

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.

"Where service and information are at your fingertips"

Clerk of the Board of Supervisors Business Plan 2012 – Performance Measures Update

#### Clerk of the Board of Supervisors



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**Darlene J. Bloom, CCB** *Clerk of the Board* 

January 2012

Dear Readers:

We are pleased to present the Orange County Clerk of the Board's Business Plan 2012 – Performance Measures Update.

The Clerk of the Board measures success in public outreach, accuracy, meeting statutory deadlines, and in customer satisfaction.

The Clerk of the Board 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, 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 ensure 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,

Darlene J. Bloom Clerk of the Board

## **PERFORMANCE MEASURE:** Percent of Accurate Agenda Titles

WHAT: Measurement of COB's accuracy and training.

**WHY:** This measurement assesses the COB's quality and accuracy in preparing the agenda in compliance with Brown Act requirements, and identifies areas and issues that require training for staff in COB and County agencies/departments.

FY 10-11 Results	FY 11-12 Plan	FY 11-12 Anticipated Results	FY 12-13 Plan	How are we doing?
97.7%	96%	96%	96%	COB will have a difficult time maintaining our previous low error rate due to more aggressive tracking and reporting of errors, additional work load and loss of two positions.

**PERFORMANCE MEASURE:** Percent of Accurately Completed and Timely Filed Assessment Appeals Applications\*

WHAT: Indicator of taxpayers' and agents' understanding of applications and process.

**WHY:** This measurement assesses the success of the COB's training and outreach efforts to the public and tax agents and the use of our website and online e-file application.

FY 10-11 Results	FY 11-12 Plan	FY 11-12 Anticipated	FY 12-13 Plan	How are we doing?
		Results		
91.3% for 2010	85%	85%	85%	Numbers
filing year				reflect success
				of COB's
82% for 2011				outreach efforts
filing year (still				and online e-
in progress)				form.

<sup>\*</sup> Assessment Appeals Statistics measured for filing year (July 2<sup>nd</sup> – July 1<sup>st</sup>).

**PERFORMANCE MEASURE:** Percent of Assessment Appeal Claims Decided or Waived Within Two-Year Deadline\*

**WHAT:** Indicator of success managing caseload to ensure required actions are taken before legal deadline.

**WHY:** This measurement assesses whether the cob's current policies and procedures and staffing levels result in processing all appeals within the statutory deadline.

FY 10-11 Results	FY 11-12 Plan	FY 11-12 Anticipated Results	FY 12-13 Plan	How are we doing?
99.9% for 2009 filing year 72% for 2010 filing year (year 2 still in progress)	100%	100%	100%	Meeting anticipated goal due to quality tracking of database information and appeals even though filings increased 400% from just a few years ago.

<sup>\*</sup> Assessment Appeals Statistics measured for filing year (July 2<sup>nd</sup> – July 1<sup>st</sup>).

**PERFORMANCE MEASURE:** Percent of Assessment Appeals Hearings Held or Scheduled Within One Year Of Filing\*

WHAT: Indicator of efficiency in processing and scheduling appeals.

**WHY:** This measures the COB's success in meeting its customer service goal and guidance of 2nd year protective filing.

FY 10-11 Results	FY 11-12 Plan	FY 11-12 Anticipated Results	FY 12-13 Plan	How are we doing?
3.4% for 2011 filing year (as of 12/9; still in progress; filing period finished 9/15/11)	75%	65%	65%	With 4 straight years of increased filings, COB will not be able to handle all appeals within one year.
60.5% for 2010 filing year				

<sup>\*</sup> Assessment Appeals Statistics measured for filing year (July 2<sup>nd</sup> – July 1<sup>st</sup>).

**PERFORMANCE MEASURE:** (Assessment Appeals Public Workshop Outreach) Percent of Attendees Who Agreed Workshop Was Overall Satisfactory - Results of Customer Satisfaction Surveys.

WHAT: Measurement of success in meeting clients' needs.

**WHY:** The results assess the COB's success in meeting the needs of its customers in a professional and courteous manner and ensuring that property owners come to their hearing prepared so that the appeal can be concluded in a single hearing.

FY 10-11 Results	FY 11-12 Plan	FY 11-12 Anticipated Results	FY 12-13 Plan	How are we doing?
97.1%	95%	95%	95%	Overall COB has received favorable ratings from over 97% of respondents over past several years. Number of workshops increased to meet the high volume of appeals received.

