Clerk of the Board of Supervisors Business Plan 2013 – Performance Measures Update



Clerk of the Board of Supervisors



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Susan Novak
Clerk of the Board

April 2013

Dear Readers:

We are pleased to present the Orange County Clerk of the Board's Business Plan 2013 – Performance Measures Update.

The Clerk of the Board measures success in public outreach, accuracy, meeting statutory requirements, 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 proud of our efforts and success at meeting statutory requirements, making our records open and accessible to the public and providing these services in an efficient and cost effective manner.

As always, we look forward to serving Orange County.

Sincerely,

Susan Novak 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 11-12 Results	FY 12-13 Plan	FY 12-13 Anticipated Results	FY 13-14 Plan	How are we doing?
99%	96%	98%	97%	COB continues to maintain our low error rate while utilizing 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 11-12 Results	FY 12-13 Plan	FY 12-13 Anticipated Results	FY 13-14 Plan	How are we doing?
90% for 2011 filing year 84.8% for 2012 filing year (still in progress)	85%	85%	85%	With the increasing use of e-filing, accurate & timely filings have leveled out.

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 11-12 Results	FY 12-13 Plan	FY 12-13 Anticipated Results	FY 13-14 Plan	How are we doing?
97.3% for 2010 filing year (still in progress) 96% for 2011 filing year (year 2 in progress)	100%	100%	100%	Meeting anticipated goal due to quality tracking of database information and appeals even with increased level of filings.

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 11-12 Results	FY 12-13 Plan	FY 12-13 Anticipated Results	FY 13-14 Plan	How are we doing?
45% for 2012 filing year (as of 3/4/13; still in progress; filing period finished 9/15/12)	65%	65%	65%	With increased filings, COB is not able to handle all appeals within one year.
63% for 2011 filing year				

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 11-12 Results	FY 12-13 Plan	FY 12-13 Anticipated Results	FY 13-14 Plan	How are we doing?
96%	95%	95%	95%	Overall COB has received favorable ratings from 96% of respondents over past several years.

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 11-12 Results	FY 12-13 Plan	FY 12-13 Anticipated Results	FY 13-14 Plan	How are we doing?
87% (out of 15 respondents, 2 were "somewhat satisfied" but offered no suggestions for improvement).	100%	100%	100%	Overall COB continues to receive favorable ratings from respondents. We continue to explore ways of improving service to our clients.

2012 Business Plan Update Summary of Key Goals Measures

				1	I					
Department:	Clerk of the Boar	d		Service Area:	Assessment Appeals					
				Mission						
Alignment to Great Goal:	Maintain Fiscal In	ntogrity.		Critical Service:	1. Assessment Appeals 2 year deadline					
Angriment to Great Goal.	Iviairitairi i iscai ii	negnty		OCI VICE.	1. Assessment Appeals 2 year deadline					
Performance Measure:	Percent of assess	Percent of assessment appeal claims decided or waived within 2 year deadline								
What:	Indicator of succe	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.									
Frequency of	FY 11-12	FY 12-13	FY 12-13	Excel	Target	Concern	<u> </u>			
Measurement/Baseline	Results	Target	Results	(Green)	(Yellow)	(Red)	How Are we Doing			
monthly	96% for 2011 (in progress) 97.3% for 2010 (in progress)	100%	no stats available yet for 2012 filing year		100%	less than 100%	Meeting anticipated goal due to quality tracking of database information and appeals even with increased level of filings.			
Department:	Clerk of the Boar	d		Service Area:	Board Services					
Countywide Strategic	Maintain Fiscal In			Mission Critical Service:	2. Board Agend	as				
initiativo.	Iviairitairi i iscai ii	педпту		oci vice:	Z. Board Agend	as				
Performance Measure:	Percent of Accura	ate Agenda Title	S							
What:	Measurement of			d accuracy in pre	naring the agenc	ta in compliance	with Brown Act requirements, and identifies areas and issues that require			
Why:	training for staff in				paining the agenc		with Brown 7 for requirements, and identifies areas and issues that require			
Frequency of Measurement/Baseline	FY 11-12 Results	FY 12-13 Target	FY 12-13 Results	Excel (Green)	Target (Yellow)	Concern (Red)	How Are we Doing			
weekly	99%	96%	98%	100%	96%	95%	COB continues to maintain our low error rate while utilizing more			
	3070	0070	3373	10070	3070	3070	aggressive tracking and reporting of errors, additional work load and loss of two positions.			

