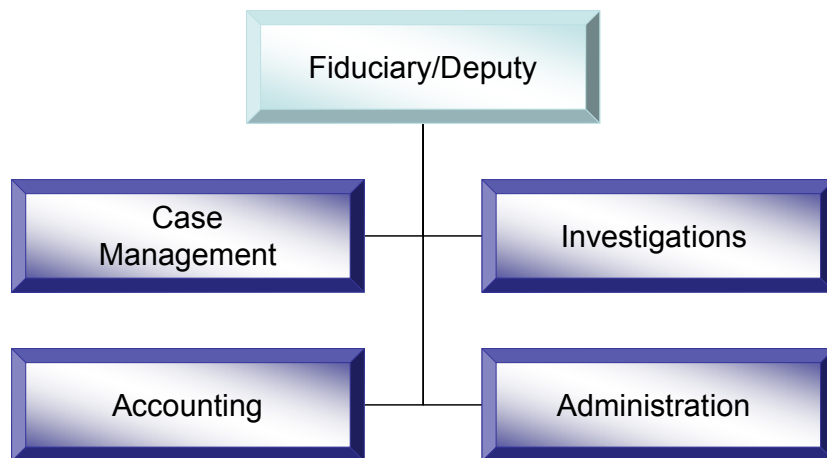


## Mission Statement

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.

## Services

**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. Burial is provided for indigent persons.

**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.

# FIDUCIARY



## Performance & Service Levels

### Performance Measure Actuals & Benchmarks - Public Fiduciary

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

Department Goal:	Actual	Current	Benchmarks		
Measure:	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012
<b>To provide comprehensive public fiduciary services.</b>					
% of pre-1990 cases closed	30%	50%	75%	100%	100%
% of client files audited annually for accuracy	0%	0%	25%	75%	100%
% of old files purged and shredded	0%	0%	20%	30%	40%
% of indigent burials paid for by heirs/assets	0%	0%	50%	100%	100%
# of plots available to meet annual indigent burial needs	48	50	52	54	56

## Expectations

### ACCOUNTING:

- To provide comprehensive public fiduciary services:**  
County Strategic Goal: Community Health, Safety and Well-being.  
Objective: Increase the % of pre-1990 cases closed.  
Status: Currently, 50% of the cases are closed.  
Strategy: Prepare accountings and receive approval from Superior Court to close case files.

### ADMINISTRATION:

- To provide comprehensive public fiduciary services:**  
County Strategic Goal: Community Health, Safety and Well-being.  
Objective: Increase the % of client files audited annually for accuracy.  
Status: Currently, no files are being audited annually for accuracy.  
Strategy: Spot check cases for assets, implement an asset video recording process and review 25% of files quarterly.
- To provide comprehensive public fiduciary services:**  
County Strategic Goal: County Resources.  
Objective: Increase the % of old files purged and shredded.  
Status: Currently, no files are being purged and shredded.  
Strategy: Establish and implement a records retention system.

## Expectations (Continued)

### INDIGENT BURIALS:

- | **To provide comprehensive public fiduciary services:**  
County Strategic Goal: County Resources.  
Objective: Increase the % of indigent burials received that are paid for by heirs/assets.  
Status: Planning to begin researching heirs/assets in FY09/10.  
Strategy: Add one Indigent Burial Specialist to conduct the necessary research.
- | **To provide comprehensive public fiduciary services:**  
County Strategic Goal: Community Health, Safety and Well-being.  
Objective: Maintain a sufficient number of plots available to meet annual indigent burial needs.  
Status: Currently have an annual allotment of 50 plots available.  
Strategy: Partner with local cemeteries, utilize cremation as an alternative to burial (Arizona Revised Statute 36-831).

## Initiatives New for 2010

### Investigations:

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

## Initiatives Prior Year Status

### Administration:

- Research the requirements for record retention and carry out the procedure for all files.  
**Status:** Ongoing

