

# The Office of the Clerk of the Board Strategic Business Plan

## Vision

**Pinal County Government provides progressive and proactive leadership in the areas of economic development, state-of-the-art technologies, growth management, and public services to promote healthy and safe communities.**

### COUNTY MISSION

**Pinal County Government protects and enhances its citizens' quality of life by providing public services in an ethical, efficient, and responsible manner delivered by a motivated, skilled, and courteous workforce.**

### DEPARTMENT MISSION

The Mission of the Office of the Clerk of the Board is to provide official record keeping, statutory compliance and other policy-related services to the Board of Supervisors, Elected Officials, County Departments, Boards & Commissions, and the general public, so they can benefit from a transparent government and make informed decisions

### ISSUE STATEMENTS

#### **Issue 1: Public Access**

The continued lack of electronic access to Board approved documents and Board agendas and minutes will, if not addressed, result in:

- Customer frustration
- Extended turn-around time frames
- Inefficient use of staff resources

#### **Issue 2: Records Management**

The continuing lack of a data based tracking and organization system for Board approved items will, if not addressed, result in:

- An increase in potential legal liability
- Extended turn-around time frames
- Inefficient use of staff resources

### **Issue 3: Institutional Knowledge and Training**

The increasing ratio of staff eligible for retirement, coupled with the need for statute specific training will, if not addressed, result in:

- Loss of department specific institutional knowledge
- An increase in potential violation of open meeting laws and other statutory requirements
- Inability to effectively plan for the upcoming five member Board

## STRATEGIC GOALS

### **Strategic Goal 1: Public Access** (Issues 1, 4)

Pinal County Residents will experience improved access to Board approved items and Board agendas and minutes, as evidenced by:

- By 2011 90% of BOS agenda items with supporting documents/attachments are received\* from departments 12 days prior to the board meeting
- By 2010, 80% of the Board approved ordinances (dating back to 1990) and resolutions (dating back to 2000) will be electronically accessible to the public.

*\*"received" is defined as completed through the NOVUS workflow and hardcopies with the Clerk of the Board.*

### **Strategic Goal 2: Improved Customer Service** (Issues 1, 2, 3, 4)

Pinal County Residents, Board of Supervisors, Elected Officials and County management will benefit from timely Clerk of the Board services and an efficient use of staff resources, as evidenced by:

- By 2010, 100% of all customer services requests will be responded to within 3 working days of the request.

### **Strategic Goal 3: Training** (Issue 3)

Elected Officials, Appointed Boards and Commissions, and County departments will benefit from current and ongoing Clerk of the Board specific training coordination as evidenced by:

- By 2012, 100% of Appointed Boards & Commissions will receive initial and ongoing statute and ordinance specific training every year.
- By 2010, have a bi-monthly NOVUS training schedule available on-line

### **Strategic Goal 4: Institutional Knowledge** (Issue 3)

Board of Supervisors, Elected Officials, Boards & Commissions, and the general public will benefit from the preservation of Clerk of the Board specific institutional knowledge as evidenced by:

- By 2012, 100% of the Office of the Clerk of the Board procedures will be in written form and available on the website.

## CROSS CUTTING

**Issues:** #1 –Public Access; #3 – Institutional Knowledge and Training

**Goal:** #3 - Training

**Cross Cutting with:** IT, HR

**Need(s):** Implementation of a bi-monthly NOVUS training schedule

**Issues:** #1 – Public Access; #2 – Records Management; #4- Department Operations

**Goal:** n/a

**Cross Cutting with:** Recorder’s Office

**Need(s):** A more efficient method for locating OnBase documents required for Clerk of the Board access

**Issues:** #1 –Public Access; #2 – Records Management

**Goal:** #1 – Public Access, #2 – Improved Customer Service

**Cross Cutting with:** Development Services, PCSO

**Need(s):** Coordinated efforts in the processing of liquor licenses

## DEPARTMENT ORGANIZATION

### **1. Administrative Program**

- 1.1. Human Resources Activity, page 8
- 1.2. Reserved, page 8
- 1.3. Training Activity, page 9
- 1.4. Records Management Activity, page 10
- 1.5. Vehicle Management Activity, page 11
- 1.6. Financial Services Activity, page 12
- 1.7. Department Director Activity, page 13

### **2. Customer Service Management Program**

- 2.1. Meeting Management Activity, page
- 2.2. Information Activity, page
- 2.3. Customer Service Activity, page
- 2.4. Board Of Equalization Activity

## PROGRAMS

### *Administrative Program*

**Purpose Statement** The purpose of the Administrative Program is to provide human resource, finance, budget, purchasing, records management, vehicle management and purchasing services to Pinal County departments so they can cost effectively manage their resources to achieve the planned results.

