

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

At a Glance:

Total FY 2004-2005 Projected Expend + Encumb:	2,694,248
Total Recommended FY 2005-2006	2,601,173
Percent of County General Fund:	0.09%
Total Employees:	33.00

Strategic Goals:

- Facilitate the decision and policy making of Orange County government.
- Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.
- Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients.

Key Outcome Indicators:

Performance Measure	2004 Business Plan Results	2005 Business Plan Target	How are we doing?
PERCENT OF ACCURATE BOARD OF SUPERVISORS AGENDA TITLES. What: Measurement of COB's accuracy and training. Why: Indicator of COB's compliance with Brown Act and identifies areas requiring training.	99.2% of published agenda titles were accurate with no errors.	99.25% of agenda titles are published with no errors.	COB has consistently maintained a high level of accuracy.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of applications and process. Why: Measures success of the COB's training and outreach efforts to the public and tax agents.	85% of applications were completed accurately and timely filed.	85% of applications accurately completed and timely filed.	Litigation regarding 2% cap on annual property tax value increase created public confusion, resulting in more inaccurate applications during the last two filing periods. That case has now been resolved.
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Assesses whether policies and procedures result in processing appeals within the statutory deadline.	Although the 2 year deadline has not yet expired for all of the 2003 filings, 84% of the appeals have been resolved or waivers received. Cases in litigation included in unresolved.	100% of appeals resolved or waivers filed, excluding cases in litigation.	COB meeting goal due to manageable number of filings and quality tracking of database information and appeals.



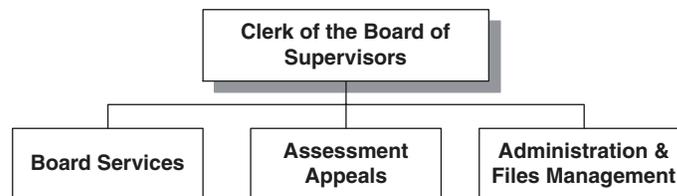
Key Outcome Indicators: (Continued)

Performance Measure	2004 Business Plan	2005 Business Plan	How are we doing?
	Results	Target	
PERCENT OF ASSESSMENT APPEALS HEARINGS HELD OR SCHEDULED WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Measures COB's success in timely resolution of appeals & reduces duplicates in following year.	99.4% of 2003 filings held initial hearings within one year, excluding those with applicant waivers filed.	95% of hearings scheduled within one year, excluding filings with applicant waivers.	With filings remaining at a manageable level for several years and usage of automation, COB has been successful in providing this level of client service. However, with increased filings, ability to provide this level of service may decline.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: Assesses COB's success in meeting the needs of its customers in a professional and courteous manner.	COB has received favorable ratings from 95%-100% of respondents.	97% rating of services as good or outstanding.	COB has received favorable ratings from 95%-100% of its clients.

FY 2004-05 Key Project Accomplishments:

- Re-located Assessment Appeals Intake unit into Hall of Administration for more efficient management of the department and relocation of public service activities to the first floor.
- Developed computer shared area providing all staff with access to department policies, procedures and forms.
- Expanded information provided on Clerk of the Board's public website and internal County intranet site.

Organizational Summary



COB - Executive - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

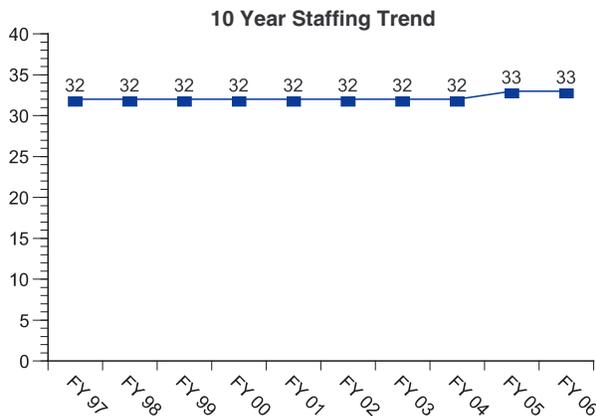
Board Services - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Commissions and Committees; processes legal publications, postings and notices; receives and administers bid

openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

Assessment Appeals - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and Hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

Administration/Files Mgmt - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing, petty cash and payroll functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- Clerk of the Board has maintained level staffing requirements primarily due to automation of previously labor-intensive activities. Increase of one position in FY 04-05 was due to a transfer from the County Executive Office to support the Board Chairman.

Budget Summary

Plan for Support of the County's Strategic Priorities:

Through use of automation developed and implemented over the past few years, COB has been able to reduce ongoing operational costs and maintain level staffing. COB will continue to pursue cost savings and revenue enhancements where efficient and cost-effective. Ideas implemented include use of on-line filing of assessment appeals applications to reduce errors and eliminate costs of data entry and utilization of online document storage to reduce printing costs and for faster and easier document location and retrieval.

