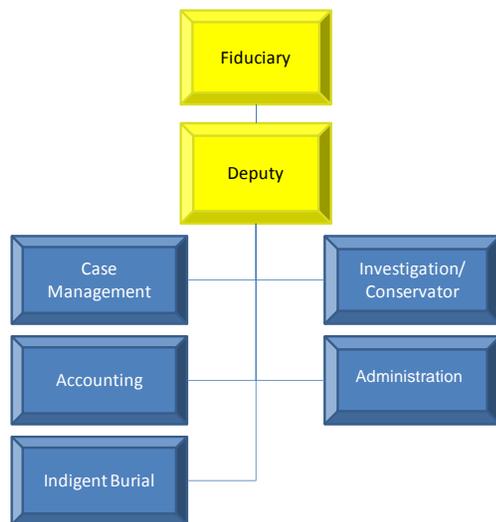


MISSION STATEMENT

To provide guardianships, conservatorships, decedent services and court ordered investigations for vulnerable persons so their estates and well-being are protected in a professional, efficient and compassionate manner.

ORGANIZATION



The Public Fiduciary is appointed by the Board of Supervisors. Administrative oversight is provided by the County Administrator.

MAJOR FUNCTIONS

Case Management: Carries out all needs of the Public Fiduciary clients regarding health, safety and welfare at the direction of the Public Fiduciary.

Investigations: Provides information and recommendations to Case Management and to the Superior Court relative to pending guardianship and conservatorship cases and maintains asset management system.

Accounting: Provides accurate records to serve the needs of the client and of the Superior Court.

Administration: Serves as guardian or conservator when so designated by the Superior Court. Provides administrative support to the department as needed.

Indigent Burial: Investigates need for indigent burials, searches for heirs and assets and collects reimbursement from estate assets and governmental funding when available.

FIDUCIARY



PERFORMANCE REPORTING

Performance Measure Actuals & Benchmark - Public Fiduciary

The following measures are departmental priorities identified in the County-wide Strategic Plan:

Department Goal: Measure:	Target/Benchmark				
	FY2014	FY2015	FY2016	FY2017	FY2018
Comply with Administrative Office of the Courts consent requirement.					
%of staff certified through the Arizona Office of the Courts.	25%	25%	25%	35%	35%
Meet National Guardianship Association standard.					
Client to Case Manager Ratio.	42-1	40-1	40-1	40-1	30-1
Meet County burial obligations per Arizona Revised Statutes.					
# of available plots.	30	100	100	100	1000
Meet inventory and disposition of asset requirements through the Administrative Office of the Courts and the Arizona Revised Statutes.					
# of days.	20	18	16	13	10

STRATEGIC GOALS

Administration

Community Health, Safety and Well-being

Goal: Comply with Administrative Office of the Courts consent requirement.

Objective: Increase the percent of staff certified through the Arizona Administrative Office of the Courts to 35% by FY2018.

Indicator: Percentage of staff certified through the Arizona Office of the Courts.

Current Status: 25%

Strategy: 1) Work with Mohave County to implement a study program 2) Hold monthly trainings with staff to increase their knowledge on Fiduciary code of conduct and state statutes.

Case Management

Community Health, Safety and Well-being

Goal: Meet National Guardianship Association standard.

Objective: Reduce the ratio of client to case manager to 30:1 by FY2018.

Indicator: Client to Case Manager Ratio.

Current Status: 42:1

Strategy: 1) Reorganize office structure in order for other employees to carry small case loads 2) Hire additional Case Manager.

PERFORMANCE REPORTING (CONT)

Indigent Burial

Community Health, Safety and Well-being

Goal: Meet County burial obligations per Arizona Revised Statutes.

Objective: Increase the number of County burial plots to 1,000 by FY2018.

Indicator: Number of available plots.

Current Status: 30

Strategy: 1) Contract with local cemetery until County Cemetery is finished 2) Build County Cemetery.

Investigation/Conservator

Community Health, Safety and Well-being

Goal: Meet inventory and disposition of asset requirements through the Administrative Office of the Courts and Arizona Revised Statutes.

Objective: Decrease the number of days to complete inventories and estate sales to 10 days by FY2018.

Indicator: Number of days.

Current Status: 20

Strategy: 1) Research possibility of utilizing the services of outside resources 2) Utilize other staff members within the department to help with the inventories and estate sales.

SIGNIFICANT ACCOMPLISHMENTS

Since the Public Fiduciary office started managing the Indigent Burial Program budget in fiscal year 09/10, we have been able to save the County over \$65,000.00 in expenses and we have also increased our reimbursement collections by over \$29,000.00. The Public Fiduciary office also came up with the new protocols which has allowed us to maximize the remaining plots in the City of Yuma Cemetery. This new protocol will save the County approximately \$250,000.00.