### **Key Results**

- 98% of all employee appraisals will be submitted to Human Resources by the end of January due date.
- 85% of training dollars spent that directly align to County or Department strategic goals.
- 100% of records managed in compliance with legal and policy requirements as determined by the Arizona State Library of Archives.
- 95% of department vehicles with preventative maintenance performed as scheduled.
- 95% of department vehicles operated more than 10,000 miles per year.
- 90% of non-construction payment authorizations entered into the system within three business days of receipt of goods.
- 100% of applicable Key Results achieved.
- 75% of surveyed customers who say they are satisfied or very satisfied with the services provided by the Public Works Department.

## *Program Two*

**Purpose Statement** The purpose of the Customer Service Management Program is to provide meeting management, training services, and information retrieval and response services to the public and county departments so they can have access to information in order to make efficient and informed decisions in a timely manner.

### **Key Results**

- 75% of BOS agenda items with supporting documents/attachments, are received\* from departments 12 days prior to the board meeting.
- 25% of appointed Boards and Commissions will receive initial and ongoing statute and ordinance specific training
- 50% of all customer service requests will be responded to within 3 working days of the request
- 100% of property valuation milestones completed within statutory time frames

# ACTIVITIES

## 1. Administrative Program

**Purpose Statement** The purpose of the Administrative Program is to provide human resource, finance, budget, purchasing, records management, vehicle management and purchasing services to Pinal County departments so they can cost effectively manage their resources to achieve the planned results.

### Section 1.1: Human Resources Activity

**Activity Purpose Statement** The purpose of the Human Resource Activity is to provide employee selection, evaluation and support services to department management so they can manage, evaluate, and retain a qualified and diverse workforce.

<b>Activity Services</b>	<ul style="list-style-type: none"> <li>• Candidate Selection Recommendations</li> <li>• Job Postings</li> <li>• Policy Interpretations</li> <li>• Employee Relations Management</li> <li>• Employee Interviews</li> <li>• Grievance hearings</li> <li>• Employee Inquiry Responses</li> </ul>	<ul style="list-style-type: none"> <li>• Performance Appraisals/ Evaluations</li> <li>• Employee Assistance Referrals</li> <li>• Employee Orientation Sessions</li> <li>• Exit Interviews</li> <li>• Personnel Reports</li> <li>• Police and Procedure Updates</li> <li>• Employee Awards</li> <li>• “Silent Whistle” Investigations</li> </ul>
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**Family of Measures**

Results

1. 98% of all employee appraisals will be submitted to Human Resources by the end of January due date  
(# of employee appraisals submitted by due date/total # of appraisals)

Outputs

1. 1 employee appraisals submitted on/by due date

Demands

1. 1 employee appraisals anticipated to be submitted

Efficiencies

N/A

**Activity Manager(s)** • Sheri Cluff

**Activity Budget** \$x,xxx,xxx

### Section 1.2: Reserved

## 1. Administrative Program

**Purpose Statement** The purpose of the Administrative Program is to provide human resource, finance, budget, purchasing, records management, vehicle management and purchasing services to Pinal County departments so they can cost effectively manage their resources to achieve the planned results.

### Section 1.3: Training Activity

**Activity Purpose Statement** The purpose of the Training Activity is to provide department specific training services to employees so they can more effectively meet the County and/or department strategic goal.

