

FORM 701 Statement of Work

Clerk of the Assessment Appeals Board
Combining Judicial Support Services
Santa Ana, CA 92702-6000
714.251.1111 • FAX 714.251.0117
Pat Manning
Team Manager

AGENDA STAFF REPORT ASR Control 10-000406

Agenda Item

DATE: 01/23/11

ACTION: Board of Supervisors

BY: All Districts

OF THE BOARD: Clerk of the Board

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 B
Santa Ana, CA 927

Certificate of Appointment-Oath/Affirmation

STATE OF CALIFORNIA,
County of Orange

I, _____ County of Orange, State of California
(Department Head's Name)

BID OPENING SCHEDULE
2010 UPCOMING

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”

2010 Clerk of the Board Business Plan

“Where service and information are at your fingertips”

CLERK OF THE BOARD OF SUPERVISORS

333 W. Santa Ana Blvd., Suite 465
Santa Ana, CA 92701
(714) 834-3453 ** FAX (714) 834-4439

Darlene J. Bloom, CCB

Clerk of the Board

January 2010

Dear Readers:

We are pleased to present the Orange County Clerk of the Board's 2010 Business Plan.

The Plan provides the focus and direction of our office for the upcoming year. The Department's mission and goals for this upcoming fiscal year will be accomplished with the hard work and commitment of all Clerk of the Board staff. It is truly a cooperative team effort.

The Clerk of the Board Department is ever changing in our efforts to provide and ensure its service levels 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.

I encourage you to read our Plan. As always, we look forward to serving Orange County.

Sincerely,

Darlene J. Bloom
Clerk of the Board

*The People of the Office of the Clerk of the Board
Our Most Valuable Resource*



Darlene J. Bloom
Susan Novak
Sonia Acuna
Joanna Aguilar
Ruben Aguilar
Lydia Archuleta
Van Au
Bill Bauer
Maria Carrillo
Anita Davis

Ronald Galang
Olivia Galvan
Sandra Haro
Bev Iorio
Richard Larsen
Maria Lopez
Dora Martinez
Pat Martinez
Susan Morales
Bonnie Mura

Irene Muro
Hieu Nguyen
Nancy Pham
Christine Robinson
Jamie Ross
Najeeb Siddiqui
Robin Stieler
Helen Suarez
Debra Troeak
Ofelia Velarde-Garcia

Ronald Galang – 2009 Employee of the Year (Shining Star)

“Where service and information are at your fingertips”

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I. EXECUTIVE SUMMARY

The Clerk of the Board's 2010 Business Plan presents a high level overview of the services the department provides, FY 08/09 major accomplishments, goals for FY 10/11, strategies and projects to achieve those goals, and critical service issues.

The Clerk of the Board (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 and Ordinances, County Rules of Procedure and by Board of Supervisors' policy.

The department is comprised of three major divisions:

Board Services which prepares and publishes agendas and minutes for the Board of Supervisors, 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 receives and processes claims, summons and complaints against the County; Assessment Appeals which 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 and provides assistance and education to the Assessment Appeals Board Members and public on the assessment appeals process; and

Files Management & Administrative Services which manages the department's official records, responds to public records requests, assists the public and County departments/agencies with research of records, provides payroll, purchasing and personnel services to the Department and Board offices, and provides information systems support for Countywide systems and Clerk of the Board staff.

The Clerk of the Board's commitment to providing the highest level of professional and courteous service possible to the Board of Supervisors, County departments/agencies, officials and citizens it serves is reflected in our Mission Statement:

"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."

2008/09 Overview & Critical Issues

The past three years the Clerk of the Board has placed considerable emphasis in managing the dramatic increase in assessment appeals filed due to the economic recession and housing market decline. We have encountered an approximate 400% increase in the number of appeals filed over the past three years. Although we have seen some indications of recent market stabilization these past couple of months, we are a long way from processing the increased volume of appeals received over the past three years. We continue to look at processing alternatives and have, in cooperation with the Assessor, implemented new, creative ways of processing higher volumes of appeals. Assessment appeals will continue to be on the forefront of issues facing the Clerk of the Board over the next couple of years.

