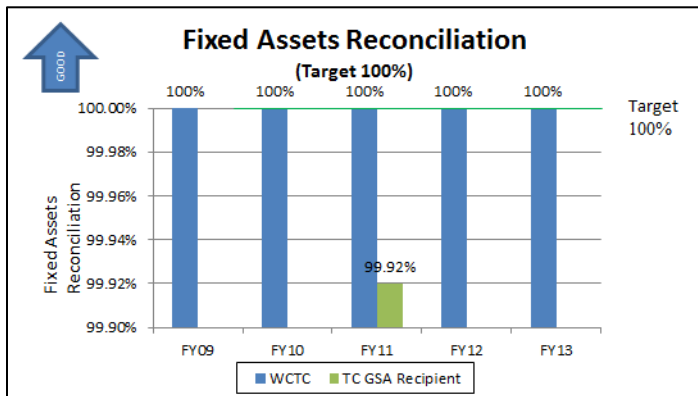
Result 7.4-14: Shows the charitable fundraiser dollars collected by the WCTC Employees Fund to support Walton County communities and others. The organizations supported by these funds include the Boys and Girls Club of the Emerald Coast, Emerald Coast Children's Advocacy Center, American Heart Association, St. Jude Children's Hospital, and ARC. Fundraising efforts have declined in recent years due to the increased workload and focus of implementing driver license services and is anticipated to increase in FY14 and each year after.
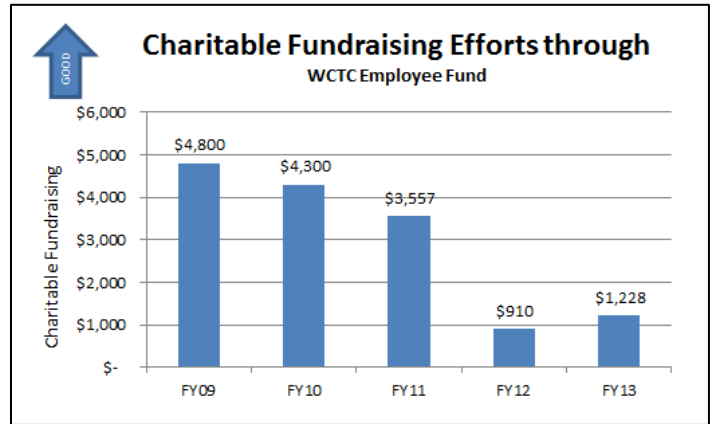
Result 7.4-15: Shows the number of specialty license plates WCTC sold over the last four years. Specialty plates approved by the legislature generate revenue for non-profit organizations. WCTC regularly participates in the promotion of specialty plates each year.
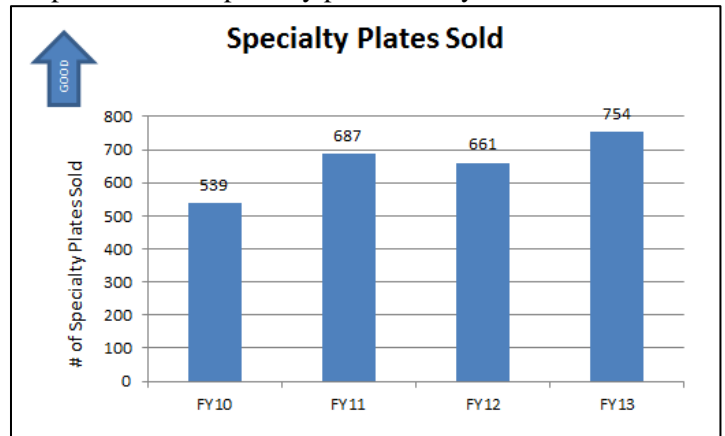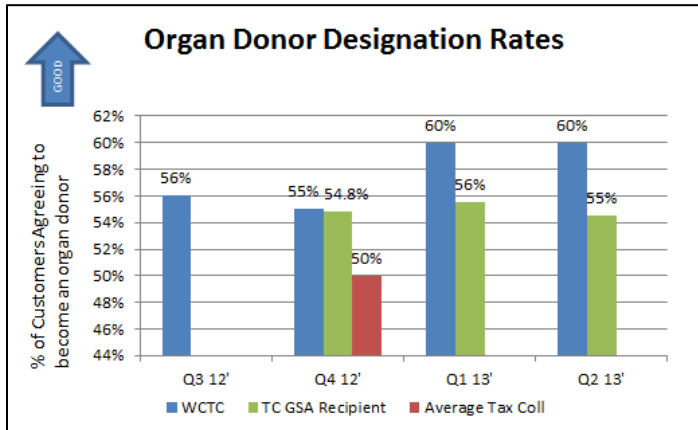