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<b>Activity Services</b>	<ul style="list-style-type: none"><li>• Training Sessions</li><li>• Safety Training Sessions</li><li>• Employee Handbooks</li></ul>	<ul style="list-style-type: none"><li>• Training Assessments</li><li>• Training Records</li><li>• Training Schedules/Arrangements</li></ul>
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**Family of Measures**

Results

1. 85% of training dollars spent that directly align to County or Department strategic goals.  
(# of training dollars spent that directly align to County or Department strategic goals / total number of training dollars spent)

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Outputs

1. 940 training \$ spent that directly align to County or Department strategic goals

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Demands

1. 1000 training \$ spent that directly align to County or Department strategic goals anticipated to be spent

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Efficiencies

1. \$ Training Activity \$ spent that directly align to County or Department strategic goals

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**Activity Manager(s)**

- Sheri Cluff

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**Activity Budget** \$x,xxx,xxx

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## ***1. Administrative Program***

**Purpose Statement** The purpose of the Administrative Program is to provide human resource, finance, budget, purchasing, records management, vehicle management and purchasing services to Pinal County departments so they can cost effectively manage their resources to achieve the planned results.

### ***Section 1.4: Records Management Activity***

**Activity Purpose Statement** The purpose of the Records Management Activity is to provide record retention, disposal and retrieval services to departments so they can access, provide, retain and dispose of records in a timely manner and as legally required.

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**Activity Services**

- Record Archives
- Record Disposals
- Record Disposition Authorizations
- Records Destruction List
- Records Inventory
- Records Requests Responses

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**Family of Measures**

Results

1. 100% of record series managed in compliance with legal and policy requirements as determined by the Arizona State Library of Archives.  
(# of record series managed in compliance with legal and policy requirements / total # of records series managed)

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Outputs

1. 1 record series in compliance with legal and policy requirements  
(data is currently not available for this measure; a number will be entered after all record series are established )

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Demands

1. 11 record series anticipated to be in compliance with legal and policy requirements.

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Efficiencies

1. \$ Records Management Activity expenditure per record series in compliance with legal and policy requirements.

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**Activity Manager(s)**

- **AmberLee Mudd**

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**Activity Budget** \$x,xxx,xxx

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## ***1. Administrative Program***

**Purpose Statement** The purpose of the Administrative Program is to provide human resource, finance, budget, purchasing, records management, vehicle management and purchasing services to Pinal County departments so they can cost effectively manage their resources to achieve the planned results.

### ***Section 1.5: Vehicle Management Activity(This Activity Not Used)***

**Activity Purpose Statement** The purpose of the Vehicle Management Activity is to provide maintenance scheduling, reporting and vehicle requirement definition services to the department so they can have cost effective and safe vehicles.

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**Activity Services**

- Vehicle Maintenance and Repair Service Schedules
- Vehicle Utilization Reports
- Maintenance Records
- Fleet Credit Card Usage Reports
- Vehicle Usage Assessment

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**Family of Measures**

**Results**

1. 95% of department vehicles with preventative maintenance performed as scheduled (# of department vehicles with preventative maintenance performed as scheduled/ total department vehicles)
2. 95% of department vehicles operated more than 10,000 miles per year (# of department vehicles operated more than 10,000 miles per year/ total department vehicles)

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**Outputs**

1. 0 department vehicles operated

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**Demands**

1. 0 department vehicles anticipated to be operated
2. 0 department vehicles operated more than 10000 miles a year

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**Efficiencies**

1. \$ Vehicle Management Activity expenditure per vehicle operated

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**Activity Manager(s)** • n/a

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**Activity Budget** \$x,xxx,xxx

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## 1. Administrative Program

**Purpose Statement** The purpose of the Administrative Program is to provide human resource, finance, budget, purchasing, records management, vehicle management and purchasing services to Pinal County departments so they can cost effectively manage their resources to achieve the planned results.

### Section 1.6: Financial Services Activity

**Activity Purpose Statement** The purpose of the Financial Services Activity is to provide financial, budget information and purchasing services to department managers so they can ensure efficient use of County resources.

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<b>Activity Services</b>	<ul style="list-style-type: none"><li>• Grant Reports</li><li>• Grant Applications</li><li>• Grant Programmatic Progress Reports</li><li>• Payment Authorizations</li><li>• Employee Reimbursement Authorizations</li></ul>	<ul style="list-style-type: none"><li>• Year-end Accounting Records</li><li>• Cash Receipts</li><li>• Budget Proposal</li><li>• Spending Requests</li><li>• Appropriation Adjustments</li><li>• Expenditure Projections</li><li>• Performance Reports</li></ul>
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**Family of Measures**

Results

1. 90% of non-construction payment authorizations (purchase orders) entered into the system within three business days of receipt of goods.  
(# of payment authorizations (purchase orders) entered into the system within three business days of receipt of goods divided by the total # of payment authorizations entered into the system)