QUICK FACT:

The Office of the Public Fiduciary was established in 1974 by Arizona State Legislature A.R.S. Section 14-5601(A). Every county in every state has one although other states tend to refer to them as Public Guardians/Public Administrators.





INITIATIVES NEW FOR 2014

This is a continuation budget this fiscal year. There are no major new initiatives, programs or additional resources.

INITIATIVES PRIOR YEAR STATUS

Investigations:

- Increase research of heirs and assets prior to cremation or burial of indigent persons.

Status: Ongoing

Administration:

- Research the requirements for record retention and carry out the procedure for all files.

Status: Ongoing

Indigent Burials:

- Work with Development Services (CIP) regarding land for new County Cemetery

Status: Ongoing

STAFFING LEVELS

Authorized Positions by Major Function

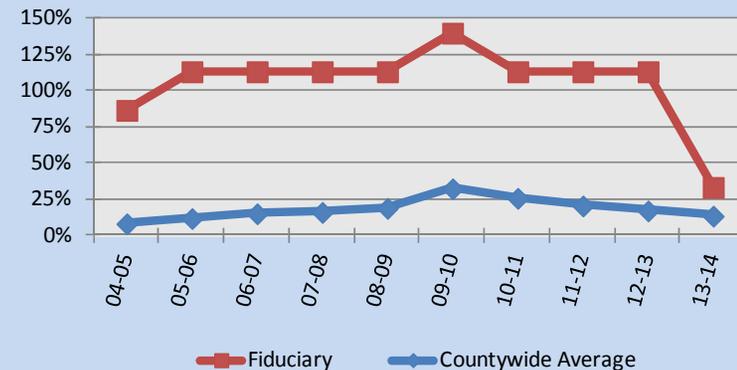
	2010-11	2011-12	2012-13	2013-14
Director and deputy	2.00	2.00	2.00	2.00
Case management	2.00	2.00	2.00	2.00
Indigent Burial	1.00	1.00	1.00	1.00
Investigations	1.00	1.00	1.00	1.00
Accounting	1.00	1.00	1.00	1.00
Administration	1.00	1.00	1.00	1.00
Total	8.00	8.00	8.00	8.00

Authorized Positions by Classification

	2010-11	2011-12	2012-13	2013-14
Public Fiduciary	1.00	1.00	1.00	1.00
Deputy Public Fiduciary	1.00	1.00	1.00	1.00
Indigent Burial Specialist	1.00	1.00	1.00	1.00
Chief Investigator/Conservator	1.00	1.00	1.00	1.00
Case Manager	2.00	2.00	2.00	2.00
Account Clerk II	1.00	1.00	1.00	1.00
Office Specialist I	1.00	1.00	1.00	1.00
Total	8.00	8.00	8.00	8.00

There is no change in staffing levels for fiscal year 2013-14.

Fiduciary's Growth in Positions Compared to FY04
Base Yr. - All Funds



Public Fiduciary's staffing level has increased by 33.3% since fiscal year 2003-04; higher than the Countywide Average of 13.5%. The department housed 6 positions in 2003-04.

FIDUCIARY



FUNDING LEVELS

Approximately nine years ago, the Fiduciary's demand for services and staff grew immensely. Though the Fiduciary can charge a fee for services, the majority of its operational funding is from the General Fund's general sources.

Revenue: Fiduciary fees can be collected for services provided by the Fiduciary. However, the majority of the customers are indigent clients and collections are minimal. General Fund revenue is provided at the level needed for General Fund expenditures.

Personnel: There are no substantial changes this fiscal year.

Supplies and Services: There are no substantial changes this fiscal year.

Capital Outlay: There is no Capital Outlay budgeted for this fiscal year.

Fiduciary	Actual 2010-11	Actual 2011-12	Budget 2012-13	Estimate 2012-13	Budget 2013-14	% Change
Sources						
General Revenue	\$ 518,711	\$ 546,087	\$ 585,741	\$ 585,658	\$ 591,925	1.06%
Special Revenue	-	-	-	-	-	N/A
Balance Forward	-	-	-	-	-	N/A
Total Sources	\$ 518,711	\$ 546,087	\$ 585,741	\$ 585,658	\$ 591,925	1.06%
Uses						
Personnel	432,270	441,694	447,614	447,614	455,766	1.82%
Supplies & Services	86,441	104,393	138,127	138,044	136,159	-1.42%
Capital Outlay	-	-	-	-	-	N/A
Debt Service	-	-	-	-	-	N/A
Reserves & Contingencies	-	-	-	-	-	N/A
Total Uses	\$ 518,711	\$ 546,087	\$ 585,741	\$ 585,658	\$ 591,925	1.06%
Other Sources & Uses						
Transfers In	-	-	-	-	-	N/A
Transfers Out	-	-	-	-	-	N/A
Total Other Sources & Uses	\$ -	\$ -	\$ -	\$ -	\$ -	N/A
Other Restricted	\$ -	\$ -	\$ -	\$ -	\$ -	N/A