MARICOPA COUNTY
DEPARTMENTAL QUARTERLY REPORT

3rd Quarter Report, FY 1999-00
Sandi Wilson, Deputy County Administrator

Goals	Accomplishments/Comments
OFFICE OF MANAGEMENT AND BUDGET	
Assist the County Administrative Officer with routine issues and assigned projects as a member of that office.	
Oversee more routine issues for the County Administrative Officer including discussions with Board offices, Elected Officials, and Appointed Department Directors and Chief Officers.	• Negotiated a resolution for leased space between the Flood Control District and Human Services department. • Reached an agreement with the Judicial Branch and criminal justice departments on the implementation of three new court divisions. • Negotiated various outstanding budget issues with appointed, elected, and judicial officers.
Assist with weekly Board briefings and fill-in at Board meetings when the CAO is unavailable	• Filled-in at Board meeting, as required. • Attended various Board briefing on issues, as needed.
Coordinate with Norm Hintz on the Master Space Planning Project.	• Participated as a member of the Downtown Complex Master Plan Committee. • Participated as an observer to the various space committees. • Work with Facilities Management on the new policy to review funding requests. • Participate for the CAO's office on the Facilities Review Committee.
Remain primary financial liaison to the MIHS.	• Attend Quorum meetings bi-weekly
Direct the performance-benchmarking project, Countywide and incorporate into budgeting, training, strategic planning and performance incentive plans.	• Through OMB and Planning and Training, the performance benchmarking project has been incorporated in all aspects of budgeting, training, etc. All research reports issued by OMB contain requirements for performance measures to provide results and accountability for the appropriate expenditure of taxpayer dollars. • Work on the 1st Quarterly report was begun. • The Performance Measurement Steering Committee met monthly on various issues.
Direct the Office of Management and Budget in fiscal year 1999-00 and oversee the development of the 2000-01 budget.	
Negotiation budget agreements with Elected Officials and the Judicial Branch for the CAO.	• Negotiations will occur in the third quarter of FY 2000. Preliminary budget issue programs for Capital Improvement Projects, Significant Technology and Compensation have begun. Submissions from departments are expected in November.
Direct the Budget Manager and Executive Information Manager regarding issues during the fiscal year.	• Additional projects from Board members, departments and County management has increased the research and analysis support provided by the Office. The Office has produced 12 research projects on a variety of issues and topics in the first quarter of this fiscal year. These reports are in addition to day-to-day budget and agenda assignments.
Procure a budget development and maintenance system and partner with the CIO Office.	• The RFP for the budget development and maintenance system was issued in September. Proposals from vendors were due on October 12, 1999. Vendor demonstrations are scheduled for the first week of November. Selection of a vendor must occur by mid-November in order for the contract to be awarded in December and the selected vendor to start in January 2000. During this budget season, the prior budget maintenance system has been reactivated and distributed to departments.
Oversee the development of the business plan and the 15-year financial forecast.	• Completed the development of the FY 1999-00 Business Plan, which included the updated 15-Year Financial Forecast.
Ensure a structurally balanced budget with conservative revenue projections and an overall property tax rate which is the same or lower than 99-00.	• OMB, working with Elliott Pollack & Associates, has been active in obtaining tax data that will allow revenue projections from all sources to be as accurate as possible.
Support and develop performance budgeting philosophy.	• The performance budgeting philosophy has been incorporated in the FY 2000 budget. The first step toward total performance based budgeting was started by including performance measures and requesting actual results each quarter. Further