Changes Included in the Recommended Base Budget:

Reductions were made for one-time costs included in FY 04-05 budget of \$55,000 for relocation of Assessment Appeals Intake unit, \$75,000 for claims administrator in Bunker class action lawsuit and \$10,000 allocated for facility maintenance. In order to meet its FY 05-06 Net County Cost limit, the department reduced services and supplies expenditures required for a level service budget by \$79,147, with the most significant reductions made to telephone services, reprographics costs, postage, facility maintenance and general office supplies. An augmentation to restore these funds has been submitted.

Requested Budget Augmentations and Related Performance Results:

Unit Amount	Description	Performance Plan	Brass Ser.
FUNDING TO RESTORE CURRENT LEVEL OF SERVICE Amount:\$ 79,147	\$79,147 to restore reductions made to meet NCC limit. Funding req'd to provide continue level svc.	Funding will allow Department to continue to operate at the same level of service as FY 2004-05.	2383
RESTORE CONTINGENCY FUNDING FOR BOARD & PLANNING COMMISSION ROOM MINOR REPAIRS Amount:\$ 10,000	Restore \$10K funding for minor repairs to Board & Planning Commission Rooms and other mtg rooms.	Provides contingency funding to address minor repairs in a timely manner.	2386



Proposed Budget History:

Sources and Uses	FY 2003-2004	FY 2004-2005	FY 2004-2005	FY 2005-2006	Change from FY 2004-2005	
	Actual	Budget As of 3/31/05	Projected ⁽¹⁾ At 6/30/05	Recommended	Projected Amount	Projected Percent
Total Positions	-	33	33	33	0	0.00
Total Revenues	14,501	154,300	161,783	121,100	(40,683)	-25.14
Total Requirements	2,398,816	2,710,609	2,705,017	2,601,173	(103,844)	-3.83
Net County Cost	2,384,315	2,556,309	2,543,234	2,480,073	(63,161)	-2.48

(1) Requirements include prior year encumbrance and expenditures. Therefore, the above totals may not match FY 2004-05 projected requirements included in "At a Glance" (Which exclude these).

Detailed budget by expense category and by activity is presented for agency: Clerk of the Board in the Appendix on page page 472

Highlights of Key Trends:

- In FY 2005-06, the Clerk of the Board will continue to focus on implementation, critical enhancements and general maintenance of the existing multi-year automation needs/projects. It is essential that the Clerk of the Board ensure the integrity of the existing automation that allows the department to promptly and adequately respond to greater demands in assessment appeals filings. The FY 2004-05 filing year is anticipated to remain stable at last year's increased rate; however it is difficult

to anticipate workload for the FY 2005-06 filing year. High interest rates, or a "soft" housing market could have a significant impact on next year's residential filings.

- The department continues to focus on new automation techniques and public outreach to enhance service levels to both the public and internal clients, as well as enhance the preservation of documents and retrieval of information retained by the Clerk of the Board.

Budget Units Under Agency Control:

No.	Agency Name	COB - Executive	Board Services	Assessment Appeals	Administration/Files Mgmt	Total
011	Clerk of the Board	343,722	685,913	951,612	619,926	2,601,173
	Total	343,722	685,913	951,612	619,926	2,601,173



011 - Clerk of the Board

Summary of Proposed Budget by Revenue and Expense Category:

Revenues/Appropriations	FY 2003-2004	FY 2004-2005	FY 2004-2005	FY 2005-2006	Change from FY 2004-2005	
	Actual	Budget As of 3/31/05	Projected ⁽¹⁾ As of 6/30/05	Recommended	Projected Amount	Projected Percent
Charges For Services	\$ 14,007	\$ 151,200	\$ 161,000	\$ 121,100	\$ (39,900)	-24.78%
Miscellaneous Revenues	494	3,100	783	0	(783)	-100.00
Total Revenues	14,501	154,300	161,783	121,100	(40,683)	-25.14
Salaries & Benefits	1,810,076	1,968,284	1,942,822	2,014,911	72,089	3.71
Services & Supplies	582,125	743,663	763,595	588,362	(175,233)	-22.94
Services & Supplies Reimbursements	0	0	0	(2,100)	(2,100)	0.00
Fixed Assets	8,215	0	0	0	0	0.00
Intrafund Transfers	(1,600)	(1,338)	(1,400)	0	1,400	-100.00
Total Requirements	2,398,816	2,710,609	2,705,017	2,601,173	(103,844)	-3.83
Net County Cost	\$ 2,384,315	\$ 2,556,309	\$ 2,543,234	\$ 2,480,073	\$ (63,161)	-2.48%

(1) Requirements include prior year encumbrance and expenditures. Therefore, the above totals may not match FY 2004-05 projected requirements included in "At a Glance" (Which exclude these).