Another area that we have placed considerable effort is in streamlining the Conflict of Interest Filing Officer/Filing Official responsibilities. The Board of Supervisors is the code reviewing body for 163 different entities. The review process has been difficult as entities have submitted their codes and amendments in a variety of different methods. This has made the review process very cumbersome and time consuming for both the Clerk of the Board and for the entity requesting the amendment. New automation developed by the Clerk of the Board will enable quick review and tracking of code amendments once all entities are utilizing the same standardized method of reporting. This undertaking will take a couple of years to fully implement but will enable easy to submit, review and approve code amendments and will also enable accurate tracking of filers. Additionally, filers will be able to take advantage of online e-filing of their Form 700.

The Clerk of the Board continues to make improvements to its website to increase accessibility of information and e-services. Orange County Clerk of the Board continues as a national leader in its innovative approaches to service, automation techniques and 24/7 e-commerce information, opportunities and solutions.

Department forms, Board agendas, minutes and bid schedules are available online to the general public. The public can view live streaming video of live and past Board meetings, as well as submit comments online on items being considered by the Board. The Department continues to expand its efforts to meet the ever changing service needs of its customers.

The main challenge is of course sustaining adequate staffing resources to handle the current mandatory workload. The loss of 2 positions in COB at the beginning of FY 09-10 was extremely detrimental. Remaining COB staff had to take on additional work in order to keep up with our services. In addition, the loss of AB 589 funds to help supplement the increase in appeals will again, require budget augmentations to continue this and other mandatory services.

II. AGENCY OVERVIEW

Vision Statement

“To ensure the integrity of County services and provide innovative access to records and information.”

Mission Statement

The COB’s Mission Statement reflects our commitment to providing the highest level of service possible to the Board, officials and citizens we serve:

“The mission of the Clerk of the Board of Supervisors is 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.”

Core Services that Achieve County Mission and Strategic Objectives

The 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 COB’s Core Services are:

- Access to County official public records and information
- Facilitate open participation in the Board of Supervisors’ meetings
- Facilitate a fair and equitable local Board of Equalization process
- Our Workforce

Access to County official public records and information:

Our Files Management and Administrative Services division provides copies of all records, including current and historical, that the COB is required to maintain; assists other departments, entities and the public with research and retrieval of

information; retrieves and certifies documents for court; and researches and processes all public records requests.

Our Assessment Appeals division provides assistance and education to the general public on the assessment appeals process.

Board Services provides the public with information on current Board of Supervisors' meetings and acts as filing officer/official for Statement of Economic Interest forms.

Facilitate open participation in the Board of Supervisors' meetings:

Our Board Services division prepares and publishes agendas for Board of Supervisors (BOS) and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the BOS; maintains official rosters of Boards, Commissions and Committees and posts vacancy notices; and processes legal publications, postings and notices.

Facilitate a fair and equitable local Board of Equalization process:

Our Assessment Appeals division receives and processes assessment appeal applications; schedules and publishes hearings in accordance with legal requirements; maintains minutes and official records of 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.

Our Workforce:

In addition, the COB encourages the promotion of personal and professional growth of our staff. We will continue to conduct and implement new ways to help build department cohesiveness by many of the strategies listed below:

Development of Department Succession Strategies.

Encourage career development opportunities/higher education.

Conduct annual off-site (when budget allows) and quarterly meetings for all COB staff.

Work with corporate HR to continue to ensure appropriate employee classifications.

Search for a central location for Assessment Appeals staff/all staff.

Provide support and training to supervisors and staff for Performance Incentive Plan and Management Pay for Performance Plan.

Employee Recognition Program (Shining Star, TEAM Award, etc.).
Sharing of computer-related information with staff through email tips,
newsletters and training sessions.
Maintain and enhance departmental policies and procedures desk manual.