Result 7.4-16: % of Key Performance Measures aligned with strategic objectives meeting targets. The majority of underperforming targets fall in the financial results category where in recent years expenses have risen due to state mandates and revenues have declined due to decreasing property values reducing commissions.
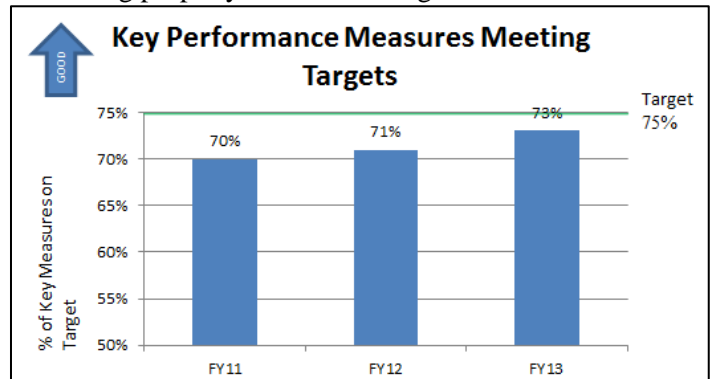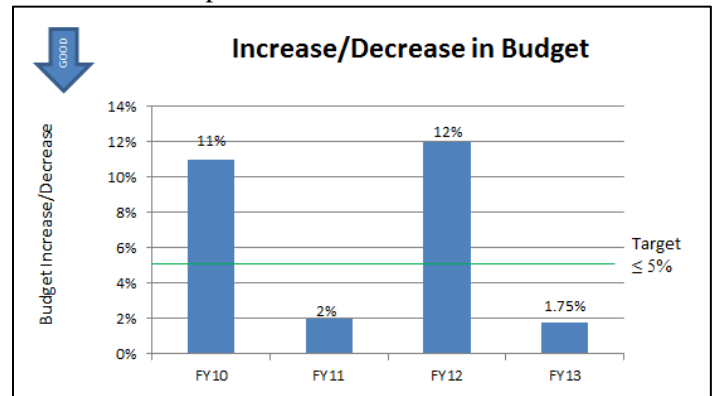
Result 7.4-17: % of DL customers responding "Yes" in election to becoming an organ donor. Donate Life Florida is contracted by the State of Florida to create the state's organ, tissue, and eye donor registry. WCTC is among 8 tax collectors successfully achieving rates at or above 60%.
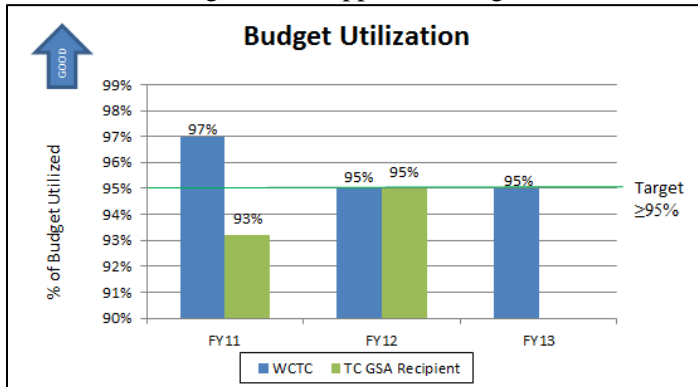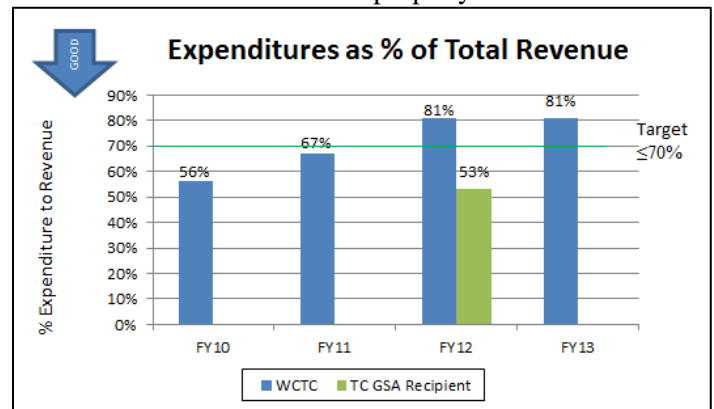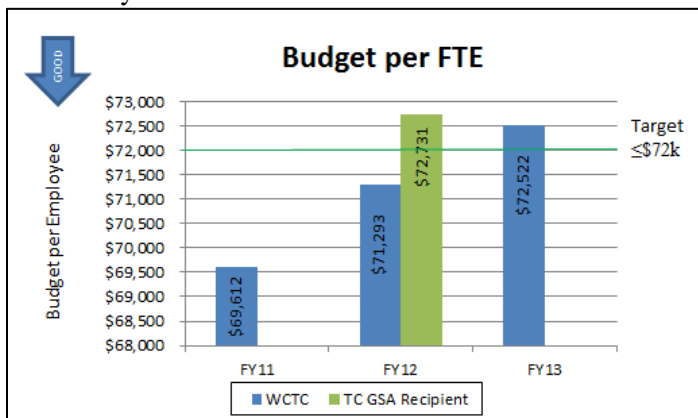