**PERFORMANCE MEASURE:** Results of Customer Satisfaction Surveys (COB Department).

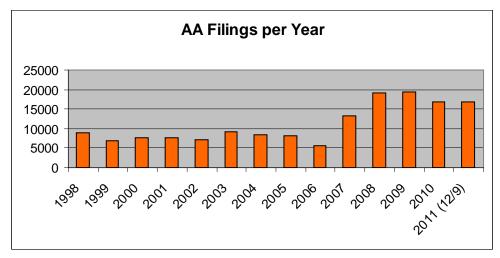
**WHAT:** Measurement of success in meeting clients' needs.

**WHY:** The results assess the COB's success in meeting the needs of its customers in a professional and courteous manner.

FY 10-11 Results	FY 11-12 Plan	FY 11-12 Anticipated Results	FY 12-13 Plan	How are we doing?
100%	100%	100%	100%	Overall COB has received favorable ratings from respondents over past several years. We continue to explore ways of improving service to our clients.

### Assessment Appeals Filings per Year

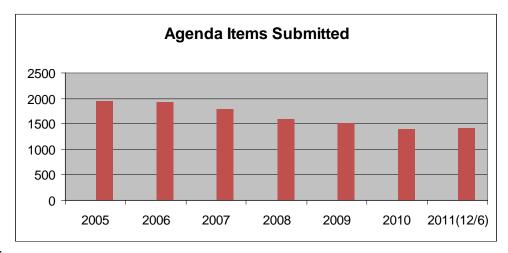
Clerk of the Board receives all assessment appeals filed by Orange County property owners. The number of 2010 year appeals filed was 16,797. This year the appeals are estimated to be over 18,000. Over the past few years, COB has seen a dramatic increase in filings due to economic conditions resulting in a general decline in property values.



\*2011 in progress

### **Agenda Items Submitted**

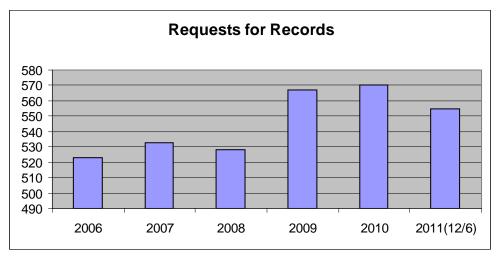
COB processes on average over 1500 agenda items each year for the BOS meetings. This includes creating titles and reviewing each item for completeness; distributing agenda items to all Board Offices, CEO, Grand Jury and County Counsel; creating a minute order for each item; processing contracts, resolutions, and ordinances and distributing to departments; and preparing each item for scanning.



\*2011 in progress

### **Requests for Records**

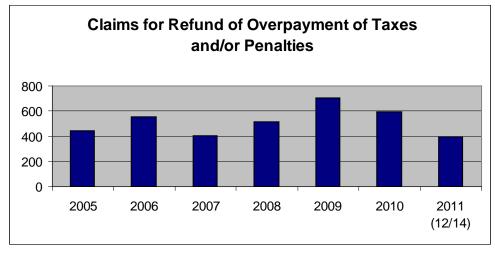
COB receives requests for County BOS records. We receive over 500 requests per year via letter, email, phone and walk-ins. Many requests require several hours or even days of research by our staff. Requests submitted under the Public Records Act have statutory deadlines for response.



\*2011 in progress

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

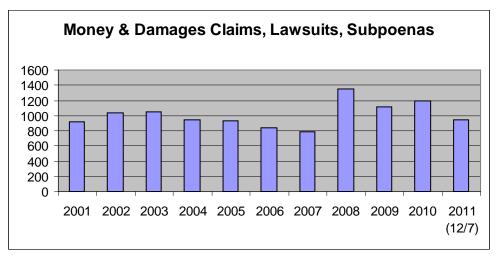
COB also receives all requests for refund of tax claims. When a tax payer feels a penalty for late payment was applied to their property in error or when they feel they have overpaid their property taxes (double payment or an error), they are able to file a claim for refund. COB receives hundreds of claims each year and received over 700 in 2009. COB manages this process and provides the tax payer with claim results.



\*2011 in progress

## Money & Damages Claims, Lawsuits and Subpoenas

COB is the central location for claims against the County to be served. Over the last few years we have received over 1100 claims, lawsuits and subpoenas annually.



\*2011 in progress

# Did you know...?

- 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.