III. OPERATIONAL PLAN

Overview

The focus of the COB's 2010 Business Plan, is in continuing implementation of new and existing multi-year automation projects and in exploring options for greater public access through web-enabled automation. These improvements will ultimately result in streamlined and more efficient processes and more timely service to our clients, as well as enhanced public access and research capabilities.

The general public continues to have timely access to Board of Supervisors agendas, minutes, related agenda item documents, online commenting and audio access to past Board meetings as well as "live" streaming video of Board meetings.

In 2010, the COB will continue to focus on new and existing multi-year automation needs/projects. We went live with a new automation project to support online filing of Conflict of Interest (COI) form 700 for the approximate 5000 filings that we monitor each year. One of the aspects of COI is the review of the COI codes. The review process has been difficult as entities have submitted their codes and amendments in a variety of different methods. This has made the review process very cumbersome and time consuming for both the Clerk of the Board and for the entity requesting the amendment. New automation developed by the Clerk of the Board will enable quick review and tracking of code amendments once all entities are utilizing the same standardized method of reporting. This undertaking will take a couple of years to fully implement but will enable easy to submit, review and approve code amendments and will also enable accurate tracking of filers. This new automation will also track the mandatory Ethic Training requirements for various authority members and elected officials without the need for additional staff.

Another project is the continued development of a new Orange County Assessment Tax System (ATS) and Property Tax Management System (PTMS), which has been identified as a Strategic Priority for the County. The current system, which was developed over multiple phases from 1987 through 1999, does not adapt well to the change in business needs and is written in an obsolete language. As E-Commerce becomes a standard part of business operation, the ATS community (which includes the Assessor, Auditor-Controller, Tax Collector, and COB) has a need for more current technology and rapid development of software to support

mandatory business operations and statutory changes. 2004 was the first year of this multi-phased, multi-year development project.

Another major project within the office is the continued promotion of enhanced e-filing of assessment appeals applications. This tool provides greater public access to services, ensures accurate and complete form preparation and minimizes possible data entry errors. It expedites the period of time from filing to hearing and ultimate finalization of the application. Letters are automatically generated and sent via email, resulting in a cost savings for the County in reduced paper and postage.

As a cost savings whenever feasible, we will continue to collapse and combine assessment appeals hearings and hearing officer sessions thus decreasing the Board Member and Hearing Officer stipend costs. This savings will help defer the increased hearing costs, in light of our current decline in housing values and resulting increase in appeals.

With the enactment of SB555, the Board of Supervisors adopted a resolution making the Hearing Officer's decision the final administrative decision, eliminating the ministerial ratification by a full Assessment Appeals Board. This practice reduced the hearing time to applicants and expanded the County's processing time to meet the mandatory two year hearing deadline since there has been an influx of residential appeals filed due to the current declining housing market.

We will continue our efforts with the property tax administration departments in the database conversion project and visionary plan to provide a higher level of seamless 24/7 services to Orange County residents. The COB will, through educational outreach efforts, continue its successful taxpayer workshops that focus on evidence preparation for their hearing; participate in the Annual Small Business Tax Workshop; and work 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.

Environment

Clients

The clients of the COB are the Board of Supervisors, Assessment Appeals Board Members, the CEO, County Agencies/Departments, taxpayers and their representatives, cities and special districts, the State Board of Equalization, the public and the media. The highest priority needs of these clients are to have timely, accurate and user-friendly access to information and services. Streamlined and easily understood procedures for the various filings submitted to the COB are also a high priority to clients.