7.5 Financial and Market Results

Result 7.5-1: Demonstrates our ability to manage our annual expenditures by utilizing over 95% of the budget without exceeding the total approved budget.

Result 7.5-2: Displays total annual budget per employee. Recent budget increases are a result of the preparation and implementation of the state mandated driver license services by all Florida tax collectors.

Result 7.5-3: Tracks the percentage change in our annual budget. The FY12 budget increase is a result of the preparation and implementation of the state mandated driver license services by all Florida tax collectors. The FY10 budget increase is a result of a decision to maintain all employee health insurance costs within the tax collector's budget. Prior to this chance, the WCBCC covered these expenditures.
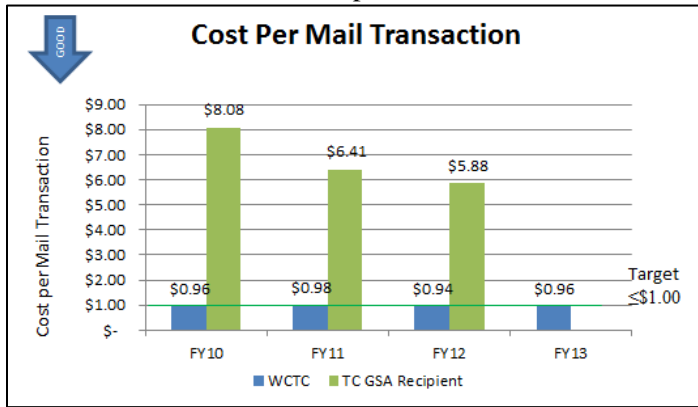

Result 7.5-4: Displays total expenditures as a percentage of total revenue for the previous four fiscal years. As indicated previously, the increase in expenditures is tied to the need to increase resources for driver license services. Also impacting this indicator is the decline in commissions retained due to the decrease in property values.

