

FORM 706 Statement of Work

Clerk of the Assessment Appeals Board
Calculating Judicial Support Services
Santa Ana, CA 92701-0001
TEL: 949-251-5217 FAX: 949-251-5177
FOR MAILING
PLEASE MAIL TO:

AGENDA STAFF REPORT

Agenda Item
ASR Control 10-000406

Application to Boards, Commissions, and Committees

Directions: Please answer each question that applies to you as complete Clerk of the Board of Supervisors
Return completed application to:
333 W. Santa Ana Blvd
Santa Ana, CA 927

BID OPENING SCHEDULE 2010 UPCOMING

Certificate of Appointment-Oath/Affirmation

STATE OF CALIFORNIA)
County of Orange) ss.
I, _____, County of Orange, State
(Department Head's Name)

Our Mission

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.



Clerk of the Board of Supervisors

333 W. Santa Ana Blvd., Suite 465

Santa Ana, CA 92701

(714) 834-3453 ** FAX (714) 834-4439

Susan Novak

Clerk of the Board

March 2012

Dear Readers:

We are pleased to present the second Clerk of the Board Annual Report.

Unlike our Business Plan which provides an overview of our department's goals for the upcoming year and the future, the annual report provides a look at COB's everyday duties and workload. From the number of agenda items processed to public records requests to assessment appeals filed, I know you will find this report both informative and surprising in regards to the amount of items that come through our office each year.

COB is the official repository of County records and provides administrative support to the Board of Supervisors, the governing boards of certain districts and authorities and the Assessment Appeals Boards and Hearing Officers. The majority of its functions are defined and mandated by various California Statutes, Revenue and Taxation Codes, County Ordinances, Board Resolutions, County Rules of Procedure and by Board of Supervisors' policy.

The Clerk of the Board Department is ever changing in our efforts to provide and improve its service to the citizens of Orange County, as reflected in our Mission Statement: to provide the County and its citizens easy access to information, and guidance in order to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

As always, we look forward to serving Orange County.

Sincerely,

Susan Novak

Clerk of the Board

Did you know...?

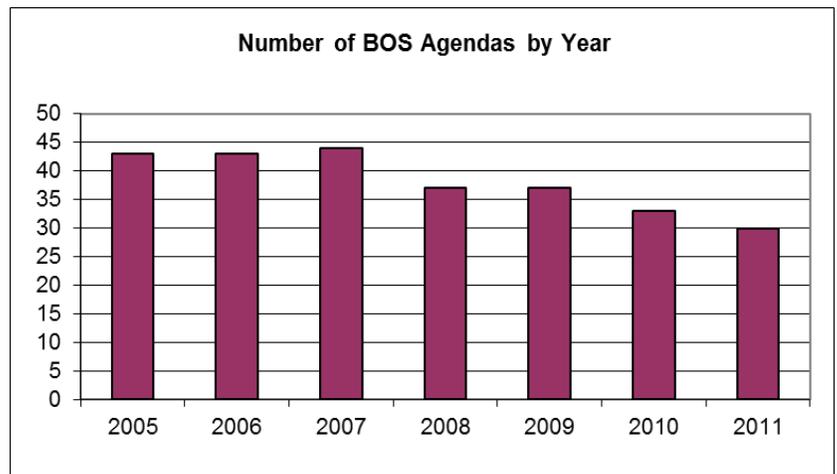
- The Clerk of the Board provides HR & payroll services for 75 Elected Officials and County staff members from 7 different departments – Clerk of the Board (COB), 5 Board of Supervisors (BOS) Offices and Office of Performance Audit Director.
- In addition to the BOS, COB prepares agendas, supplemental agendas and minutes and manages records for the Children & Families Commission and their subcommittee, the IHSS Advisory Committee and the Orange County Community Corrections Partnership.
- COB has processed over 900 contracts and over 600 resolutions for the Children & Families Commission since its inception.
- COB provides support to Ad Hoc Committees such as Redistricting and County Charter.
- COB maintains the Conflict of Interest (COI) filings of approximately 3500 individuals and receives approximately 5000 filings annually (annual, assuming and leaving office filings).
- On behalf of the Board of Supervisors, the COB is the COI code reviewing body for 174 different entities; and has processed 26 code amendments this past year.
- COB keeps track of the ethics training (AB1234) for approximately 450 individuals.
- COB is the official filing officer for the Rosters of Public Agencies for the County of Orange. We receive approximately 80 each year.
- COB processed 16,000 - 19,000 property assessment appeals annually the past 3 years. That's a workload increase of 250%, from the prior average filings of 7500.
- The COB held 13 workshops this past year to assist homeowners in preparing for their assessment appeals hearing, often having to turn homeowners away due to lack of space.

