

ASSESSOR | COUNTY CLERK | RECORDER

STRATEGIC PLAN

2018 | 2022



"EACH AND EVERY CUSTOMER
SHOULD EXPECT TO LEAVE THE
ASSESSOR-COUNTY CLERK-RECORDER'S
OFFICE FEELING AS THOUGH THEY
WERE SERVED IN A COMPETENT
AND PROFESSIONAL MANNER."

CONTENTS

| | |
|--|----|
| Message from Peter Aldana | 4 |
| About the ACR | 5 |
| EXECUTIVE SUMMARY | 6 |
| STRATEGIC GOALS | 7 |
| Strategic Goal # 1 | 8 |
| Strategic Goal # 2 | 10 |
| Strategic Goal # 3 | 13 |
| TIMELINE | 14 |
| CONTROLLING STRATEGIC PROGRESS | 15 |

MESSAGE FROM PETER ALDANA

The Assessor-County Clerk-Recorder provides a set of fundamental services that are extremely important to our community. Each year, our Assessor division works hard to produce an accurate Assessment Roll. This roll serves as the basis for generating property tax revenue that helps fund our safe neighborhoods, good schools, and many other community-wide benefits. In addition, property owners rely on our County Clerk-Recorder operations to maintain a system of controls that keeps our property ownership records secure. We also have the important responsibility of safeguarding and making available vital records that chronicle certain life events for our residents, as well as overseeing numerous administrative processes required by law.

I am proud of the good work we do and the leadership we have displayed on many fronts, but I know that we can serve the public even more effectively, efficiently, and with greater accountability. To accomplish this, I am launching a strategic plan intended to drive success across all areas of our organization.

Over the next few years, we will pursue three over-arching strategic goals:

1. We want to build an effective team that will serve the public competently, now and into the future.
2. We want to measure our performance and continuously improve.
3. We want to improve the customer experience by providing quick, convenient, and accurate service.

I want to thank the many people at all levels of our organization who worked hard at developing this plan, and those that will work even harder to carry it out. We are making many changes to improve our organization; however, one thing will not change... our commitment to serving the public.



A handwritten signature in black ink that reads "Peter Aldana". The signature is fluid and cursive.

Assessor-County Clerk-Recorder



MISSION

Our mission is to fulfill the legally and locally mandated functions of the Assessor, County Clerk, Recorder, and Records Management Program in an accurate, timely, professional and courteous manner and to ensure high quality service.



VISION

To uphold and protect public trust through extraordinary public service, careful stewardship of public funds, transparency and accessibility, employee empowerment, innovation, collaboration, effectiveness, and leadership in local government.



CORE VALUES

Integrity, Fairness, Efficiency, Accountability, and Commitment to Excellent Public Service.



STRATEGIC GOALS

Build an effective team that will serve the public competently, Measure our performance and continuously improve, and Improve customer experience.





EXECUTIVE SUMMARY

This document outlines the deliberate steps we will take over the next few years to improve the way we serve the residents of Riverside County. Over the past year, all levels of our organization have worked closely to develop a strategic plan focused on critical areas that will drive performance, now and beyond the term of this plan.

Our department possesses many strengths, but none more important than its people. We recognize that selecting and developing highly capable employees that share a mutual commitment to excellent public service is central to our success. Without capable, supported and engaged employees, we cannot succeed. To that end, our first strategic goal is to “build an effective team that will serve the public competently, now and into the future.” This starts by aligning our Human Resource efforts with emerging practices that will increase organizational performance.

We also recognize that we must complement this new approach to team building with a data-driven framework that enhances our decision-making capabilities. Accordingly, our second goal is to “measure our performance and continuously improve.” This framework will serve as the foundation for creating a culture of continuous improvement, enabling us to determine how well we are doing and where we need to focus our attention. These collective efforts will help us

realize our third goal, to “improve the customer experience by providing quick, convenient, and accurate service.” We will do this by better understanding not only our customers’ preferences, but also how well we are meeting their needs.

Simply put, we aspire to provide exemplary public service through highly trained and motivated employees operating within a culture of continuous improvement. While considerable effort was spent developing this plan, we remain mindful that the true challenge lies within its execution. Thus, the

Our department possesses many strengths, but none more important than its people.

initiatives laid out in this plan are actionable, and will be methodically monitored and controlled to ensure effective feedback is in place and the plan’s status is highly visible at every level of our organization.

