



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 Results	FY 12-13 Plan	How are we doing?
91.4% for 2010 filing year 84% for 2011 filing year (still in progress)	85%	85%	85%	See note below

Although COB has continued its outreach, the number of timely/valid appeals has slightly declined from 2010/2011. This is due to a couple of reasons:

- An increase in first time home buyers and taxpayers who purchased property after the Jan. 1 lien date and filed assessment appeals after receiving the assessor's annual assessment notice which didn't reflect the lower purchase price. This was because the assessor did not produce a supplemental roll in 2011. Therefore it appeared to property owners that the assessment was incorrect. These appeals are deemed invalid because the applicant did not own the property on the Jan. 1 lien date of the year the appeal was filed.
- The further down turn of the economy had taxpayers filing assessment appeals more throughout the year in an attempt to lessen their tax burden. Although, these taxpayers are told they are filing outside the legal filing period, they insist on filing the appeal application.

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?
100% for 2009 filing year 92% 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.

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?
41% for 2011 filing year (as of 3/5/12; still in progress; filing period finished 9/15/11) 60.7% for 2010 filing year	75%	65%	65%	With 4 straight years of increased filings, COB will not be able to handle all appeals within one 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 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).

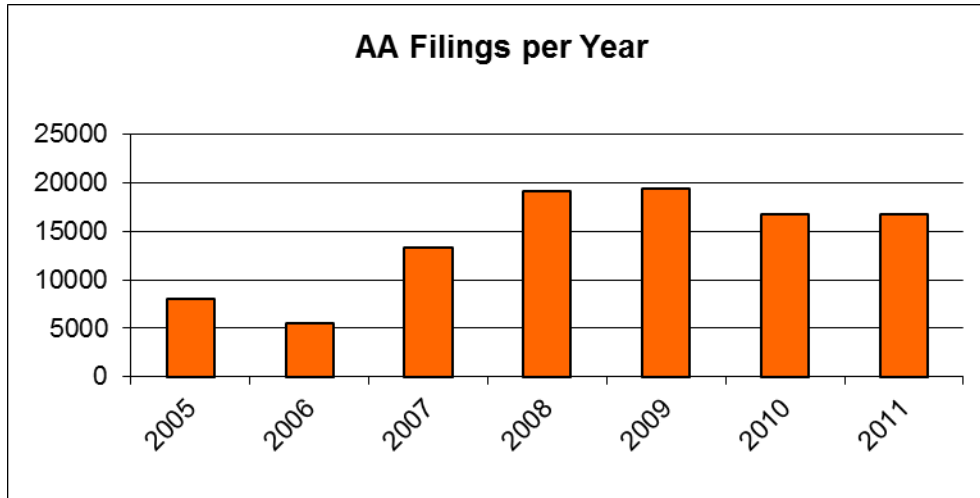
WHAT: Measurement of success in meeting clients' needs.

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.

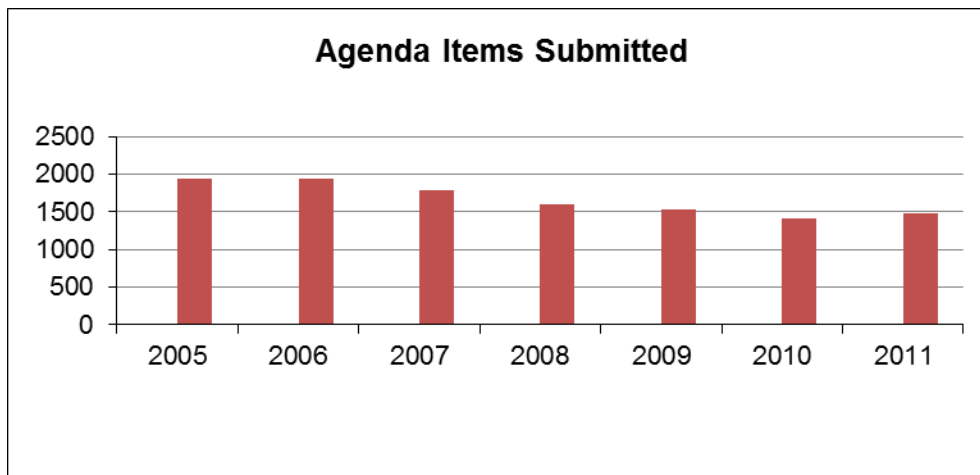
Assessment Appeals Filings per Year

Clerk of the Board receives all assessment appeals filed by Orange County property owners. The number of appeals filed began increasing dramatically in 2007 with 16,000 – 19,000 filings each year since then. This amounts to an increase in workload of 250%.