The Board Services Division prepares and publishes agendas and minutes for the Board of Supervisors and other authorities in accordance with legal requirements for public meetings; processes legal publications; administers oaths of office for various elected and appointed officials; administers the County's Conflict of Interest Code Review and Filing Program requirements and acts as filing officer/official for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County; maintains official rosters of Boards, Commissions and Committees and posts vacancy notices; and in 2011 began administering lobbyist registrations.

The following are examples of some of the COB daily activities:

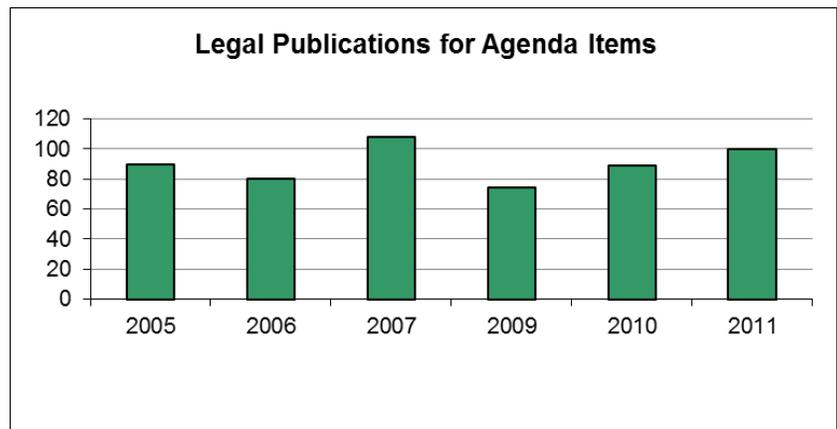
Number of BOS Agendas per year

The Clerk of the Board prepares agendas, summary action minutes (SAMs) and supplemental agendas for all regular and special Board of Supervisors' meetings. While the BOS has reduced the number of meetings held each year, the volume of agenda items per meeting has increased.



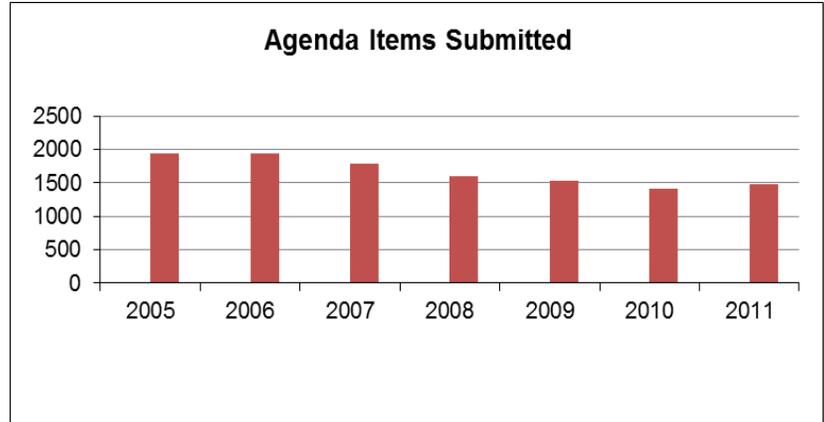
Legal Publications for agenda items

COB publishes legal and other notices as required for agenda items for County Agencies/Departments. Having COB complete this task, helps to lessen errors and potential lawsuits. Examples of published items include public hearings, ordinances and bid openings.