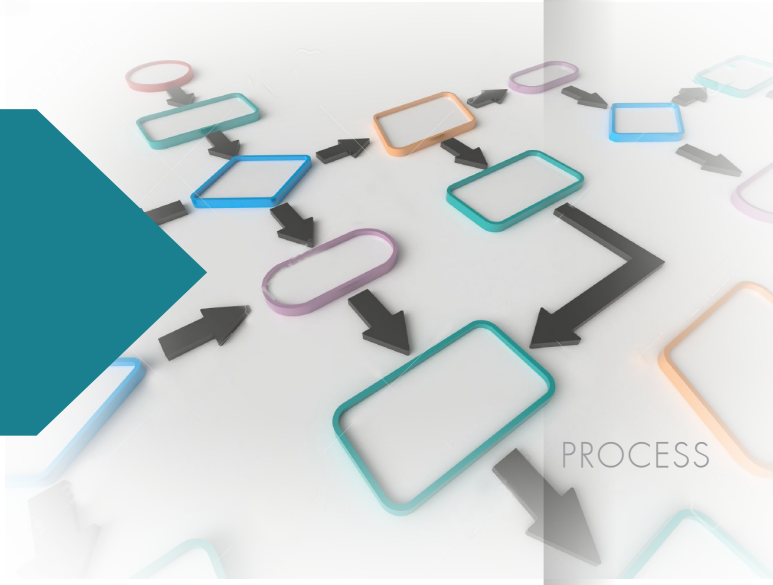
STRATEGIC GOALS

Over the next few years, we will pursue three over-arching strategic goals:



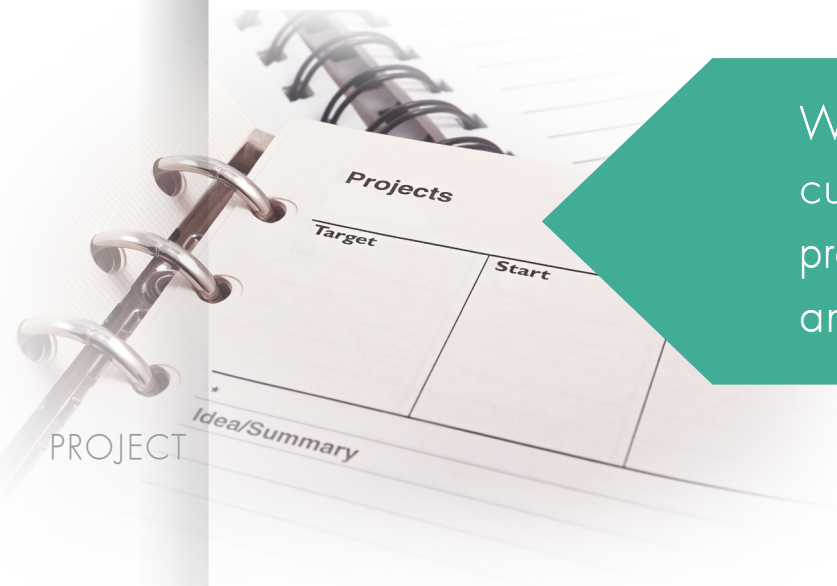
PEOPLE

We want to build an effective team that will serve the public competently, now and into the future.



PROCESS

We want to measure our performance and continuously improve.



PROJECT

We want to improve the customer experience by providing quick, convenient, and accurate service.

STRATEGIC GOAL # 1

We want to build an effective team that will serve the public competently, now and into the future.

Our goal to provide extraordinary public service relies on the capabilities and drive of our staff. We will build effective teams by focusing our efforts toward actively sourcing talent, listening to and recognizing employees, encouraging collaboration, and advocating staff empowerment.



| OBJECTIVE | INITIATIVE | DESIRED OUTCOME |
|--|---|---|
| <p>1.1 Attract Top Talent that will bring new perspectives and critical thinking, as well as possess values consistent with ours.</p> | <ul style="list-style-type: none"> * Partner with local colleges and universities. * Optimize our Internship Program. | <p>Staff with cutting-edge skill sets that can assimilate quickly and make an immediate impact.</p> |
| <p>1.2 Employee Engagement helps us retain talented workers and improve our work product.</p> | <ul style="list-style-type: none"> * Use the “Ideas Committee” as a platform for employees to share their ideas on how to improve the workplace. | <p>Employees feel supported and encouraged to contribute ideas resulting in a greater amount of improvements from line staff.</p> |
| <p>1.3 Provide Timely and Effective Training to help our employees do a better job.</p> | <ul style="list-style-type: none"> * Leverage our employee performance management system (Cornerstone). * Implement ACR “YOU” as a central training portal linked to the County’s Learning Management System (LMS). | <p>Core requirements are met and discretionary training is easily accessible.</p> |
| <p>1.4 Develop a Succession Plan to create an agile and resilient organization.</p> | <ul style="list-style-type: none"> * Develop a staff rotation model. * Implement a “Critical Two Deep” plan. | <p>Business operations are never caught off guard by an employee separation; talented pipeline of staff ready to seize opportunities and assume leadership roles.</p> |
| <p>1.5 We will capture every opportunity to strike a healthy Work Life Balance.</p> | <ul style="list-style-type: none"> * Undertake a “Telecommuting” feasibility study. | <p>Increased employee engagement at all levels and decreased unplanned absences.</p> |

STRATEGIC GOAL # 2

We want to measure our performance and continuously improve.