# FIDUCIARY



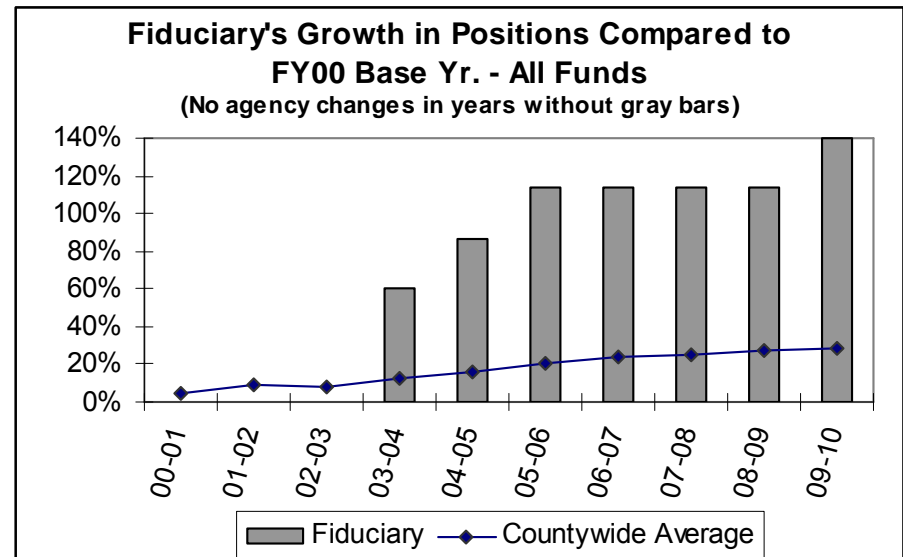
## Staffing Levels

Authorized Positions by Major Function				
	2006-07	2007-08	2008-09	2009-10
Director and deputy	2.00	2.00	2.00	2.00
Case management	2.00	2.00	2.00	2.00
Indigent Burial	0.00	0.00	0.00	1.00
Investigations	1.00	1.00	1.00	1.00
Accounting	2.00	2.00	2.00	2.00
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>9.00</b>

Authorized Positions by Classification				
	2006-07	2007-08	2008-09	2009-10
Public Fiduciary	1.00	1.00	1.00	1.00
Deputy Public Fiduciary	1.00	1.00	1.00	1.00
Indigent Burial Specialist	0.00	0.00	0.00	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	2.00	2.00	2.00	2.00
Office Specialist I	1.00	1.00	1.00	1.00
<b>Total</b>	<b>8.00</b>	<b>8.00</b>	<b>8.00</b>	<b>9.00</b>

The department is adding 1.0 Indigent Burial Specialist position in support of the Strategic Plan goal “To provide comprehensive Public Fiduciary services”.

All positions are funded by the General Fund. Grant funds are not typically available for functions performed by the Fiduciary.



The Fiduciary's staffing levels have increased 140% since fiscal year 1999/00. This is higher than the “County average” of 28.8%; and was a direct result of a huge spike in demand in fiscal year 2003/04. The department housed 3.75 positions in fiscal year 1999-00.



## Funding Levels

Approximately six 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:** The increase in the personnel budget is primarily due to the addition of one Indigent Burial Specialist.

**Supplies and Services:** The net increase Supplies and Services is due to the reallocation of the Burials line item from the Health Department as well as Software related to the Indigent Burial Specialist position.

**Capital outlay:** There is no capital outlay budgeted for this fiscal year.

	<u>Actual 2006-07</u>	<u>Actual 2007-08</u>	<u>Budget 2008-09</u>	<u>Estimate 2008-09</u>	<u>Budget 2009-10</u>	<u>% Change</u>
<b>Sources</b>						
General Revenue	\$ 450,141	\$ 474,377	\$ 528,006	\$ 512,450	\$ 616,814	16.82%
Special Revenue	-	-	-	-	-	N/A
Balance Forward	-	-	-	-	-	N/A
<b>Total Sources</b>	<b>450,141</b>	<b>474,377</b>	<b>528,006</b>	<b>512,450</b>	<b>616,814</b>	<b>16.82%</b>
<b>Uses</b>						
Personnel	372,575	395,153	433,866	421,429	444,776	2.51%
Supplies & Services	53,977	51,629	94,140	91,021	172,038	82.75%
Capital Outlay	23,589	27,595	-	-	-	N/A
Debt Service	-	-	-	-	-	N/A
Reserves & Contingencies	-	-	-	-	-	N/A
Transfers In & Out	-	-	-	-	-	N/A
<b>Total Uses</b>	<b>\$ 450,141</b>	<b>\$ 474,377</b>	<b>\$ 528,006</b>	<b>\$ 512,450</b>	<b>\$ 616,814</b>	<b>16.82%</b>
Other Restricted	\$ -	\$ -	\$ -	\$ -	\$ -	N/A