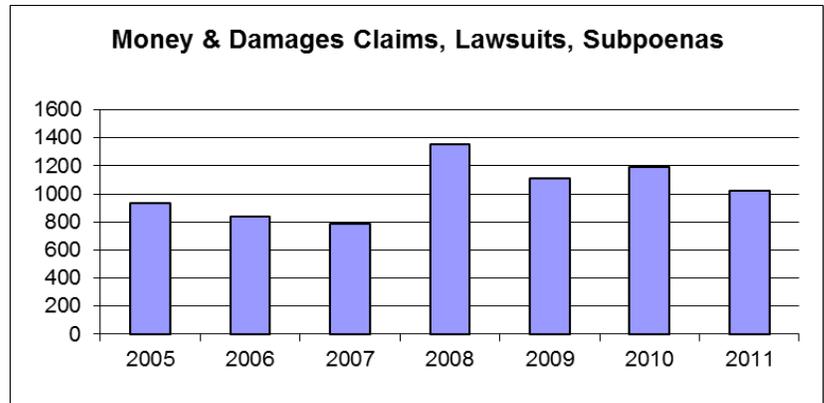
Agenda Items submitted

This includes creating a title for each item that meets Brown Act requirements; ensuring all required documents, approvals and needed recommended actions are submitted; providing all documents for public review in our office and online; and after Board action, preparing minute orders and processing any agreements, resolutions or ordinance changes.



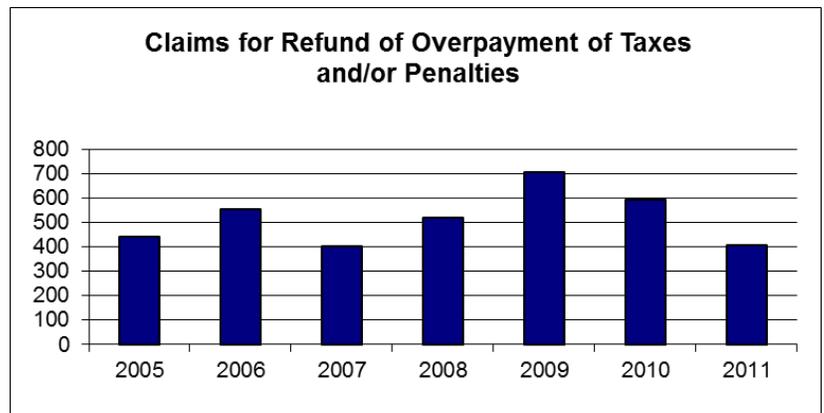
Money & Damages Claims, Lawsuits and Subpoenas

COB is the central location for claims against the County to be served. Over the last 4 years we have received over 1000 claims, lawsuits and subpoenas each year.



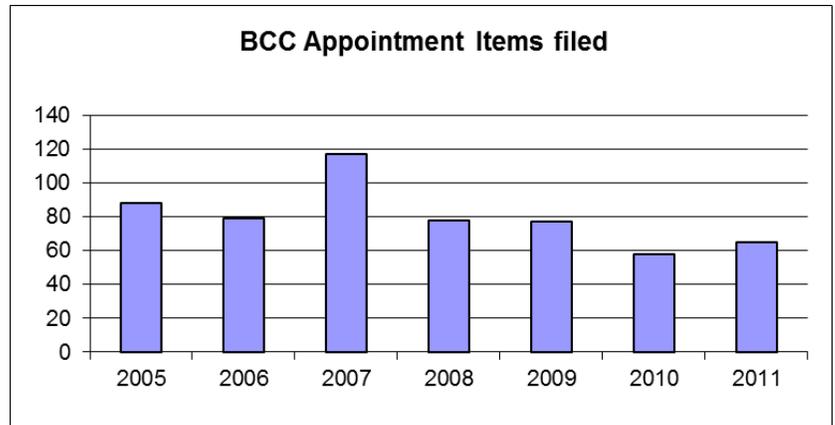
Claims for Refund of Overpayment of Taxes and/or Penalties Paid

COB also receives all requests for refund of tax claims. When a tax payer feels a penalty for late payment was applied to their property in error or when they believe they have overpaid their property taxes (for example a double payment), they are able to file a claim for refund. Over the last few years we have received 400 to 700 claims each year.