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Outputs

1. 90 payment authorizations (purchase orders) received within three business days of physical receipt of item(s)

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Demands

1. 100 payment authorizations anticipated to be entered into the system

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Efficiencies

1. \$ Financial Services Activity per payment authorization entered within three business days

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**Activity Manager(s)**

- AmberLee Mudd

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**Activity Budget** \$x,xxx,xxx

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## 1. Administrative Program

**Purpose Statement**

The purpose of the Administrative Program is to provide human resource, finance, budget, purchasing, records management, vehicle management and purchasing services to Pinal County departments so they can cost effectively manage their resources to achieve the planned results.

**Section 1.7: Department Director Activity**

**Activity Purpose Statement**

The purpose of the Department Director Activity is to provide results oriented leadership and management services to Pinal County residents and businesses so they can benefit from effective and efficient County services.

**Activity Services**

- Reports
- Direction
- Employee Supervision Meeting
- Inquiry Responses
- Strategic Business Plans
- Issue Resolutions
- Special Projects
- Budgets
- Department Structures
- Policies/Procedures
- Employee Evaluations
- Program Evaluations
- Recommendations
- Leadership

**Family of Measures**

Results

1. 100% of Key Results achieved  
(# of key results achieved/total # of key results)
2. 75% of surveyed customers who say they are satisfied or very satisfied with the services provided by the Office of the Clerk of the Board.  
(# of respondents who state they are satisfied or very satisfied with the departments services/total # of respondents)

Outputs

1. 0 of customers responding to the department survey

Demands

1. 125 of customers expected to respond to the survey

Efficiencies

1. \$ Department expenditures per customer served

**Activity Manager(s)**

- Sheri Cluff

**Activity Budget**

\$x,xxx,xxx

**2. Customer Service Management Program**

**Purpose Statement**

The purpose of the Customer Service Management Program is to provide meeting management, training services, and information retrieval and response services to the public and county departments so they can have access to information in order to make efficient and informed decisions in a timely manner.

**Section 2.1: Meeting Management Activity**

**Activity Purpose Statement**

The purpose of the Meeting Management Activity is to provide agenda, public notification, training, and coordination services to the public and county departments so they can conduct their business in an efficient and timely manner.

**Activity Services**

- Board Of Supervisor(BOS) agendas
- Supplemental BOS agendas
- Special District agendas
- Board Of Supervisor agenda postings
- Special District agenda postings
- Board of Supervisor meeting minutes
- Board of Equalizations meeting coordination's
- Public Notices
- NOVUS Agenda training sessions
- Special District meeting minutes
- Executive Session minutes
- Agenda Item Reviews
- Department Agenda Submittal Consultations
- Board of Supervisor meeting calendars
- Board room preparations
- Board of Supervisors Marquee Updates

**Family of Measures**

Results

1. 75% of BOS agenda items with supporting documents/attachments, are received\* from departments 12 days prior to the board meeting. (# of BOS agenda items with supporting documents received from departments 12 days prior to the board meeting/total # of BOS agenda items with supporting documents submitted)
2. 90% of departments that have employees with updated NOVUS training. (# of departments with employees that have received updated NOVUS training/total # of County departments)

*\*\*received\*\* is defined as completed through the NOVUS workflow and hardcopies with the Clerk of the Board.*

Outputs

1. 30 agendas
2. 60,000 supporting documents/attachments
3. 4 departments that have updated NOVUS training

Demands

1. 30 agendas anticipated to be delivered
2. 70,000 supporting documents/attachments anticipated
3. 46 departments that are anticipated to require NOVUS training

Efficiencies

1. Meeting Management Activity \$ expenditures per agenda

**Activity Manager(s)**

- AmberLee Mudd

**Activity Budget**

\$x,xxx,xxx

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## **2. Customer Service Management Program**

**Purpose Statement** The purpose of the Customer Service Management Program is to provide meeting management, training services, and information retrieval and response services to the public and county departments so they can have access to information in order to make efficient and informed decisions in a timely manner.

### **Section 2.2: Information Activity**

**Activity Purpose Statement** The purpose of the Information Activity is to provide posting, routing, and training coordination services to the public, county departments, and boards and commissions so they can have access to information to make informed decisions.