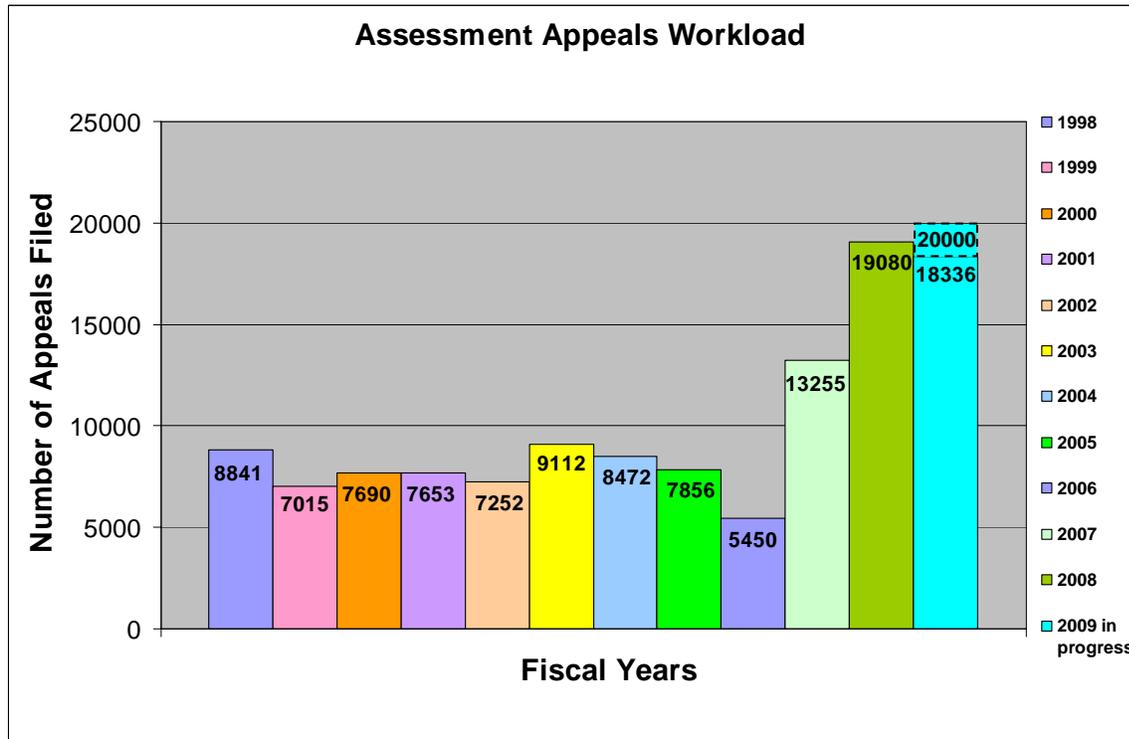
Challenges

As a small department, COB is dependent on outside vendors for development and maintenance of many automation products (i.e. e-Agenda, e-file COI and e-File assessment appeal). Our Information Systems division will continue to work closely with our outside vendors to ensure timely completion and accurate implementation of automation projects and with our users to ensure enhancements meet their needs.

The COB continues to take a proactive role in ensuring Orange County's interests are included/protected in any State legislation related to our office, as well as ensuring continued appropriate designation between County Clerk and Clerk of the Board in existing statutes and pending legislation for clarity.

The Assessor and the COB continue to watch the housing market carefully in an attempt to project future assessment appeal workloads. The recent decline in the housing market statewide has impacted our assessment appeal filings. We have encountered an approximate 400% increase in the number of appeals filed over the past three years. Although we have seen some indications of recent market stabilization these past couple of months, we are a long way from processing the increased volume of appeals received over the past three years. We continue to look at processing alternatives and have, in cooperation with the Assessor, implemented new, creative ways of processing higher volumes of appeals. Assessment appeals will continue to be on the forefront of issues facing the Clerk of the Board over the next couple of years. However, increases in Audit Escape filings, which are of a more complicated nature, often require multi-day pre-

conference hearings to resolve legal issues prior to the commencement of their valuation hearings.



In the past, the use of State Grant Monies (AB 589) has allowed the funding of two positions to handle the current workload over the past three years. This program has ended and no new funding has been allocated by the State. The COB will again require budget augmentations to maintain its current critical staffing levels. With continued automation efforts, we are positioned to handle a significant increase in workload with minimal disruption and increase in staffing and other resources.

