

COUNTY OF ORANGE
PUBLIC ADMINISTRATOR
PUBLIC GUARDIAN



John S. Williams
Public Administrator/Public Guardian

2011 BUSINESS PLAN UPDATE



TABLE OF CONTENTS

Transmittal Letter	2
Performance Measures Update	3
Operational Plan	4

APPENDICES

A. Organizational Chart	7
-------------------------	---



PUBLIC ADMINISTRATOR – PUBLIC GUARDIAN
DEPARTMENT
2011

It is my pleasure to present the Orange County Public Administrator – Public Guardian Department's 2011 Business Plan Update. 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.

John S. Williams

Public Administrator – Public Guardian – Public Conservator

<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 7601-7604.

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.
- Continue to educate the general public and stakeholders concerning the role of the Public Administrator in the location and protection of estate assets.
- Continue to evaluate and improve procedures that enable the Public Administrator to communicate with outside organizations regarding estate administration, including but not limited to, the Court System, Federal and State tax authorities, and other City, County, State and Federal agencies.

Performance Measure: Referred Public Administrator Case Closures

What: Percentage of Public Administrator cases closed within 24 months

Why: Measures the efficiency of 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%	92%	Use of expanded heir search systems and ongoing staff training has improved closed case results. Market conditions for the sale of real property have impacted case closure.

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 heir searches

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 ADMINISTRATOR

Goal #2: (Public Guardian) Compassionately and efficiently serve as the conservator of persons and estates until viable alternatives are available or the person is no longer a danger to themselves or others as mandated pursuant to California Probate Code section 2920 and California Welfare and Institutions Code section 5352.

Strategies to Meet Goal #2:

- Continue to meet routinely with the judge presiding over mental health related hearings, the Public Defender's Office, and mental health personnel to maintain the effective structure of LPS court hearings.
- Continue to evaluate the methodology and tools available for identifying conservatee property and family.
- Continue to provide information to the general public concerning the role of Public Guardian in the protection of exploited or neglected residents.
- Continue to assess all elderly LPS conservatees suffering from some form of dementia that should be converted to Probate conservatees and evaluate the steps necessary to effectively allow the conversion.
- Continue to train deputies and staff concerning the administration of the new Medicare Part D prescription drug program and evaluate the staff resources required to administer the program to determine the most efficient method of administration.
- Continue to monitor the federally administered Targeted Case Management Medi-Cal program.

Performance Measure: Administrative Deputy Caseload - LPS

What: Average number of LPS Conservatees per Administrative Deputy

Why: Most effective caseload is between 75 and 80 cases per Deputy

FY 09-10 Results	FY 10-11 Plan	FY 10-11 Anticipated Results	FY 11-12 Plan	How are we doing?
75	77	75	78	Budget constraints may result in increased caseloads

Performance Measure: Administrative Deputy Caseload - Probate

What: Average number of Probate Conservatees per Administrative Deputy

Why: Most effective caseload is between 45 and 60 cases per Deputy

FY 09-10 Results	FY 10-11 Plan	FY 10-11 Anticipated Results	FY 11-12 Plan	How are we doing?
68	65	65	63	Budget constraints may result in increased caseloads. An increase in the senior population is resulting in more elder abuse referrals.

CORE SERVICE AREA: ADMINISTRATION AND WORKFORCE**Goal #3: (Department wide) Continue to maintain a qualified, effective and efficient workforce.**

Strategies to Meet Goal #3:

- Continue to research and review electronic storage system solutions to establish paperless storage capacity for PAPG records management. Due to internal and external policies and mandates, the Public Administrator/Guardian is required to store case related documents for six (6) years. Current storage capacity is limited and electronic storage systems may provide effective means of storing, accessing, and managing case files in accordance with mandates.
- Continue to research and develop pilot programs for Public Administrator/Public Guardian investigative deputies to utilize technological advances with remote access to enable deputies to operate more efficiently.
- 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.
- Continue efforts to replace the current ePages case management and accounting computer database through 2011.
- Continue to evaluate new resources for the sale of real property, including online auction sites.

- Continue to evaluate and improve the efficiency of current estate asset inventory methods, determine and implement procedures that will expedite and streamline the process.

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%	In-house training program has been instrumental in achieving compliance

APPENDIX A
ORGANIZATIONAL CHART



