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## **WAAO STRATEGIC PLAN**

### **The Purpose of Planning**

The purpose of planning strategically is to deal with the future in a way which is responsive to our mission. It is a way for us to get from where we are today to where we want to be.

The reasons that we are doing this are:

1. to improve our sense of clarity and direction,
2. to help us choose from among competing goals and activities and
3. to cope with unexpected shifts in our environment.

This plan has the commitment of the WAAO leadership who are personally engaged in the planning process. We expect the strategies will lead to the desired future for the Association. We intend to maintain a proactive, rather than reactive, posture toward future events. We believe that our success lies not only with the Association leadership, but with every member.

### **Goals of the planning process**

The planning process should clearly articulate the mission and philosophy of our Association. It should enable us to meet the challenges of the future. The process should improve communication, information and knowledge sharing. It should provide a way to measure our success. The process should provide ways for clients and stakeholders to give constructive feedback. It should present a coherent view of the organization, its goals and objectives, to all users of our services.

### **The Mission**

The mission of the WAAO is to promote the public good by encouraging equitable assessments through assessor education, professional development, and engaging stakeholders.

### **The Commitments**

WAAO has made four commitments in its strategic plan:

1. Promote assessment education.
2. Maintain and enhance assessment standards and professionalism
3. Engage governmental and legislative stakeholders to improve awareness of assessment and taxation issues in Wisconsin.
4. Sustain an active and broad-based membership.

**PROMOTE ASSESSMENT EDUCATION**

**The issues are:**

- A. Improving knowledge and skills in appraisal.
- B. Increasing knowledge of assessment law.
- C. Increasing knowledge of assessment administration.
- D. Balance the networking benefits of in person training with the convenience of virtual training
- E. Keep membership updated on current assessment issues, legislation, and WAAO activities
- F. Secure locations for in-person training

**The strategies are:**

1. Sponsor a certified assessor education session at least three times each year.
2. Provide in person training at least once per year
3. At least once every other year provide a multi-day training/networking opportunity (Winter Thaw) for membership
4. Provide better communication when securing locations and planning for in-person training events by consolidating the Education and Membership Services Committees.
5. Publish a monthly (at minimum) email newsletter to inform membership of important organization/assessment events/offerings and provide updates to key issues, legislation, and court cases
6. Provide membership education that can be used for appraisal and law and management continuing education and can benefit assessment personnel with varying degrees of experience

**MAINTAIN AND ENHANCE ASSESSMENT STANDARDS AND PROFESSIONALISM**

**The issues are:**

- A. Taking an active role in statewide assessment standards.
- B. Promoting ethical standards.
- C. Promoting diversity within the assessment profession.
- D. Maintain focus on most relevant/pressing topics.
- E. Awareness of current property tax exemption issues/cases
- F. Awareness of emerging technology and its effects on the assessment profession

**The strategies are:**

- 1. Executive Board annually provide direction, goals, and objectives for Education, Standards (Technology, CAMA, Practices), and Legislative committees
- 2. Annually the WAAO Officers (Executive Board) should consider individuals, jurisdictions, or companies that have enhanced WAAO and/or the assessment profession and consider them for recognition at a future WAAO event
- 3. Annually the WAAO Executive Board should audit the activities/finances of the organization
- 4. WAAO Executive Board should receive quarterly updates from the IAAO representative which detail IAAO classes, activities, ideas that should be forwarded to our membership
- 5. WAAO Executive Board, with assistance from Diversity Rep/Chair, should establish a direction for WAAO to recruit diverse individuals into the assessment profession
- 6. Provide feedback to Wisconsin DOR yearly concerning the Wisconsin WPAM, assessment practices concerns, and exemption issues
- 7. Education, Legislative, and Standards Committees, along with the Executive Board should monthly provide material for the email newsletter.
- 8. Executive Board, at least once every two years, provide a topic/speaker to Education that focuses on emerging technology

**ENGAGE GOVERNMENTAL AND LEGISLATIVE STAKEHOLDERS TO IMPROVE AWARENESS OF ASSESSMENT AND TAXATION ISSUES IN WISCONSIN**

**The Issues are:**

- A. Monitoring legislation affecting assessment.
- B. Informing membership of current legislative issues.
- C. Creating and maintaining a legislative agenda.
- D. Improving relationship with the legislature.

**The Strategies are:**

- 1. Subscribe to and monitor the Wheeler Report for assessment and taxation issues.
- 2. Organize a bi-annual Assessors Day at the Capitol
- 3. Inform membership about assessment related legislation via the email newsletters
- 4. Develop a network within WAAO for providing information to legislators and identify WAAO individuals willing to offer testimony at legislative hearings.
- 5. Meet quarterly (at minimum) with the DOR and other stakeholders to discuss assessment and taxation issues and ideas
- 6. Become well informed on the State legislative process by annually providing information to the membership.
- 7. Maintain a list of legislative goals that can be discussed with DOR, League Wisconsin Municipalities, and Towns Association
- 8. Monitor the courts for current case decisions that influence the assessment practice, forward these cases to membership

**SUSTAIN AN ACTIVE AND BROAD-BASED MEMBERSHIP**

**The Issues are:**

- A. Increasing membership involvement
- B. Sustaining the membership base
- C. Reaching both experienced and new assessment professionals
- D. Reaching all levels in the assessment office (clerical to assessor)
- E. Reaching individuals working for contract firms and municipal offices
- F. Reaching rural and urban assessment staff
- G. Connecting with other state assessor organizations

**The Strategies are:**

1. Initiate and maintain contact with a rural assessor/firm that performs rural assessments and keep line of communication open to learn of rural assessment issues
2. Initiate contact with Indianhead Assessors Organization to determine if any consolidation or economies of scale could occur with WAAO
3. Provide funding, through scholarship fund, for WAAO members to attend IAAO/NCRAAO/WAAO courses and conferences
4. Encourage membership in IAAO and NCRAAO
5. Create incentive for involvement from low-level assessment staff by providing reduced fee membership opportunities for assessment clerical staffs
6. Offer bulk discounts for WAAO memberships and educational class fees to firms or municipalities
7. Reach out to contract assessment firms to see if there are opportunities for combined educational opportunities
8. Survey the membership every other year to determine areas of focus for WAAO