COUNTY OF ORANGE

PUBLIC ADMINISTRATOR

&

OC PUBLIC GUARDIAN

2012 BUSINESS PLAN UPDATE



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PUBLIC ADMINISTRATOR – PUBLIC GUARDIAN DEPARTMENT 2012

It is my pleasure to present the Orange County Public Administrator – Public Guardian Department's 2012 Business Plan Update. This update is a combined update to the Public Administrator/Public Guardian 2010 Business Plan. Since the 2010 plan was developed, the Public Administrator/Public Guardian Department was re-organized into two Departments, the Public Administrator and the OC Public Guardian (effective July 1, 2011). Future business plans will be issued separately for each Department.

The men and women of our department look forward to serving the people of Orange County this next year and welcome the opportunity to demonstrate the outstanding work our team provides.

Our dedicated employees are committed to improving the lives of our clients, managing their affairs, protecting decedent assets and assisting families who are coping with the loss of their loved ones. I encourage you to read our Business Plan Update and visit our website for more information about our department and the services we provide.

Lucille Lyon
Public Guardian/Assistant Public Administrator
http://papg.ocgov.com/public/

PERFORMANCE MEASURES UPDATE

CORE SERVICE AREA: PUBLIC ADMINISTRATOR

Goal #1: (Public Administrator) Timely and effectively protect and administer decedent estates when there are no other viable persons or entities to administer the estates as mandated pursuant to California Probate Code sections 7601-7624.

Strategies to Meet Goal #1:

- Continue to evaluate and improve the Public Administrator's methods for proactively identifying property that is subject to loss, injury, waste or misappropriation and develop procedures that initiate more proactive involvement.
- Continue to evaluate and improve the methodology and tools available for identifying decedent estate property and heirs.
- Monitor the acceptance and administration of decedent estates to ensure compliance with Court required Inventory and Appraisals, Court Accountings, and processing of creditor's claims

Performance Measure: Referred Public Administrator Case Closures

What: Percentage of Public Administrator cases closed within 24 months Why: Measures the efficiency of investigating and administering estates

FY 09-10 Results	FY 10-11 Plan	FY 10-11 Anticipated Results	FY 11-12 Plan	How are we doing?
90%	95%	95%	85%	Compliance with achieving case closure has improved due to improvements in the timely completion of Inventory and Appraisals and processing of Court Accountings. However, market conditions slowed the sale of real property and therefore impacting case closure rate.

Performance Measure: Heir Searches by Public Administrator

What: Percentage of referred cases resulting in successful heir searches by Public Administrator

Why: Measures the success of locating decedent estate heir or beneficiaries

FY 09-10 Results	FY 10-11 Plan	FY 10-11 Anticipated Results	FY 11-12 Plan	How are we doing?
99%	99%	99%	99%	Continued use of expanded heir search systems maintains success rate

CORE SERVICE AREA: PUBLIC GUARDIAN

Goal #2: Compassionately and efficiently serve as the conservator of persons and estates for individuals placed under our jurisdiction pursuant to the LPS act or provisions of the Probate Code Section 1800 et.seq.

Strategies to Meet Goal #2:

- For clients placed under conservatorship pursuant to the LPS act, the conservator will obtain and monitor the provisions of the individualized mental health plan.
- Clients placed under a conservatorship pursuant to the Probate Code, will receive a needs assessment to determine the appropriateness and extent of the conservatorship.
- Conduct Targeted Case Management (TCM) services to assist conservatees, eligible under the State Plan, in gaining access to needed medical, social, educational and other services.
- Continue to provide information to the general public concerning the role of Public Guardian and the services they provide.

Performance Measure: Administrative Deputy Caseload - LPS

What: Obtain and monitor implementation of the individualized mental health treatment plan.

Why: The legislative intent of the LPS act is to ensure a conservatee placed under an LPS conservatorship has an individualized mental health plan designed to help the conservatee achieve recovery.

FY 11-12 Plan		How are we doing?
90%		Goal was first established in
compliance		calendar year 2012

Performance Measure: Administrative Deputy Caseload - Probate

What: Conduct a "needs-based assessment" to determine the needs of the conservatee and set goals for increasing the conservatee's functional ability to whatever extent possible.