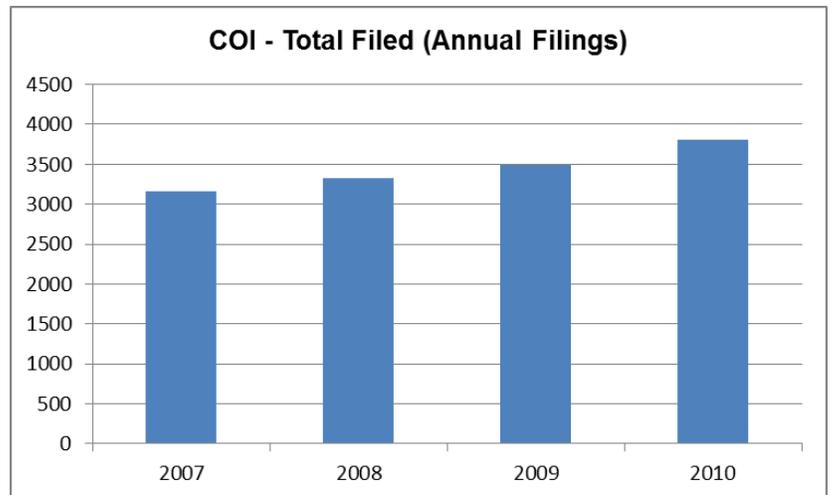
Boards, Commissions & Committees (BCC)
Appointment Items Filed

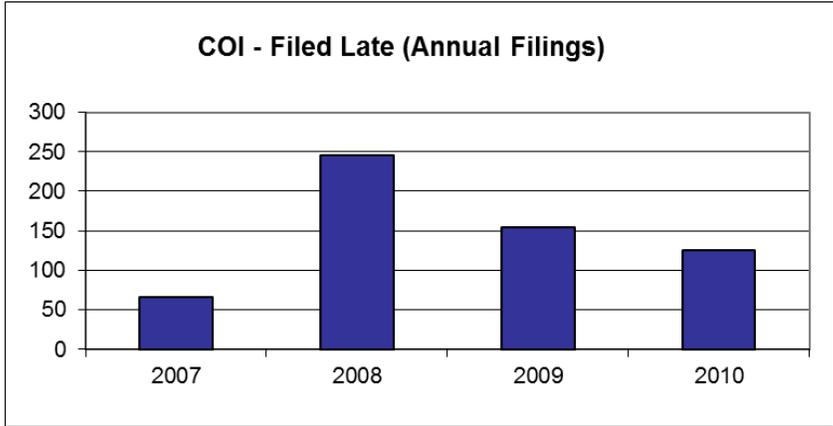
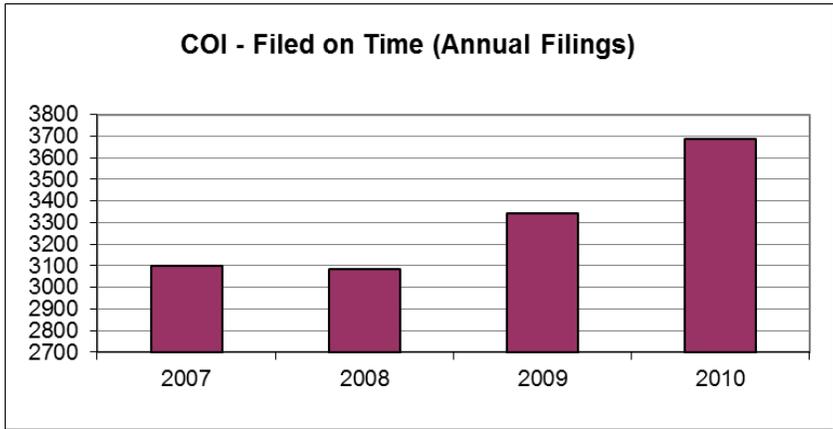
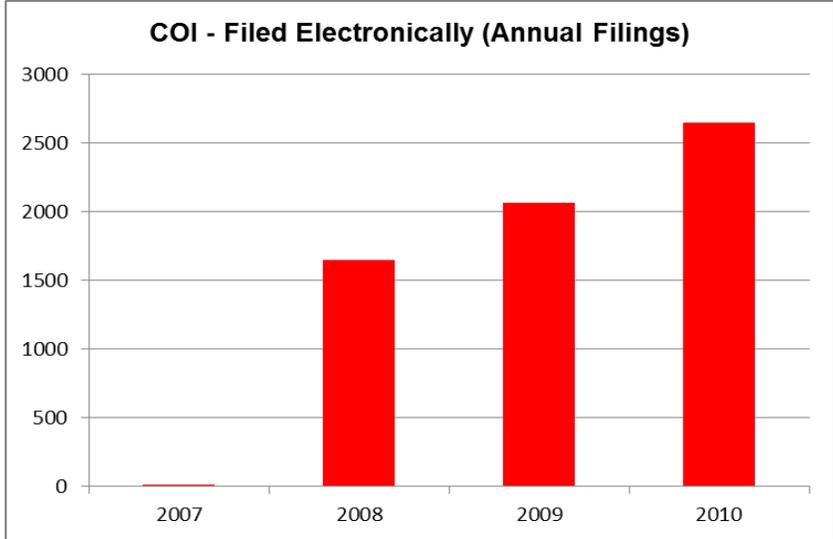
COB maintains a database listing of all BCC information. After each appointment is made by the BOS, COB sends the new or reappointed BCC member a packet which includes a Certificate of Appointment and any forms they will need such as an Oath of Office card and/or Form 700. Each year COB receives over 60 appointment/reappointment requests from Board Offices and County Departments/Agencies. COB will also attend BCC meetings to swear-in new members upon request.