Result 7.5-5: Shows the cost per branch transaction which has increased in recent years due to budget increases.
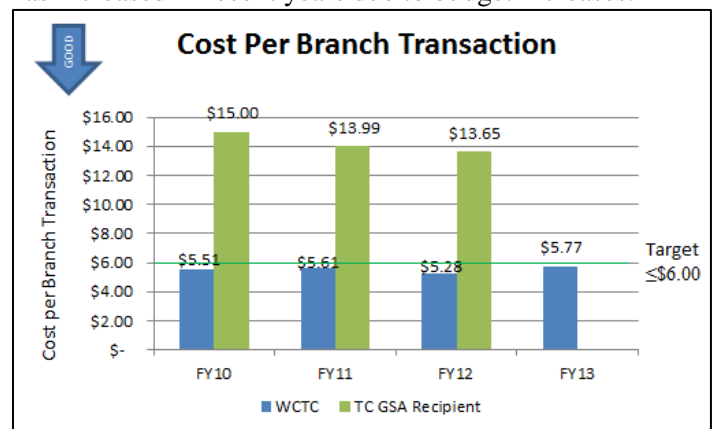
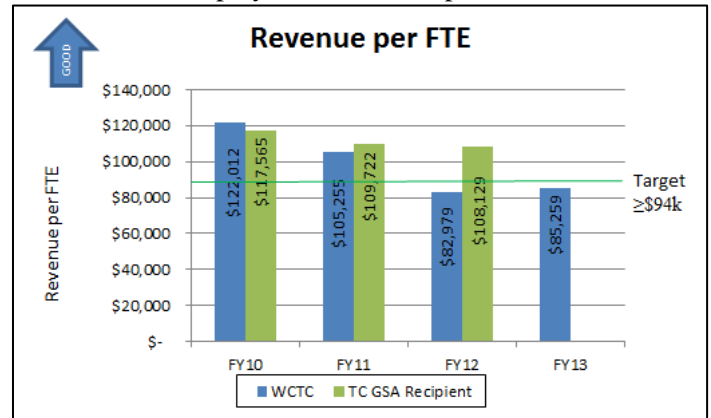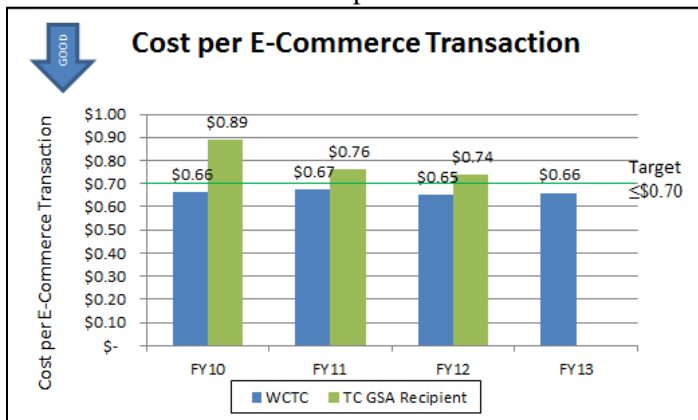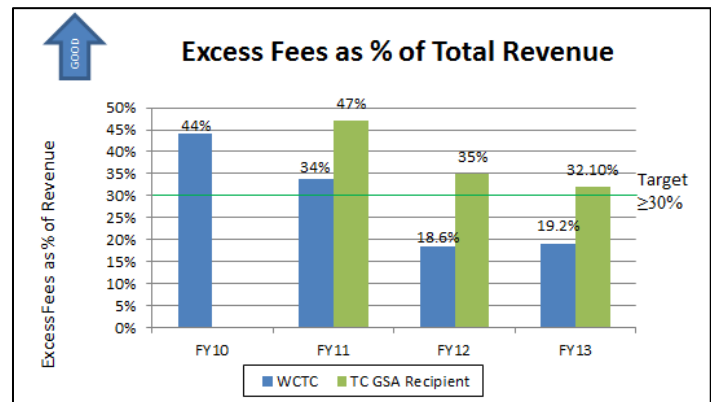**Result 7.5-6:** Shows the cost per mail transaction.

Result 7.5-7: Shows the cost per e-commerce transaction.

Result 7.5-8: Shows the decline in revenue over the previous four years most impacted by the decrease in property values.

Result 7.5-9: Displays total revenue per FTE.

Result 7.5-10: Displays excess fees as a percentage of total revenue collected. All commissions and fees collected that exceed total expenditures are returned to taxing authorities.