AB 589 State grant funds were also able to fund one fulltime attorney position. This position has provided greater and consistent legal advice during the Assessment Appeals process. This highly regulated area of law is ever changing; thus, a higher level of training and counsel guidance for Assessment Appeals Board Members and Hearing Officers is necessary. The types of appeals filed today are significantly more complex and require longer hearing times and a greater level of expertise to ensure appropriate judgment and appraisal techniques are used to arrive at the correct value of property. Without this higher level of service, the County’s property tax roll could be in jeopardy and appeal decisions subject to increased litigation.

We will continue to work closely with the Property Tax Administration departments to monitor the economic and legislative influences to ensure appropriate department resources are provided to this program.

We continue to search for a central location for all COB staff to include the Assessment Appeals staff and hearing function. Although the COB is one of the smallest County departments, our offices are currently located in two separate buildings and three separate locations. It hampers the ability to provide management oversight, fully utilize staffing opportunities at peak workload periods, and weakens cross-training opportunities in a highly regulated program. Additionally, existing office sizes are smaller than standard and there is limited space for public review and research of records.

The main challenge is in continuing to provide Orange County citizens with current mandated services in this time of diminishing countywide resources, loss of AB 589 and SB 90 funding and the loss of 2 positions in COB at the beginning of FY 09-10.

Resources

COB funding also includes recovery of Property Tax Administration funds, which appropriates the pro-rata share of the appeals cost to the agencies receiving property tax funds. The County however does not recover the State's portion of about 60%. We will continue, along with the Assessor, Treasurer-Tax Collector, and Auditor-Controller to pursue State funding in the coming years.

Our goals and objectives provide the focus and direction of our office. Specific goals for this fiscal year, upcoming fiscal year (2010-11) and those for the future are listed below. Those that are long term goals to be completed over the next five fiscal years are so noted.

Action Plan

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.

GOAL – Facilitate the decision and policy making of Orange County government.

Strategy – Automation

1. Continue to develop in support of adopted Board sponsored legislation, our system for submission and tracking of County Conflict of Interest (COI) form 700s (Phase I COI e-file); COI code amendments, and tracking of mandatory Ethic Training requirements. Work with affected entities to convert to standard filing format.
2. Boards, Commissions and Committees (BCC) upgrade and availability on the internet to encourage participation and membership on various BCCs. Online capability will assist in ensuring quality appointments and that vacancies remain at a minimum (*postponed due to budget constraints*).

Strategy – Legislative

1. Continue review of new legislation and statutes to ensure clarity when referring to “clerk” – Clerk of the Board, County Clerk, Clerk of the Court or Registrar.
2. Continue to participate in monitoring legislation that impacts the operations of the COB or mandate activities that are not paid for by the State and assist in successful adoption of County sponsored legislation.

Strategy – Administration

1. Continue to support and participate in professional organizations to maximize coordination, networking and “best practices/cost saving ideas,” and mentoring/succession planning opportunities.

2. Pursue, recently reinstated, SB90 funding for agenda preparation and posting.
3. Investigate possibility of providing Passport services for Hall of Administration and its clients.
4. Provide Clerk support services for Departments/Agencies requesting COB services.

Performance Measure	08-09 Results	09-10 Plan	09-10 Anticipated Results	10-11 Plan	How are we doing??
<p>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 agencies/departments.</p>	COB 99.4%	99.25%	99.25%	99.5%	COB rate continues to remain high.

GOAL – Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.

Strategy – Automation

1. Continue enhancements to existing Assessment Appeals (AA) systems to ensure consistency with statutes, streamlined processes and management tools and reports.
2. Completion of Property Tax Management System (PTMS) redesign Phase II. Continue to participate in the ATS conversion/development project to ensure that existing automation is converted from current software language to other more current and flexible development language and ensure history markers and reports are incorporated into new design for accurate reporting of all AA statistics.
3. Continue to participate in implementing a long-term vision utilizing benefits of E-Commerce (long term goal) with other Property Tax Administration departments.