2012 Business Plan Update Summary of Key Goals Measures

Department:	Clerk of the Board	d		Service Area:	Assessment Ap	peals				
Countywide Strategic Initiative:	Maintain Fiscal In	itegrity		Mission Critical Service:	3. Assessment Appeals filings within first year					
Performance Measure:	Percent of Assessment Appeals Hearings Held or Scheduled within One year of Filing.									
What:	Indicator of efficie	Indicator of efficiency in processing and scheduling appeals.								
Why:	This measures the COB's success in meeting its customer services goal and guidance of 2nd year protective filing.									
Frequency of Measurement/Baseline	FY 11-12 Results	FY 12-13 Target	FY 12-13 Results	Excel (Green)	Target (Yellow)	Concern (Red)	How Are we Doing			
monthly	45% for 2012 filing years (still in progress) 63% for 2011 filing year	65%	65%	100%	65%	45%	With increased filings, COB is not able to handle all appeals within one year.			
Department:	Clerk of the Board Service Area: Assessment Appeals									
	Clerk of the board	u ————————————————————————————————————		Service Area:	Assessment Ap	peals				
	Maintain Fiscal In			Service Area: Mission Critical Service:			essment Appeals			
Initiative:		itegrity	and Timely Filed	Mission Critical Service:	4. Accurate and	timely filed Asso	essment Appeals			
Initiative: Performance Measure:	Maintain Fiscal In	itegrity ately Completed		Mission Critical Service:	4. Accurate and peals Application	timely filed Asso	essment Appeals			
Initiative: Performance Measure: What:	Maintain Fiscal In Percent of Accura	ately Completed	' understanding	Mission Critical Service: Assessment Ap of applications ar	4. Accurate and peals Application and process.	timely filed Asso	essment Appeals tax agents and the use of our website and online e-file application.			
Countywide Strategic Initiative: Performance Measure: What: Why: Frequency of Measurement/Baseline	Maintain Fiscal In Percent of Accura	ately Completed	' understanding	Mission Critical Service: Assessment Ap of applications ar	4. Accurate and peals Application and process.	timely filed Asso				

2012 Business Plan Update Summary of Key Goals Measures

Department:	Clerk of the Board Service Area: Assessment Appeals						
Countywide Strategic Initiative:	Attract and Reta Workforce	in the Best and B	rightest	Mission Critical Service:	5. Customer satisfaction - Assessment Appeals workshops		
Performance Measure:	(Assessment Ap	peals Public Wor	kshop Outreach	n) Percent of Atte	ndees Who Agree	ed Workshop w	as Overall Satisfactory - Results of Customer Satisfaction Survey.
What:	Measurement of	Success in meet	ing Clients' nee	ds.			
Why:	The results asse prepared so that				customers in a pr	ofessional and	courteous manner and ensuring that property owners come to their hearin
Frequency of Measurement/Baseline	FY 11-12 Results	FY 12-13 Target	FY 12-13 Results	Excel (Green)	Target (Yellow)	Concern (Red)	How Are we Doing
monthly	96%	95%	95%	100%	95%	85%	Overall COB has received favorable ratings from 96% of respondents over past several years.

Department:	Clerk of the Board Service Area: All Clerk of the Board								
Countywide Strategic Initiative:	Attract and Retai	in the Best and B	rightest	Mission Critical Service:	6. Customer satisfaction - All Department survey				
	<u> </u>								
Performance Measure:	Results of Custo	mer Satisfaction	Surveys (COB [Department).					
What:	Measurement of	success in meeti	ng clients' need	S.					
Why:	The results asse	ss the COB's suc	cess in meeting	the needs of its	customers in a pr	ofessional and o	courteous manner.		
Frequency of Measurement/Baseline	FY 11-12 Results	FY 12-13 Target	FY 12-13 Results	Excel (Green)	Target (Yellow)	Concern (Red)	How Are we Doing		
yearly	87%	100%	100%	100%	100%	80%	Overall COB continues to receive favorable ratings from respondents. We continue to explore ways of improving service to our clients.		

Insert Department Name 2012 Balanced Scorecard Summary

		Perforr	Performance Results for 2012		
	Trend	Excel Level	Target Level	Concern Lev	
Service Area: Assessment Appeals					
Percent of assessment appeal claims decided or waived within 2 year deadline.	Icomparis	son to your prior	resulti		
deddinio.	Compan	Soft to your prior	A		
Service Area: Board Services					
Percent of accurate agenda titles.	1				
reicent of accurate agenda titles.					
Service Area: Assessment Appeals					
Percent of Assessment Appeals hearings held or scheduled within one	1				
year of filing.					
Comics Area Area Area and Area ala					
Service Area: Assessment Appeals Percent of accurately completed and timely filed Assessment Appeals					
applications.					
_					
Service Area: Assessment Appeals (Assessment Appeals Public workshop Outreach) Percent of attendeeds			<u> </u>		
who agreed workshop was overall satisfactory - results of customer staisfation survey.					

Insert Department Name 2012 Balanced Scorecard Summary

		Performance Results for 2012				
	Trend	Trend Excel Level Target Level Con				
Service Area: All Celrk of the Board						
Results of Customer Satisfatction Surveys (COB Department).	•			•		
Service Area:						