We will leverage data and technology to facilitate the delivery of extraordinary customer service through operational efficiencies, a strict adherence to rigid quality standards, and a culture of continuous improvement.





| OBJECTIVE | INITIATIVE | DESIRED OUTCOME |
|---|--|--|
| <p>2.1 Develop a Data Performance Framework enabling a quick assessment of efficiencies, effectiveness, and quality of our work.</p> | <p>* Multi-phased Key Performance Indicators (KPI) Development Plan.</p> | <p>Better decision-making and asset utilization through the use of data; increased return on investments (ROI) and operational efficiencies; high degree of organizational transparency.</p> |
| <p>2.2 Create a Detailed Costing Infrastructure to report data at the service line level.</p> | <p>* Costing Model.</p> | <p>Total cost and project return on investment are key considerations in decision-making.</p> |
| <p>2.3 Cultivate a Culture of Continuous Improvement to optimize systems and underlying processes.</p> | <p>* CREST Implementation. * Trusted Systems Consulting model. * Project Management Academy.</p> | <p>Process architectures are aligned with business goals to solve problems and achieve better results.</p> |

*Public service remains a
top priority for our office.*



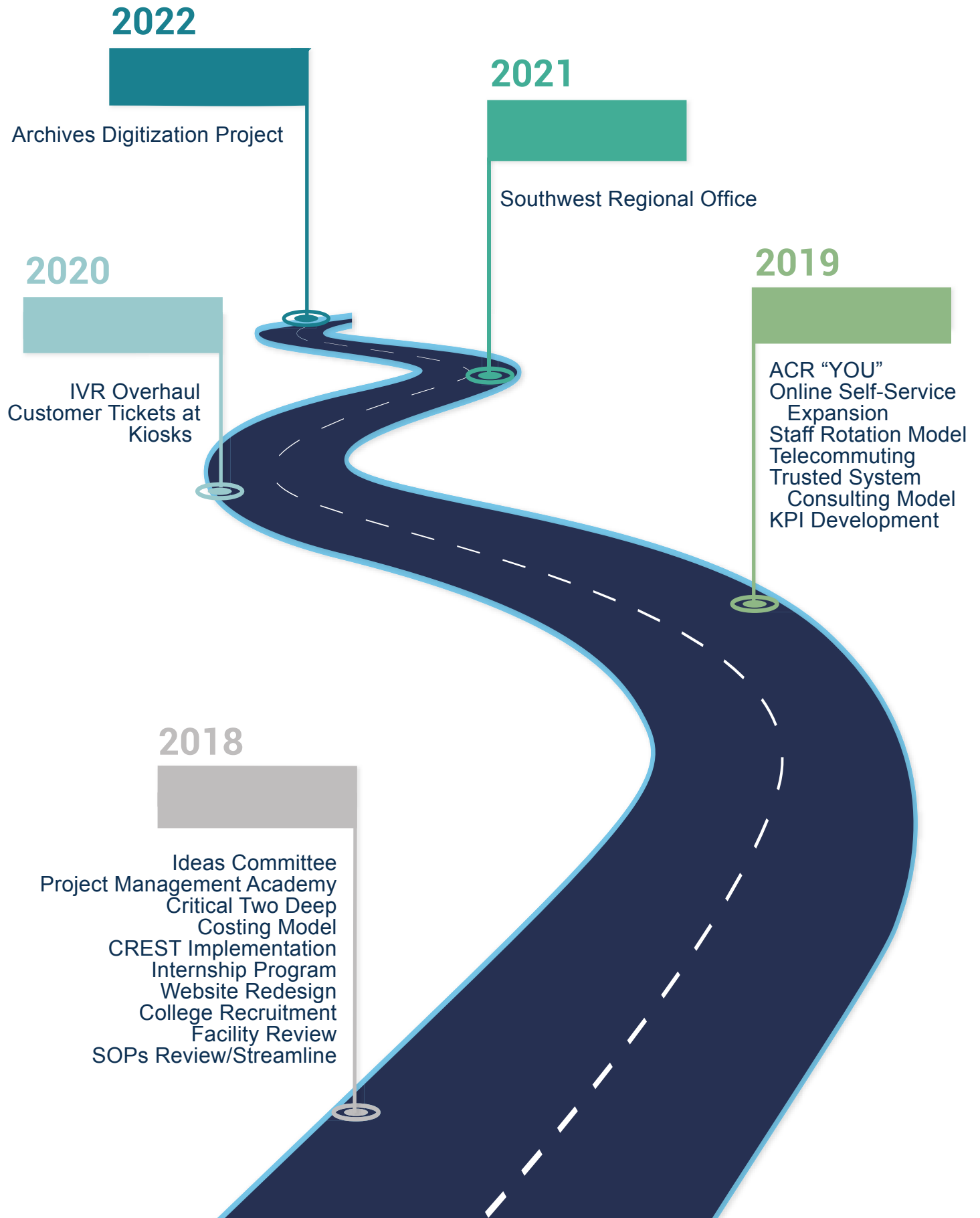
STRATEGIC GOAL # 3

We want to improve the customer experience by providing quick, convenient, and accurate service.

We know our customers' expectations because we have asked them. Our customers want to complete their business with us quickly and conveniently. To do this, we will take a customer centric approach to delivering public service.

| OBJECTIVE | INITIATIVE | DESIRED OUTCOME |
|---|--|--|
| <p>3.1 Offer More Remote Service Options to provide our customers more accessibility.</p> | <ul style="list-style-type: none"> * Website redesign. * IVR overhaul. * Increase online self-service capabilities. * Launch Public Outreach Campaign. * Archives Digitization Project. | <p>Customers have easy-to-use tools so they can conduct business with ACR whenever and wherever they like.</p> |
| <p>3.2 Offer Convenient, Full-Service Locations to accommodate our County's large geographic area.</p> | <ul style="list-style-type: none"> * Gateway Office reorganization. * Southwest Regional Office. * Facility review to make locations more welcoming. | <p>Conveniently located and welcoming offices where the public can do business with the ACR.</p> |
