PINAL • COUNTY
wide open opportunity

OFFICE OF PUBLIC FIDUCIARY
STRATEGIC BUSINESS PLAN
FY 2012/2013

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 protect vulnerable and incapacitated adults in need of a guardianship and/or conservatorship or to protect and administer an estate 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: Changing Demographics and Statutory Requirements

The changing demographics of more elderly within Pinal County and the stricter legislative requirements enacted in 2012 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
- More paperwork for case managers to complete to comply with statutes
- 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 cases appointed to Public Fiduciary due to a scarcity of resources and competition for those resources

COUNTY PRIORITY ALIGNED TO:

No direct alignment with County priorities.

2-5 YEAR STRATEGIC GOALS:

By 2015, clients under the protection of the Office of Public Fiduciary will receive the highest level of care as evidenced by:

1. 90% of annual reports and accountings will be submitted to the Court by the filing date set by the Court in a Minute Entry.

2. An increase in the ratio of case managers to clients from 1:55 to 1:45.

3. 90% of audited guardianship files will meet standards for accuracy and completeness based on scoring criteria found in the internal policy manual.

4. 100% of entitlement eligibility clients will remain eligible for entitlements quarterly

ANNUAL PERFORMANCE MEASURES:

1. 75% of annual guardianship reports and accounting will be submitted to the Court by filing date set by the Court in a Minute Entry.

2. 75% of audited guardianship files will meet standards for accuracy and completeness based on scoring criteria found in the internal policy manual.

3. 100% of entitlement eligibility clients will remain eligible for entitlements quarterly

Statement:

A decrease in the ratio of case managers to clients from 1:55 to 1:45 will occur by 2015.

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	$876,579.00
General Fund Total				**$876,579.00**