

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 2005-2006 Projected Expend + Encumb:	2,598,146
Total Recommended FY 2006-2007	2,790,624
Percent of County General Fund:	0.09%
Total Employees:	32.00

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	2005 Business Plan	2006 Business Plan	How are we doing?
	Results	Target	
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.	99.4% 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.	86% of applications were completed accurately and timely filed.	88% of applications accurately completed and timely filed.	The State mandated form can be confusing to taxpayers. Increased use of e-filing and continued outreach should improve these statistics.
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 2004 filings, 99.2% 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.



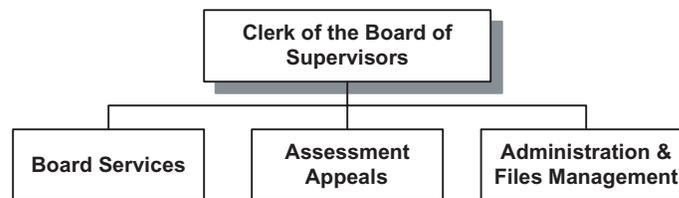
Key Outcome Indicators: (Continued)

Performance Measure	2005 Business Plan	2006 Business Plan	How are we doing?
	Results	Target	
<p>PERCENT OF ASSESSMENT APPEALS HEARINGS HELD OR SCHEDULED WITHIN ONE YEAR OF FILING.</p> <p>What: Indicator of efficiency in processing and scheduling appeals.</p> <p>Why: Measures COB's success in timely resolution of appeals & reduces duplicates in following year.</p>	99% of 2004 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 and more complex cases, ability to provide this level of service may decline.
<p>RESULTS OF CUSTOMER SATISFACTION SURVEYS.</p> <p>What: Measurement of success in meeting clients' needs.</p> <p>Why: Assesses COB's success in meeting the needs of its customers in a professional and courteous manner.</p>	COB has received favorable ratings from 95%-100% of respondents.	97% rating of services as good or outstanding.	COB has consistently received favorable ratings from its clients.

FY 2005-06 Key Project Accomplishments:

- Continued participation with property tax administration departments in development of new Orange County Assessment Tax System
- Increased usage of e-filing for assessment appeals applications
- Began needs assessment and planning for development of Conflict of Interest form e-filing

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.

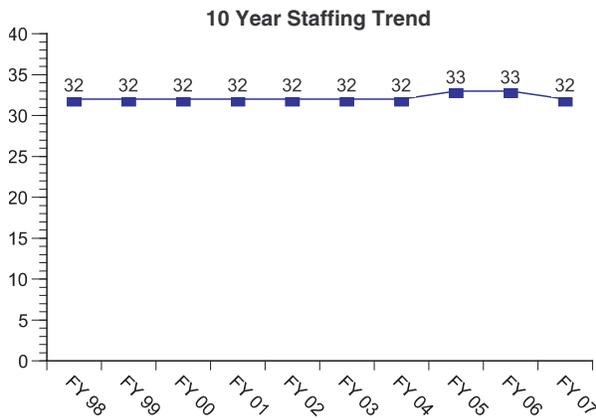
Board Services - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Commissions and Committees; processes legal publications, post-

ings 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:

- Even with increased workload and additional responsibilities and services, Clerk of the Board has maintained level staffing requirements for over ten years and has virtually eliminated the use of extra and temporary help. This has been accomplished primarily through automation of previously labor-intensive activities. Increase of one position in FY 04-05 was due to the transfer from the County Executive Office of the position supporting 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. This has been accomplished while at the same time enhancing the availability of information and documents both internal to the County and to the general public. 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:

In order to meet its 06-07 Net County Cost limit, the Clerk of the Board was required to delete one position. An augmentation request has been submitted for its restoration as loss of the position would jeopardize the department's ability to provide services in a timely manner or result in errors or omissions that could make the County vulnerable to lawsuits or legal challenge of actions.

Requested Budget Augmentations and Related Performance Results:

Unit Amount	Description	Performance Plan	BRASS Ser.
Restore Board Services Specialist Position and NCC to Maintain Current Level of Service Amount:\$ 42,580	Restore one Board Services Specialist position deleted to meet NCC limit	Complete mandated/time sensitive files management and public record requests; ASR review/tracking	5125



Proposed Budget History:

Sources and Uses	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual	Budget As of 3/31/06	Projected ⁽¹⁾ At 6/30/06	Recommended	Projected Amount	Projected Percent
Total Positions	33	33	33	32	(1)	-3.03
Total Revenues	201,996	121,100	84,695	144,327	59,632	70.41
Total Requirements	2,698,016	2,690,320	2,653,088	2,790,624	137,536	5.18
Net County Cost	2,496,021	2,569,220	2,568,393	2,646,297	77,904	3.03

(1) Requirements include prior year encumbrance and expenditures. Therefore, the above totals may not match FY 2005-06 projected requirements included in "At a Glance" (Which exclude these).

Columns may not total correctly due to rounding.

Detailed budget by expense category and by activity is presented for agency: Clerk of the Board in the Appendix on page A20

Highlights of Key Trends:

- The department continues to focus on new automation techniques and public outreach efforts to enhance service levels to both the public and internal clients.

