



## Candy Wheeler-Ruby, Public Fiduciary

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.

### 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.

### 2013-2018 OBJECTIVES

**CHSW-** Increase the percent of staff certified through the Arizona Administrative Office of the Courts to 35% by FY2018.

- ✓ 25% of staff is certified through the Arizona Office of the Courts.

**CHSW-** Reduce the ratio of client to case manager to 30:1 by FY2018.

- ✓ 42:1 is the current Client to Case Manager Ratio.

**CHSW-** Increase the number of Cremation spaces to 1,000 by FY2018.

- ✓ Currently, there is 325 cremation spaces.

**CHSW-** Decrease the number of days to complete inventories and estate sales to 10 days by FY2018.

- ✓ Currently, it takes 20 days to complete inventories and estate sales.

Strategic Plan: [www.yumacountyaz.gov/strategicplan](http://www.yumacountyaz.gov/strategicplan)



## PERFORMANCE REPORTING

Performance Measure Actuals & Benchmark - Public Fiduciary					
The following measures are departmental priorities identified in the County-wide Strategic Plan:					
Department Goal:	Target/Benchmark				
Measure:	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 Cremation spaces.	325	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

## AUTHORIZED FULL TIME EQUIVALENTS

Authorized Positions by Major Function				
	2012-13	2013-14	2014-15	2015-16
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
<b>Total</b>	<b>8.00</b>	<b>8.00</b>	<b>8.00</b>	<b>8.00</b>

There are no staffing changes for FY15/16.

## 2016 ANNUAL BUDGET

**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 2012-13	Actual 2013-14	Budget 2014-15	Estimate 2014-15	Budget 2015-16	% Change
<b>Sources</b>						
General Revenue	\$ 526,001	\$ 515,116	\$ 629,258	\$ 629,204	\$ 637,867	1.37%
Special Revenue	-	-	-	-	-	N/A
Balance Forward	-	-	-	-	-	N/A
<b>Total Sources</b>	<b>\$ 526,001</b>	<b>\$ 515,116</b>	<b>\$ 629,258</b>	<b>\$ 629,204</b>	<b>\$ 637,867</b>	<b>1.37%</b>
<b>Uses</b>						
Personnel	417,188	377,760	481,596	481,596	488,761	1.49%
Supplies & Services	108,813	137,356	147,662	147,608	149,106	0.98%
Capital Outlay	-	-	-	-	-	N/A
Debt Service	-	-	-	-	-	N/A
Reserves & Contingencies	-	-	-	-	-	N/A
<b>Total Uses</b>	<b>\$ 526,001</b>	<b>\$ 515,116</b>	<b>\$ 629,258</b>	<b>\$ 629,204</b>	<b>\$ 637,867</b>	<b>1.37%</b>
<b>Other Sources &amp; Uses</b>						
Transfers In	-	-	-	-	-	N/A
Transfers Out	-	-	-	-	-	N/A
<b>Total Other Sources &amp; Uses</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>N/A</b>
Other Restricted	\$ -	\$ -	\$ -	\$ -	\$ -	N/A