Why: Conducting a "needs-based assessment" and using this assessment promotes accessing community based services.

FY 11-12 Plan			How are we doing?
90%		Goal was first established in	
compliance			calendar year 2012

CORE SERVICE AREA: ADMINISTRATION AND WORKFORCE

Goal #3: (Department wide) Continue to maintain a qualified, effective and efficient workforce.

Strategies to Meet Goal #3:

- Review, develop, and update the Departmental Policy and Procedure Manual to provide the fiduciary infrastructure of the agency.
- Review the internal business processes to improve efficiency.
- Continue to implement the ongoing Public Administrator/Public Guardian deputy certification requirements of the Jones Bill (AB 1363) by scheduling staff to participate in on-site, on-line and off-site training.

Performance Measure: Deputy Certification Requirements

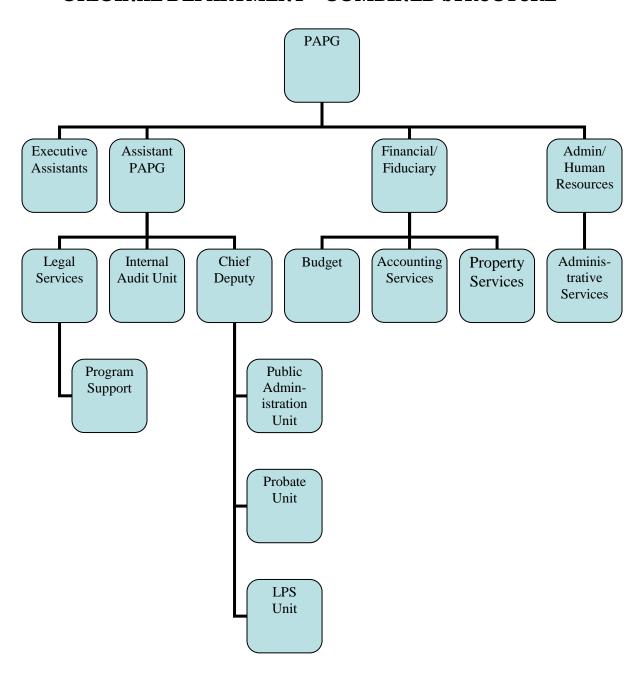
What: Percentage of Deputies in compliance with training certification requirements

Why: Deputy certification is required per the Jones Bill (AB 1363)

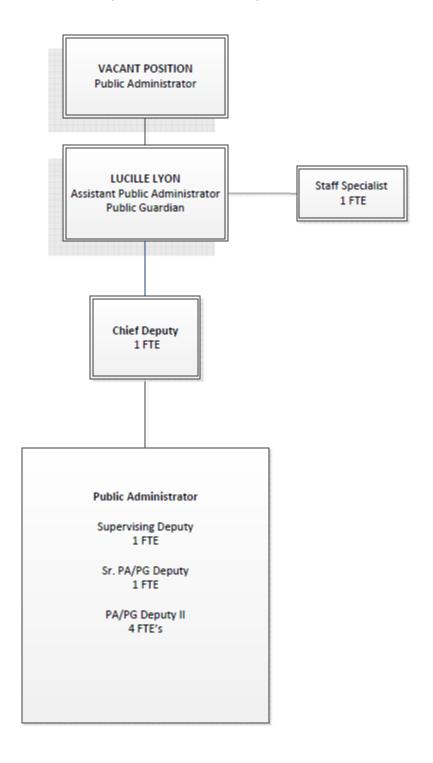
FY 09-10 Results	FY 10-11 Plan	FY 10-11 Anticipated Results	FY 11-12 Plan	How are we doing?
100%	100%	100%	100%	The Department continues to provide internal training and participate in Public Administrator/Public Guardian Association, Professional Fiduciary Assoc. of California, and National Guardianship Association Training/Conferences.

APPENDIX A **ORGANIZATIONAL CHARTS**

ORIGINAL DEPARTMENT - COMBINED STRUCTURE



PUBLIC ADMINISTRATOR - NEW DEPARTMENT STRUCTURE (Effective 7/1/2011)



OC PUBLIC GUARDIAN - NEW DEPARTMENT STRUCTURE (Effective 7/1/2011)