Proposed Budget Summary of COB - Executive:

Revenues/Appropriations	FY 2003-2004	FY 2004-2005	FY 2004-2005	FY 2005-2006	Change from FY 2004-2005	
	Actual	Budget As of 3/31/05	Projected ⁽¹⁾ As of 6/30/05	Recommended	Projected Amount	Projected Percent
Charges For Services	\$ 7,375	\$ 0	\$ 2,500	\$ 0	\$ (2,500)	-100.00%
Miscellaneous Revenues	168	0	783	0	(783)	-100.00
Total Revenues	7,543	0	3,283	0	(3,283)	-100.00
Salaries & Benefits	366,056	304,518	1,942,822	319,916	(1,622,906)	-83.53
Services & Supplies	133,264	53,230	752,826	23,806	(729,020)	-96.83
Intrafund Transfers	0	0	(1,400)	0	1,400	-100.00
Total Requirements	499,320	357,748	2,694,248	343,722	(2,350,526)	-87.24
Net County Cost	\$ 491,777	\$ 357,748	\$ 2,690,965	\$ 343,722	\$ (2,347,243)	-87.22%

Proposed Budget Summary of Board Services:

Revenues/Appropriations	FY 2003-2004		FY 2004-2005		FY 2004-2005		Change from FY 2004-2005	
	Actual	Budget	As of 3/31/05	Projected ⁽¹⁾	As of 6/30/05	Recommended	Projected	Percent
Charges For Services	\$ 6,632	\$ 0	\$ 0	\$ 8,500	\$ 8,500	\$ 8,100	\$ (400)	-4.70%
Miscellaneous Revenues	326	0	0	0	0	0	0	0.00
Total Revenues	6,958	0	0	8,500	8,500	8,100	(400)	-4.70
Salaries & Benefits	329,815	398,154	0	0	474,857	474,857	474,857	0.00
Services & Supplies	127,583	157,777	733	733	213,156	212,423	28,991.85	
Services & Supplies Reimbursements	0	0	0	0	(2,100)	(2,100)	0.00	
Fixed Assets	8,215	0	0	0	0	0	0.00	
Intrafund Transfers	(1,600)	(1,338)	0	0	0	0	0.00	
Total Requirements	464,012	554,593	733	733	685,913	685,180	93,514.43	
Net County Cost	\$ 457,055	\$ 554,593	\$ (7,767)	\$ (7,767)	\$ 677,813	\$ 685,580	-8,826.49%	

Proposed Budget Summary of Assessment Appeals:

Revenues/Appropriations	FY 2003-2004		FY 2004-2005		FY 2004-2005		Change from FY 2004-2005	
	Actual	Budget	As of 3/31/05	Projected ⁽¹⁾	As of 6/30/05	Recommended	Projected	Percent
Charges For Services	\$ 0	\$ 138,000	\$ 138,000	\$ 115,615	\$ 115,615	\$ 110,000	\$ (5,615)	-4.85%
Total Revenues	0	138,000	138,000	115,615	115,615	110,000	(5,615)	-4.85
Salaries & Benefits	652,248	697,876	0	0	672,141	672,141	0.00	
Services & Supplies	308,722	418,337	10,037	10,037	279,471	269,434	2,684.40	
Total Requirements	960,970	1,116,213	10,037	10,037	951,612	941,575	9,381.03	
Net County Cost	\$ 960,970	\$ 978,213	\$ (105,578)	\$ (105,578)	\$ 841,612	\$ 947,190	-897.14%	

Proposed Budget Summary of Administration/Files Mgmt:

Revenues/Appropriations	FY 2003-2004		FY 2004-2005		FY 2004-2005		Change from FY 2004-2005	
	Actual	Budget	As of 3/31/05	Projected ⁽¹⁾	As of 6/30/05	Recommended	Projected	Percent
Charges For Services	\$ 0	\$ 13,200	\$ 13,200	\$ 34,385	\$ 34,385	\$ 3,000	\$ (31,385)	-91.27%
Miscellaneous Revenues	0	3,100	3,100	0	0	0	0	0.00
Total Revenues	0	16,300	16,300	34,385	34,385	3,000	(31,385)	-91.27
Salaries & Benefits	461,958	567,736	0	0	547,997	547,997	0.00	
Services & Supplies	12,556	114,319	0	0	71,929	71,929	-	
Total Requirements	474,514	682,055	0	0	619,926	619,926	134,766,621.73	
Net County Cost	\$ 474,514	\$ 665,755	\$ (34,385)	\$ (34,385)	\$ 616,926	\$ 651,311	-1,894.14%	