| <p>3.3 Streamline Operations to increase efficiencies.</p> | <ul style="list-style-type: none"> * Review and streamline Standard Operating Procedures (SOPs). * Issue customer tickets at the kiosks. | <p>Effective and efficient delivery of customer service.</p> |

TIMELINE



CONTROLLING STRATEGIC **PROGRESS**

Our ability to sustain our commitment to what this plan sets out to accomplish is the most critical success factor. Meeting our goals and objectives will require an abundant amount of communication, coordination, visibility, and accountability. As part of our control measures, our administrative division will regularly monitor the plan's overall progress. Concurrently, executive sponsors and project managers will oversee each of our strategic initiatives. Status updates will be

disseminated monthly, with strategic briefings held each quarter. Effective communication and designated accountability will allow for timely plan assessments and corrective actions.

The process of controlling the plan's implementation is where the real work begins.

| INITIATIVE | TARGET COMPLETION DATE | PERFORMANCE MEASURE |
|-------------------------------------|------------------------|---|
| 1.1 College Recruitment | 12/2018 | Proactive college hires |
| 1.1 Internship Program | 10/2018 | Exit survey results |
| 1.2 Ideas Committee | 1/2018 | Employee ideas implemented |
| 1.3 ACR "You" | 1/2019 | Training Rate |
| 1.4 Staff Rotation Model | 1/2019 | Organizational readiness assessment |
| 1.4 Critical Two Deep | 8/2018 | Percentage of critical positions with contingency personnel |
| 1.5 Telecommuting | 1/2019 | Remote vs. onsite employee production rate |
| 2.1 KPI Development | 9/2019 | Unit implementation |
| 2.2 Costing Model | 9/2018 | Unit budget established |
| 2.3 CREST Implementation | 10/2018 | User satisfaction rate |
| 2.3 Trusted System Consulting Model | 3/2019 | Certification |
| 2.3 Project Management Academy | 7/2018 | Completion rate |
| 3.1 Website Redesign | 10/2018 | Website traffic & services available |
| 3.1 IVR Overhaul | 1/2020 | Call volume; Percentage of dropped calls & multiple transfers |
| 3.1 Online Self-Service Expansion | 1/2019 | e-Filings vs. paper filings |
| 3.1 Archives Digitization Project | 3/2022 | Online usage rate |
| 3.2 Southwest Regional Office | 1/2021 | Cost savings |
| 3.2 Facility Review | 12/2018 | Customer experience |
| 3.3 SOPs Review and Streamline | 12/2018 | Business processes efficiency |
| 3.3 Customer Tickets at Kiosks | 6/2020 | Wait times |

PO Box 751
Riverside, CA 92502-0751

www.riversideacr.com