Conflict of Interest Filings

COB maintains the Conflict of Interest (COI) filings of approximately 3500 individuals and receives approximately 5000 filings annually. On behalf of the Board of Supervisors, the COB is the COI code reviewing body for 174 different entities; and has processed 26 code amendments this past year. Beginning in 2007, COB has participated in a pilot project for electronic filing. In addition to the workload reduction for COB, it has also resulted in more filings submitted on time and with fewer errors.

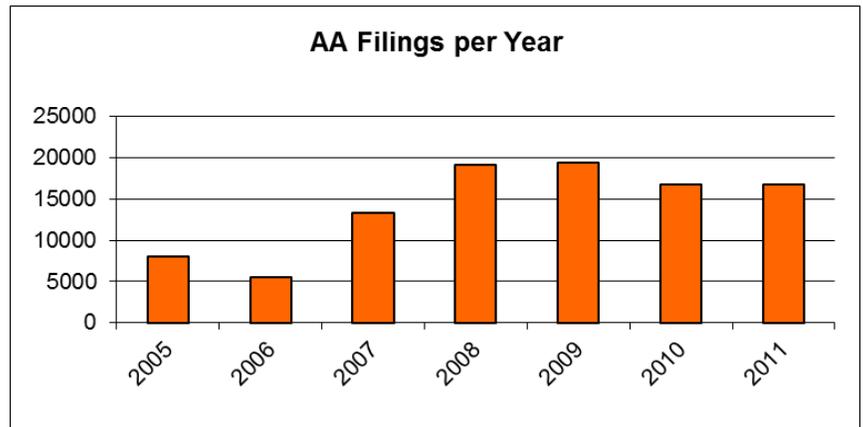




The Assessment Appeals Division receives and processes assessment appeals applications; schedules hearings and publishes annual notices in accordance with legal requirements; maintains minutes and official records of the assessment appeals process; provides assistance and education to the Assessment Appeals Board Members and public on the assessment appeals process; and works with the State Board of Equalization to ensure quality mandated training for new Assessment Appeals Board members and development of regulations that compliment Orange County's process.

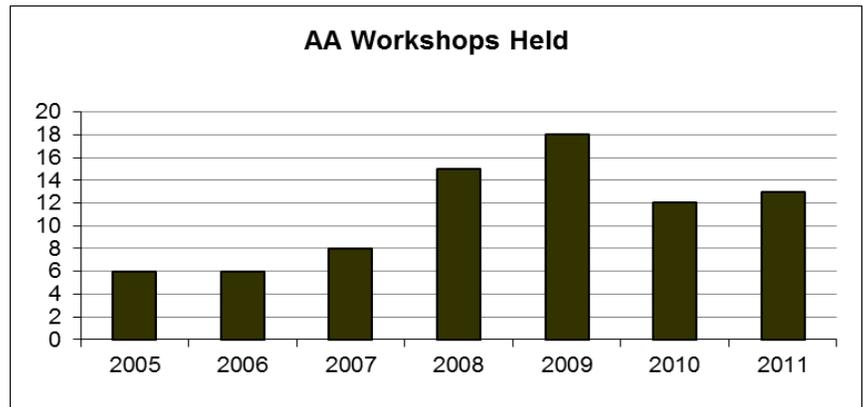
Assessment Appeals Filings per Year

Clerk of the Board receives all assessment appeals filed by Orange County property owners. The number of appeals filed began increasing dramatically in 2007 with 16,000 – 19,000 filings each year since then. This amounts to an increase in workload of 250%.



