



PINAL • COUNTY
wide open opportunity

**OFFICE OF PUBLIC FIDUCIARY
STRATEGIC BUSINESS PLAN
FY 2011/2012**

COUNTY 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 Public Fiduciary is to provide estate management and administration, to protect vulnerable and incapacitated adults in need of a guardianship and/or conservatorship when no other person or corporation is able or willing to serve.

SUMMARY OF MAJOR SERVICES PROVIDED

- Legal Representation of Office
- Client Placement
- Intake Evaluations for Services
- Make Major Decisions for Clients
- Client Bill Payments
- Client Accounting
- Client Transportation
- Client Support
- Make Funeral Arrangements
- Medical Treatment Approvals
- Indigent Burial
- Service Needs Assessment
- Client Service Plans
- 24/7 On-Call Responses
- Client Budget Preparations
- Client Asset Inventories
- Asset Protection and Disbursement
- Client Visitation

MANDATED SERVICES

- Annual Guardianship Reports
- Annual Accountings
- Quarterly Visits to Guardianship Ward
- Semi-Annual Visits to Conservator Ward
- Indigent Burials
- Petition for Fees
- Inventory of Assets
- Asset Distribution

ISSUE STATEMENTS

Issue 1: Increasing Population and Changing Demographics

The growing population of the elderly and changing demographics with Pinal County is leading to an increased demand for services which, if not addressed, will result in:

- Reduction in timely services and increased liability to the County
- More referrals to the Office
- Case loads increasing
- Shift from proactive management to reactive management

Issue 2: Reduction in public funding for benefit programs

The reduction in federal and state funding for benefit programs with more stringent eligibility requirements for the benefits will, if not addressed result in:

- A reduction in the ability of this office to ensure that our incapacitated customers are able to meet their basic needs
- Increases in the complexity of the cases appointed to this office because of lack of services which now require more time to obtain the same level of services that were available in the past
- Decreased safety of clients (vulnerable adults and severely mentally ill) and the community

COUNTY PRIORITY ALIGNED TO:

No direct alignment with County priorities.

2-5 YEAR STRATEGIC GOALS:

By 2016, the Office of Public Fiduciary will have achieved the following goals in order to protect vulnerable adults in our services system as evidenced by the completion of the following:

1. Appropriate services provided to client and documented in case management plan
2. A comprehensive budget for each client including but not limited to, estimated costs for medical and dental treatment, room and board, monthly spending allowance and any other anticipated expenses, as well as the expected income going into the account
3. Investigation of referrals to the Public Fiduciary Office with a decision as to the appropriateness of the client for entry into our service system within 31 days

4. All clients on benefit entitlement programs will maintain their financial eligibility through monthly monitoring

CROSS CUTTING ISSUES

None

ANNUAL PERFORMANCE MEASURES:

Public Fiduciary

1. By June 30th, 2013, 90% of audited files will show the services that have been provided as well as a completed budget listing the client's income and expenses
2. By June 30th, 2013, 95% of all Public Fiduciary referrals will come to a disposition within one month of receipt of referral

Client Financial Services

1. By June 30th, 2013, 100% of benefit program clients will maintain financial eligibility through monthly monitoring

REVENUE BY FUND:

Programs/Activities	Cost Center	Total Budget
General Fund	3530410	\$90,000.00
General Fund Total		\$90,000.00

EXPENDITURES BY FUND:

Programs/Activities	# of Full Time Employees	# of Part Time Employees	Cost Center	Total Budget
General Fund	10	0	3530410	\$808,646.00
General Fund Total				\$808,646.00