

WAAO Strategic Plan and Reorganization





The issues

- WAAO membership is decreasing
- WAAO volunteerism is waning
- WAAO's focus and mission has become cloudy
- WAAO seems to be reaching some assessment management/supervisors but fewer assessment frontline workers, staff, and appraisers
- WAAO's publication (AVOW) has typically been delayed in publication and dated when received by members
- WAAO's viability in the professional/legislative sector is waning

Planning and Management Action

- Create an Ad-Hoc committee to review WAAO's current Strategic Plan
- Keep the mission of WAAO (promote the public good by encouraging equitable assessments through assessor education, professional development, and public awareness) intact
- Identify necessary updates to reflect current trends
- Some potential topics to be addressed
 - Three main committees
 - Review of AVOW/newsletter
 - Potential of stipend for some positions
 - Potential of collaboration with contract assessors
 - Potential of group discounts



Current Strategic Plan



- In addition to WAAO's mission also sections for:
 - Purpose of planning
 - Steps in planning
 - Goals of planning
 - Metaphor for Strategic Planning
 - Six commitments
 - Promoting assessment education.
 - Promoting professionalism in assessing.
 - Actively engaging in property assessment legislation.
 - Promoting an understanding of assessment and taxation.
 - Sustaining an active, broad-based membership.
 - Promote networking and information sharing
 - Issues and strategies for each commitment

Ad Hoc Review

- Determine if the six commitments are still accurate.
- Prioritize the commitments
- Define the issues with each commitment.
- Develop strategies for each commitment.
- Create a “to do” list for the strategies





Committee's Work

- Suggest removing the Steps to Planning and a Metaphor for Planning from the Strategic Plan
- Change mission wording slightly - promote the public good by encouraging equitable assessments through assessor education, professional development, and ~~public awareness~~ engaging stakeholders
- Six commitments to four
 - Promote assessment education.
 - Maintain and enhance assessment standards and professionalism
 - Engage governmental and legislative stakeholders to improve awareness of assessment and taxation issues in Wisconsin.
 - Sustain an active and broad-based membership
- Update issues and strategies with each commitment

Committee's Suggestions

- Determine if the steps below are viable
- Create four committees/condense current committee to four
 - Executive
 - Education
 - Standards
 - Legislative
- Find dedicated members to refine committee roles based on new strategies
- Determine if any positions come with a stipend
- Present to membership for approval
- Determine which WAAO bylaws/docs need to be revised or rewritten



WAAO Action

- WAAO Leadership determined the plan was viable
- WAAO Leadership agreed with the four commitments
- WAAO Leadership did not feel that stipends were needed to achieve our goals
- Individuals and assistants were chosen to lead the four core areas defined by the Ad Hoc Committee





Four Core Area Questions

- What are responsibilities under each
- Should all WAAO committees stay committees or should they morph into larger “super” committees.
- If they stay as committees who should chair and how many members should each have; how would they report to you
- If they morph into the larger committee, how many people would be on the “super” committee, what would be the structure
- What are likely communication methods/meeting frequency and format
- How can this new committee align its goals with the new strategic plan/**what will it provide to WAAO members**

Standards

- Led by Matt Tooke, assisted by Ryan Andersen and Chris Leitz
- Super Committee taking on the responsibilities of Standards, CAMA, GIS, AI, and Technology
- Yearly changes to WPAM
- Best practices on how to value different types of property
- Approximately 6 members with quarterly meetings
- Provide topic/speaker every two years related to emerging technology





Education

- Led by Peter Krystowiak assisted by Sara Tyrrell
- One large committee that takes in the duties of Membership Services
- 5-6 total members with several being contract assessors
- Quarterly virtual meetings
- Two or three educational opportunities each year, one of which is in person
- A two-day education event every other year
- Research combined education opportunities with contract firms
- Consider creating an Education Library

Assessment Administration

- Led by Rocco Vita assisted by Michelle Laube and Michelle Drea
- Create an Assessment Administration upper committee
- Create four lower working groups
 - Legislative
 - Exemptions
 - Rural Concerns
 - DOR Liaison
- Upper committee would be comprised of the four chairs/leaders of the lower working groups
- Lower working groups would have 1 to 3 members and be available to assist, support, or research
- Upper Committee would meet 3 to 4 times a year and be led by one of the four leaders



Executive

- Led by Pam Williams (WAAO President) assisted by Cristin Erdmann
- Provide strategic leadership, coordination, and oversight across all committees, ensuring alignment with WAAO's Strategic Plan
- Lead the restructuring and strengthening of WAAO's communication
- Other Duties to include
 - Annual audit
 - Yearly awards
 - IAAO liaison
 - NCRAAO liaison
 - Establish direction to recruit diverse individuals into the assessment field
 - Consider areas of growth for WAAO (due structure, other Assessor organizations, bulk rates, clerical/entry level, etc.)
 - Timely survey membership to determine needs



Recommended Reorganization



Executive Board		
Planning & Management		
Auditing		
Awards		
Nominating		
AdHoc Diversity & Recruitment		
Communications		
IAAO Representation		
Assessment Education	Professional Standards	Assessment Administration
Education & Programming	Appraisal Standards	Legislative
	CAMA/GIS	Exemptions
Membership Services	Technology/AI	Rural Concerns
		DOR Liason

What is Next

- Vote on new Strategic Plan
- Refining assignments and process with reorganization
- Putting all new assignments and processes into an action plan
- Rewrite WAAO documents to reflect changes
- Filling roles in new structure



Goals/Benefits

- Better Inform/Communicate
 - Inter organization
 - With outside entities; DOR, Indianhead, legislators
- Have a voice
 - Ability to volunteer
 - Have united voice
- Educate
 - 30 credits over 2 years
- Support
 - Act as a hub for questions/concerns