4. Phase III of Data Entry System for Assessment Appeals. Continue to promote e-File as the County's filing choice for assessment appeals filers (long term goal).
5. Continue to post calendars, new legislation and updates and other relative information to Assessment Appeals Board and Hearing Officers (AAB) website and promote and encourage its use as a useful and valuable tool among the members.
6. Explore electronic communications between AAB and hearing clerk during hearing
7. Enhance ability to scan docs as we receive/input them.

Strategy – Training/Outreach

1. Continue to participate in Public Interface meetings with Property Tax Administration departments and inter-departmental training.
2. Continue to provide training sessions to AAB Members and Orange County Property Tax Agents/Attorneys to ensure awareness of new laws, rules and procedures affecting the assessment appeals process and ensure awareness of pending litigation (AAB Members).
3. Implement the Property Tax Administration vision to increase availability of services and information online in a user friendly consolidated area (long term goal).
4. Continue public education through targeted workshops on assessment appeals process and hearing preparation
5. Continue to convert existing data to online e-file profiles of agents with large filings, when requested, to promote future use.

Strategy – Legislative

1. Continue to monitor and implement State Board of Equalization legislative changes and administrative rule changes.
2. Continue to serve on statewide legislative committees to actively develop, review and participate in legislation affecting the COB operations and to ensure Orange County interests are protected.

*** Assessment Appeals Statistics measured in filing year (July 2nd – July 1st).**

Performance Measure	08-09 Results	09-10 Plan	09-10 Anticipated Results	10-11 Plan	How are we doing??
<p>PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS*</p> <p>What: Indicator of taxpayers’ and agents’ understanding of applications and process.</p> <p>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 online e-file application.</p>	<p>79.8% for 2008 filing year</p> <p>85.3% for 2009 filing year (still in progress)</p>	82%	82%	85%	<p>2008 filing period had many first time filers. The State mandated form can be confusing to taxpayers. Marketed use of our online AAB e-file and continued outreach will improve these statistics.</p>
<p>PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN TWO-YEAR DEADLINE*</p> <p>What: indicator of success managing caseload to ensure required actions are taken before legal deadline.</p> <p>Why: this measurement assesses whether the cob’s current policies and procedures and staffing levels result in processing all appeals within the statutory deadline.</p>	<p>96.9% for 2008 filing year (2-year deadline still in progress)</p>	95%	95%	98%	<p>Meeting anticipated goal due to quality tracking of database information and appeals even though filings increased 400%.</p>

Performance Measure	08-09 Results	09-10 Plan	09-10 Anticipated Results	10-11 Plan	How are we doing??
<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: this measures the cob's success in meeting its customer service goal and guidance of 2nd year protective filing.</p>	<p>98.7% for 2008 filing year</p> <p>99.99% for 2009 filing year</p>	95%	95%	95%	With increased filings, COB will have some difficulties in providing this level of service
<p>(ASSESSMENT APPEALS PUBLIC WORKSHOP OUTREACH) PERCENT OF ATTENDEES WHO AGREED WORKSHOP WAS OVERALL SATISFACTORY - RESULTS OF CUSTOMER SATISFACTION SURVEYS;</p> <p>What: measurement of success in meeting clients' needs.</p> <p>Why: the results assess the cob's success in meeting the needs of its customers in a professional and courteous manner.</p>	97.1% for AA Public Workshop Outreach	95% AA Public Workshop Outreach	95% AA Public Workshop Outreach	95%	Overall COB has received favorable ratings from over 95% of respondents over past 2 years.

GOAL: Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients.

Strategy – Information

1. Preserve documents. Conversion of paper to electronic media for ease of access and file integrity. Conversion of historical paper records to imaged documents with retrieval capabilities (multi-year goal). Reconstruct those documents which are not legible.
2. Convert microfilm, old document information (including Clerk of the Board Information Systems (COBIS) books) to electronic media for ease of access and file integrity.