Assessment Appeals Workshops Held

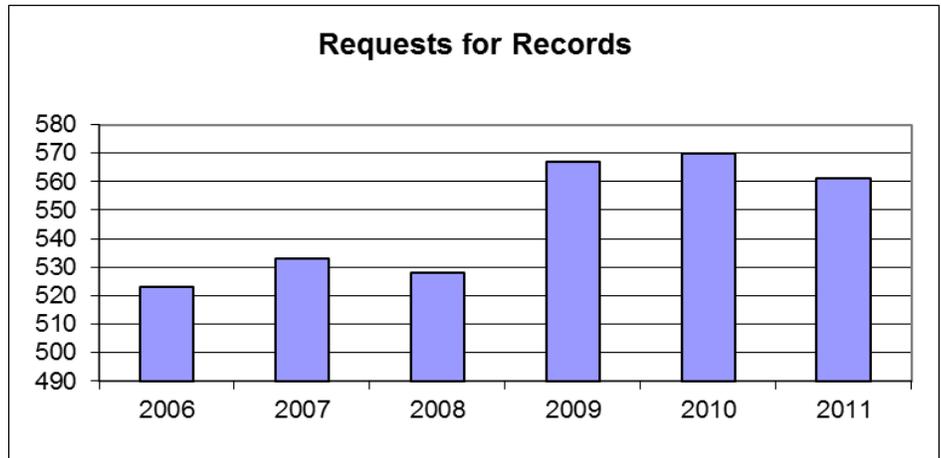
As a result of the increase in assessment appeals filings we have increased our workshops held in the community. Following a presentation, our workshops give applicants the opportunity to ask questions of COB staff while learning how to properly prepare for their hearing. When applicants are prepared for their hearings it allows the hearing to run much smoother and avoids unnecessary continuances.



The Files Management & Administrative Services Division manages the department's official records; responds to public records requests; assists the public and County departments/agencies with research of records; provides support to various County Commissions and Committees, provides payroll, purchasing and personnel services to COB, the Office of Performance Audit Director and Board Offices; provides information systems support for Countywide systems and Clerk of the Board staff; and retrieves and certifies documents for court.

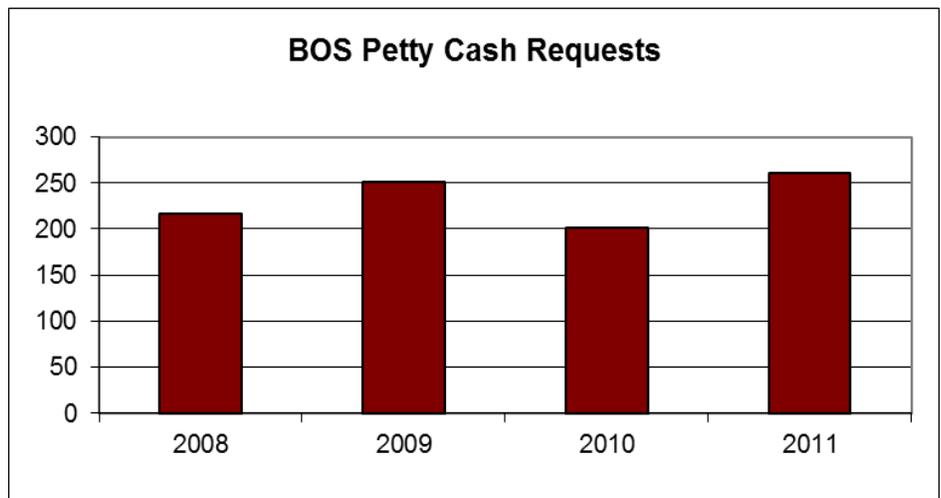
Requests for Records

COB receives requests for County BOS and Assessment Appeals records. We receive over 500 requests per year via letter, email, phone and walk-ins. Many requests require several hours or even days of research by our staff.



BOS Petty Cash Requests

Our office processes petty cash requests from all 5 Board offices. Petty cash can be used for allowable expenses that are not covered by a County contract. Common examples are magazines, conferences and community events.



Work Orders for all BOS & COB Offices

Clerk of the Board staff submits work orders for facility and telephone issues on behalf of COB and the Board Offices. This often requires defining the problem or request and then coordination with OC Public Works or Telephone Services.