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**Activity Services**

- Justice of the Peace/Constable monthly report filings
- Boards & Commissions Open Meeting Laws training coordinations
- Public Meeting postings
- Lawsuit distributions
- Application & Permit Routings
- Application & Permit postings
- Annexation Information copies
- Financial Disclosure statement notifications

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**Family of Measures**

Results

1. 25% of appointed Boards and Commissions will receive initial and ongoing statute and ordinance specific training  
(# of appointed Boards and Commissions that received initial and ongoing training/total # of appointed Boards and Commissions)
2. 100% of lawsuits routed to appropriate departments within 48 hours of receipt.  
(# of lawsuits routed to appropriate department within 48 hours/total # of lawsuits routed)

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Outputs

1. 0 training sessions coordinated
2. 300 lawsuits routed

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Demands

1. 2 training sessions anticipated to be coordinated
2. 300 lawsuits anticipated to be routed

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Efficiencies

1. Information Activity \$ expenditure per training coordination

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**Activity Manager(s)** • **Sheri Cluff**

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**Activity Budget** \$x,xxx,xxx

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## 2. Customer Service Management Program

### Purpose Statement

The purpose of the Customer Service Management Program is to provide meeting management, training services, and information retrieval and response services to the public and county departments so they can have access to information in order to make efficient and informed decisions in a timely manner.

## Section 2.3 : Customer Service Activity

### Activity Purpose Statement

The purpose of the Customer Service Activity is to provide document retrieval and inquiry response services to the public and county departments so they can have the information they need in a timely manner.

### Activity Services

- Recorded Document routings
- Certified (Copy of the official document) Document copies
- Public document retrievals
- Internal document retrievals
- Board Action inquiry responses
- Public Information Request responses
- Processed documents
- Agenda inquiry responses
- Telephone/Email Inquiry responses

### Family of Measures

#### Results

1. 50% of all customer service requests will be responded to within 3 working days of the request  
(# of customer service requests responded to within 3 working days/total # of customer service requests)
2. 25% of internal procedures in written form  
(# of procedures in written form/total # of procedures)
3. 25% of applicable processes (liquor licenses, agenda items, public involvement in board meetings, etc.) available on-line  
(# of processes available online/total # of processes)
4. 30% of Board approved ordinances (dating back to 1990) and resolutions (dating back to 2000) will be electronically accessible to the public.  
(# of ordinances and resolutions available on line/total # of ordinances and resolutions)

#### Outputs

1. 1100 customer service requests

#### Demands

1. 1100 anticipated customer service requests

#### Efficiencies

1. Customer Service Activity \$ expenditure per customer service request response

### Activity Manager(s)

- Sheri Cluff

**Activity Budget**    \$x,xxx,xxx

***2. Customer Service Management Program***

**Purpose Statement**

The purpose of the Customer Service Management Program is to provide meeting management, training services, and information retrieval and response services to the public and county departments so they can have access to information in order to make efficient and informed decisions in a timely manner.

**Section 2.4 : Board of Equalization Activity**

**Activity Purpose Statement**

The purpose of the Board of Equalization Activity is to provide coordination, processing, hearing and inquiry response services to the petitioners, State Board of Equalization, Board of Supervisors and Assessor’s Office so they can benefit from a statutorily compliant hearing process that determines property valuation.

**Activity Services**

- Hearing coordinations
- Petitions for Review of Property of Valuations
- File Updates
- Parcel Listings
- Notices of Change
- IT Coordinations
- BOE Hearings
- File transports
- State communications
- Mailings
- Phone inquiry responses
- Email inquiry responses

**Family of Measures**

Results

1. 100% of property valuation milestones completed within statutory time frames (# of property valuation milestones completed within statutory time frames/total # of property valuation milestones completed)
2. 100% of notice of change milestones completed within statutory time frames (# of notice of change milestones completed within statutory time frames/total # of notice of change milestones completed)

Outputs

1. 1200 hearings coordinated
2. 300 phone/email (property valuation related) inquiry responses
3. 800 listings completed

Demands

1. 300 phone/email (property valuation related) inquiries

Efficiencies

1. Board of Equalization Activity \$ expenditure per propert valuation hearing
2. Board of Equalization Activity \$ expenditure per notice of change hearing

**Activity Manager(s)**

- **AmberLee Mudd**

**Activity Budget**

\$x,xxx,xxx