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3. Cold Storage conversion from ATS into OnBase.
4. Finish automating/scanning 1998 agenda items.

Strategy – Administration

1. Continue to study and develop alternative solutions to quickly implement COB operations in the case of disaster to avoid customer service disruption.
2. Continue to work on basement project: sort and purge documents; send records to offsite storage; maintain records of documents destroyed; and attempt to get all records into file cabinets or organized on shelves, rather than stacked on pallets.

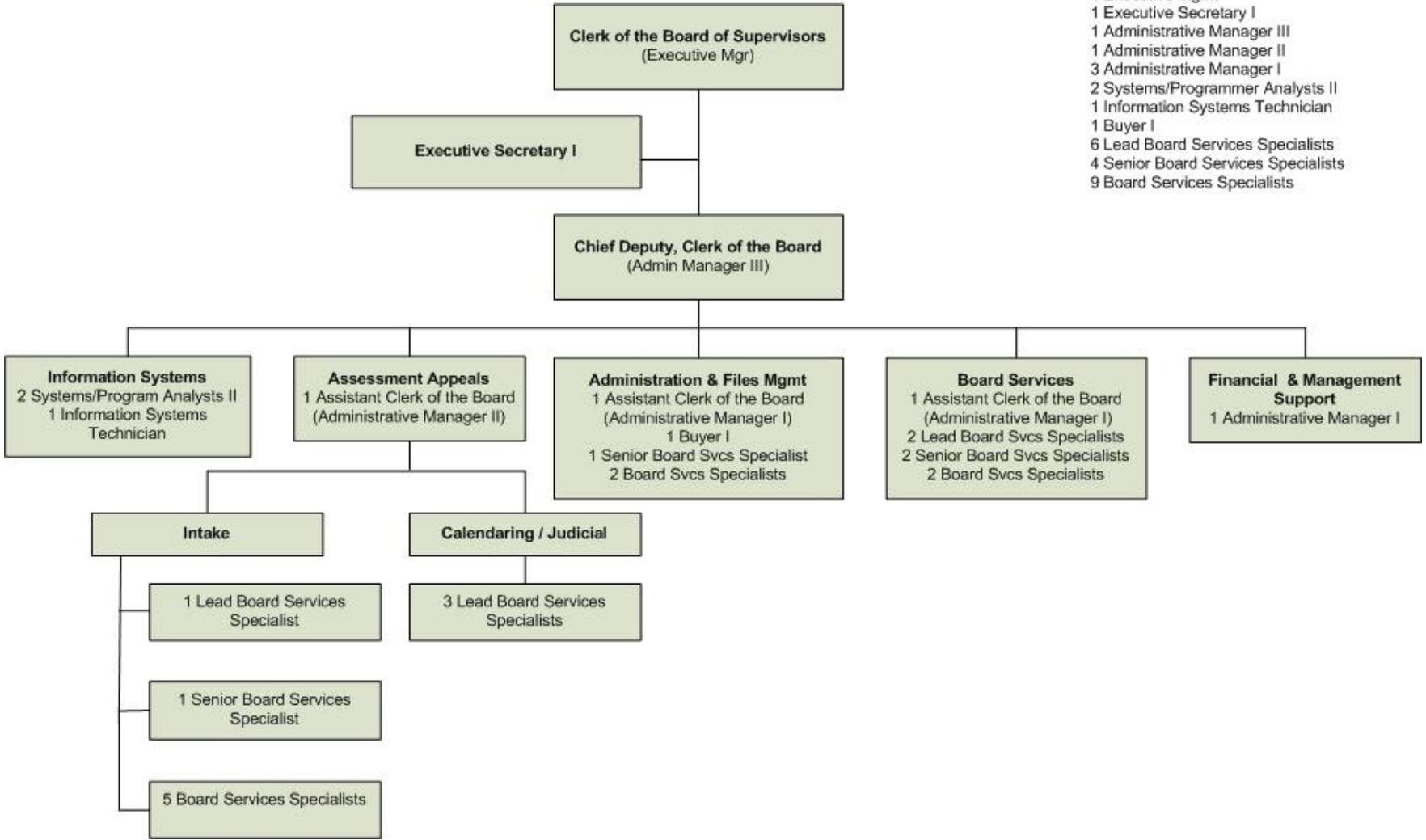
Performance Measure	08-09 Results	09-10 Plan	09-10 Anticipated Results	10-11 Plan	How are we doing??
<p>RESULTS OF CUSTOMER SATISFACTION SURVEYS (COB DEPARTMENT) What: measurement of success in meeting clients’ needs. Why: the results assess the cob’s success in meeting the needs of its customers in a professional and courteous manner.</p>	<p>100% for 2008 All COB Dept. customer survey</p> <p>96% for 2009 All COB Dept. customer survey</p>	<p>100% for COB Dept. customer survey</p>	<p>100% for COB Dept. customer survey</p>	<p>100%</p>	<p>Overall COB has received favorable ratings from respondents over past 2 years.</p>