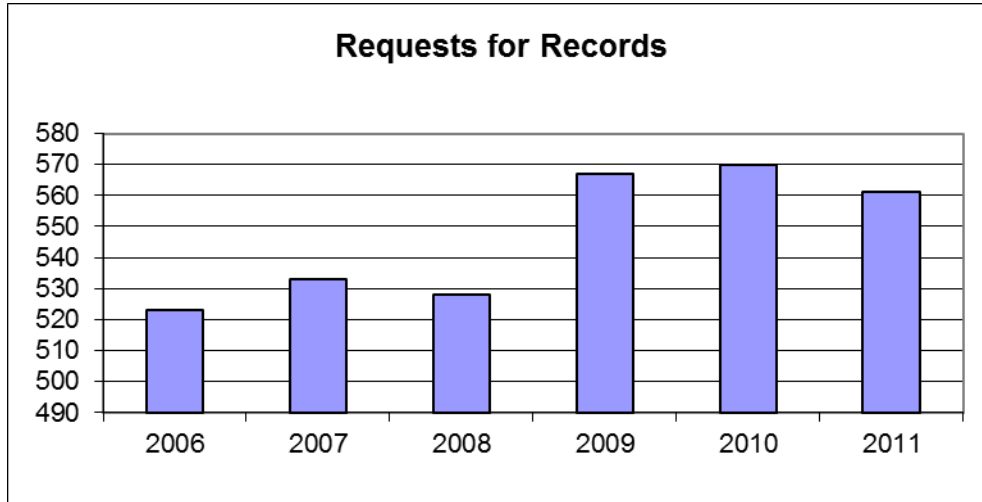
Agenda Items Submitted

This includes creating a title for each item that meets Brown Act requirements; ensuring all required documents, approvals and needed recommended actions are submitted; providing all documents for public review in our office and online; and after Board action, preparing minute orders and processing any agreements, resolutions or ordinance changes.



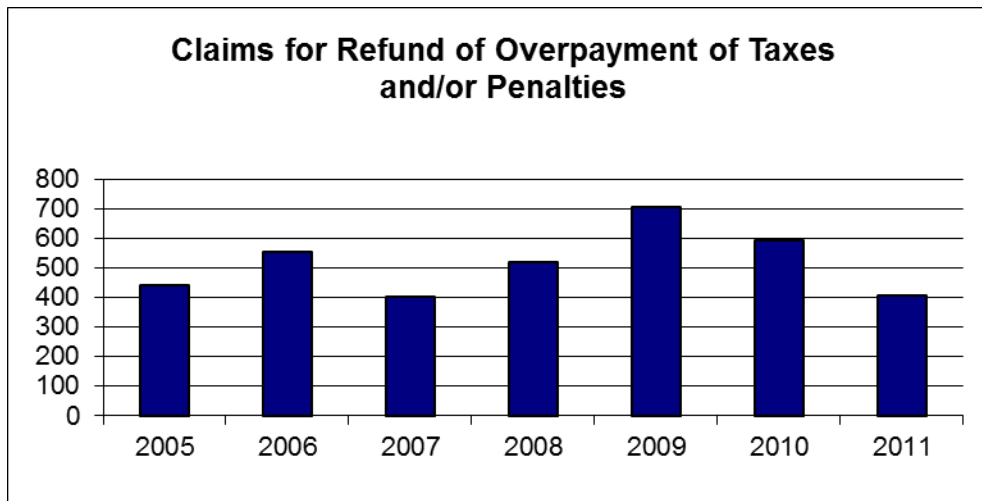
Requests for Records

COB receives requests for County BOS and Assessment Appeals 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.



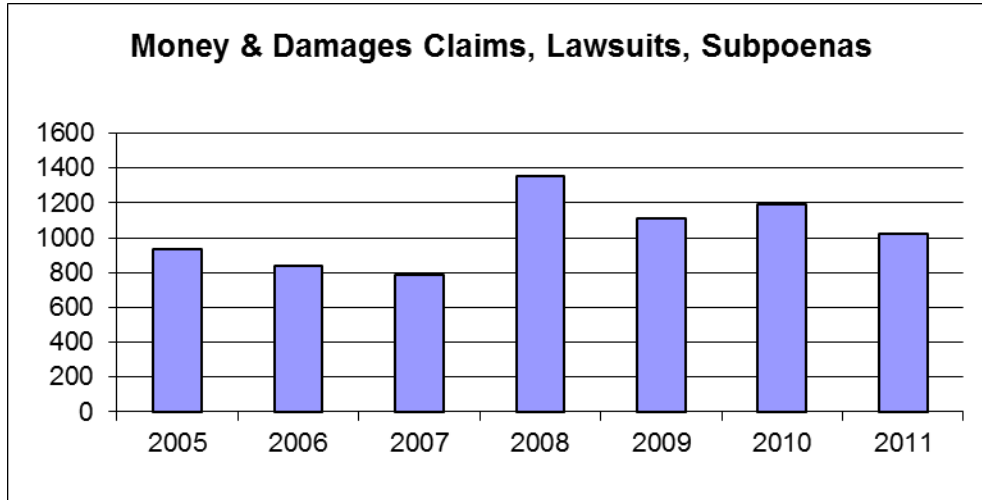
Claims for Refund of Overpayment of Taxes and/or Penalties Paid

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 believe they have overpaid their property taxes (for example a double payment), they are able to file a claim for refund. Over the last few years we have received 400 to 700 claims each year.



Money & Damages Claims, Lawsuits and Subpoenas

COB is the central location for claims against the County to be served. Over the last 4 years we have received over 1000 claims, lawsuits and subpoenas each year.



Did you know...?

- COB maintains the Conflict of Interest (COI) filings of approximately 3500 individuals and receives approximately 5000 filings annually (annual, assuming and leaving office filings).
- 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.