Budget Units Under Agency Control:

No.	Agency Name	COB - Executive	Board Services	Assessment Appeals	Administration/Files Mgmt	Total
011	Clerk of the Board	378,368	795,967	992,845	623,444	2,790,624
	Total	378,368	795,967	992,845	623,444	2,790,624

011 - Clerk of the Board

Summary of Proposed Budget by Revenue and Expense Category:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual	Budget As of 3/31/06	Projected ⁽¹⁾ At 6/30/06	Recommended	Projected Amount	Projected Percent
Charges For Services	\$ 199,848	\$ 121,100	\$ 83,203	\$ 142,827	\$ 59,624	71.66%
Miscellaneous Revenues	2,148	0	1,492	1,500	8	0.54
Total Revenues	201,996	121,100	84,695	144,327	59,632	70.41
Salaries & Benefits	1,936,006	2,014,911	1,912,439	2,139,631	227,192	11.88
Services & Supplies	764,391	677,509	743,030	653,393	(89,637)	-12.06
Services & Supplies Reimbursements	0	(2,100)	0	0	0	0.00
Intrafund Transfers	(2,381)	0	(2,381)	(2,400)	(19)	0.80
Total Requirements	2,698,016	2,690,320	2,653,088	2,790,624	137,536	5.18
Net County Cost	\$ 2,496,021	\$ 2,569,220	\$ 2,568,393	\$ 2,646,297	\$ 77,904	3.03%

(1) Requirements include prior year encumbrance and expenditures. Therefore, the above totals may not match FY 2005-06 projected requirements included in "At a Glance" (Which exclude these).

Columns may not total correctly due to rounding.

Proposed Budget Summary of COB - Executive:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual	Budget As of 3/31/06	Projected ⁽¹⁾ At 6/30/06	Recommended	Projected Amount	Projected Percent
Charges For Services	\$ 2,004	\$ 0	\$ 244	\$ 0	\$ (244)	-100.00%
Miscellaneous Revenues	1,768	0	755	1,000	245	32.45
Total Revenues	3,771	0	999	1,000	1	0.10
Salaries & Benefits	375,672	319,916	393,764	398,764	5,000	1.27
Services & Supplies	194,335	25,244	144,540	58,524	(86,016)	-59.51
Total Requirements	570,007	345,160	538,304	457,288	(81,016)	-15.05
Net County Cost	\$ 566,236	\$ 345,160	\$ 537,305	\$ 456,288	\$ (81,017)	-15.08%

Proposed Budget Summary of Board Services:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual	Budget As of 3/31/06	Projected ⁽¹⁾ At 6/30/06	Recommended	Projected Amount	Projected Percent
Charges For Services	\$ 11,916	\$ 8,100	\$ 9,580	\$ 8,100	\$ (1,480)	-15.45%
Miscellaneous Revenues	380	0	737	500	(237)	-32.16
Total Revenues	12,296	8,100	10,317	8,600	(1,717)	-16.64
Salaries & Benefits	452,581	474,857	474,103	544,606	70,503	14.87

Proposed Budget Summary of Board Services:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual	Budget As of 3/31/06	Projected ⁽¹⁾ At 6/30/06	Recommended	Projected Amount	Percent
Services & Supplies	174,879	282,797	178,920	253,761	74,841	41.83
Services & Supplies Reimbursements	0	(2,100)	0	0	0	0.00
Intrafund Transfers	(2,381)	0	(2,381)	(2,400)	(19)	0.80
Total Requirements	625,079	755,554	650,642	795,967	145,325	22.34
Net County Cost	\$ 612,783	\$ 747,454	\$ 640,325	\$ 787,367	\$ 147,042	22.96%

Proposed Budget Summary of Assessment Appeals:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual	Budget As of 3/31/06	Projected ⁽¹⁾ At 6/30/06	Recommended	Projected Amount	Percent
Charges For Services	\$ 150,643	\$ 110,000	\$ 69,545	\$ 128,322	\$ 58,777	84.52%
Total Revenues	150,643	110,000	69,545	128,322	58,777	84.52
Salaries & Benefits	587,436	672,141	579,028	712,660	133,632	23.08
Services & Supplies	381,480	295,474	407,454	322,765	(84,689)	-20.78
Total Requirements	968,916	967,615	986,482	1,035,425	48,943	4.96
Net County Cost	\$ 818,272	\$ 857,615	\$ 916,937	\$ 907,103	\$ (9,834)	-1.07%

Proposed Budget Summary of Administration/Files Mgt:

Revenues/Appropriations	FY 2004-2005	FY 2005-2006	FY 2005-2006	FY 2006-2007	Change from FY 2005-2006	
	Actual	Budget As of 3/31/06	Projected ⁽¹⁾ At 6/30/06	Recommended	Projected Amount	Percent
Charges For Services	\$ 35,285	\$ 3,000	\$ 3,834	\$ 6,405	\$ 2,571	67.06%
Total Revenues	35,285	3,000	3,834	6,405	2,571	67.06
Salaries & Benefits	520,317	547,997	465,544	483,601	18,057	3.88
Services & Supplies	13,697	73,994	12,116	18,343	6,227	51.39
Total Requirements	534,014	621,991	477,660	501,944	24,284	5.08
Net County Cost	\$ 498,730	\$ 618,991	\$ 473,826	\$ 495,539	\$ 21,713	4.58%