IV. APPENDICES

- A. Organization Chart
- B. Significant Fiscal Years' 2007 – 2009 Accomplishments

Clerk of the Board Organization Chart FY 09-10

- 30 Total Positions**
- 1 Executive Mgmt
 - 1 Executive Secretary I
 - 1 Administrative Manager III
 - 1 Administrative Manager II
 - 3 Administrative Manager I
 - 2 Systems/Programmer Analysts II
 - 1 Information Systems Technician
 - 1 Buyer I
 - 6 Lead Board Services Specialists
 - 4 Senior Board Services Specialists
 - 9 Board Services Specialists



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B. SIGNIFICANT FYs' 2007 – 2009 ACCOMPLISHMENTS

Facilitate the decision and policy making of Orange County government

Strategy – Automation

1. Developing support of recently adopted Board sponsored legislation system for submission and tracking of County COI form 700s (Phase I COI e-file); COI code amendments and tracking of mandatory Ethics Training requirements.
SB 497 – 2 year bill; Pilot program within the Hall of Administration implemented on 3/5/08. Currently working with vendor on COI code amendments and contact person implementation of system.
Working with 163 agencies that file with the COB to convert to standard code amendment process to enable easy review and adoption of future code amendments.
2. Develop Agenda Staff Report (ASR) for Board Offices so they can utilize automation for filing of the agenda items.
First BOS item on 1/29/08 Agenda.
3. Convert all Access internal tracking system to Structured Query Language (SQL). Work with County Counsel and Risk Management to develop methods of paperless distribution of claims and lawsuits against the County.
System implemented on 10/1/08. Currently sharing database with County Counsel and Risk Management.

Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process

Strategy – Automation

1. Property Tax Management System (PTMS) redesign Phase II – Continue to participate in the ATS conversion/development project to ensure that existing automation is converted from current software language to other more current and flexible development language.
Ongoing. Claim for Refund process to the PTMS automation project will go live in May 2010.

Strategy – Administration

1. Amplification of digital recording of AAB hearing audio to ensure clear audio record and clarity of hearing participants for all 3 hearing rooms. Amplify microphones in the board room so applicant/agent can hear the board members or taxpayers in the audience; replacement of 10-year old audio tape recorder to new digital recording devices to provide mandatory audio record.

Completed August 2009.

Strategy – Public Outreach

1. Continue public education through targeted workshops on assessment appeals process and hearing preparation.

Ongoing. Increased number of workshops to one or more per month. Added profession partners workshops (mortgage, title companies, etc.). Working with Department of Real Estate (DRE) to gain accreditation for Real Estate Agent and Broker continuing education programs.

Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients

Strategy – Administration

1. Continue to study and develop alternative solutions to quickly implement COB operations in the case of disaster to avoid customer service disruption.

Ongoing. COB participating in Business Continuity planning.