	development of the program is in the planning stages for incorporation in FY 2001.
Support the agenda process and review of items within OMB.	• Reviewed agendas for accuracy and fiscal integrity. • Recommended various changes to the on-line agenda system, Agenda Central, to the Clerk of the Board. The modifications would make the system more user-friendly and eliminate the need to reject items due to incorrect or incomplete financial information.
Ensure that publications are completed on time and with accuracy. These include the Financial and Personnel Resource Report and the Annual Business Strategies.	• Developed, printed and distributed the Financial & Personnel Resources 4th Quarter/Annual Report for FY 1998-99. • Completed the FY 1999-00 Annual Business Strategies document (slated for printing and distribution in October 1999). • Developed 1st quarter DCA newsletter. • Developed, printed and distributed the Financial & Personnel Resources 1st Quarter Report for FY 2000-01.
Completion of Research Reports and other special financial analysis, as required.	• Completed a personnel savings analysis on FY 1998-99 data in order to develop a Personnel Savings Policy which OMB recommends the Board approve for departments to utilize in developing their personnel services budget beginning in FY 2000-01. • Analyzed the Phoenix Union High School District request to the Board of Supervisors to exceed their budget. This also included the development of a new policy which schools must adhere to in the future which was approved by the Board. • Analyzed the FY 1998-99 Performance Incentive results against FY 1998-99 budget, expenditure forecasts, and actual expenditures. • Completed Research Reports for the following issues: Indigent Burial Program; Pretrial Services; Three Court Divisions; Southeast EDC; General Fund Support for County Attorney Auto Theft Program Grant; Tax Levy; 15-Year Forecast; Open Space Acquisition Plan and Effects on Tax Rate; Justice Court Gila Bend IGA; Teen Court; County Attorney Quad E; Slum Lord Mandate; Performance Measure Reporting – final FY 1999-2000 and 1st Quarter Results – Memo and supporting data requesting results issued to departments. • Completed analysis on the Current Competitive Analysis Policy and recommended the Board of Supervisors abolish the policy and replace it with a philosophy statement that Maricopa County will strive to be the least cost supplier of service to its citizens. • 1st quarter audits performed of Non-Profit Economic Development contract compliance at Greater Phoenix Convention & Visitors Bureau, Bidsource and Maricopa County Sports Commission. • Developed 1st quarter non-profit contract compliance report for the Board. • Completed Non-Profit Economic Development Contracts, including preparation of agenda item wording which included exceptions to the Board policy. • Performed fiscal review of Co-operative Extension additional funding request. • Recommended modifications to Department of Finance's Policy for Accounting for Expenditures. • Developed 2nd quarter non-profit contract compliance report for the Board. • Analyzed 338 legislative bills for fiscal impact. • Analyzed 19 audits performed by the Maricopa County Internal Audit Department and detailed those audit findings that had fiscal impacts. • Completed a research report on Indigent Burial reimbursement rates, and determined that rates should be increased 5% and that new safety procedures should be implemented. • Completed a research report determining that Maricopa County should increase funding for Cooperative Extension so that their Master Gardener and 4H programs can continue to grow with the increasing population of Maricopa County. • Developed a draft travel exemption policy that is currently under review by County management. Departments who allow reimbursement greater than the Federal Per Diem would have to file a quarterly report with the Office of Management and Budget.
Other projects, as required.	• Completed the 4th quarter compliance review of the FY 1998-99 Economic Development contract monitoring process. • Developed and negotiated Economic Development contracts with the Greater Phoenix

	Chamber of Commerce, the Greater Phoenix Convention and Visitors Bureau, and the Maricopa County Sports Commission, which were ultimately approved by the Board of Supervisors on October 4, 1999. These contracts included an accountability aspect never before included in such contracts. • Addressed County Attorney issues regarding turnover. • Developed Mandate Study spreadsheet files and instructions for departments, which were included in the FY 2000-01 department budget packages. • Surveyed 10 largest counties population, real estate tax info, revenues, expenditures and mandates for District 1. • Developed PowerPoint presentation of comparison of exit interview data for FY 1998-99 with department data supplied by Maricopa County's Research and Reporting Department. • Participated on the Economic Development Strategic Planning Committee whose goal was to develop a strategic plan which the Board of Supervisors would use as a guidepost in approving contracts with local agencies for economic development services.
ORGANIZATIONAL PLANNING AND TRAINING	
Institutionalize learning for all of Maricopa County and facilitate strategic and business planning Countywide.	
Continue delivery and continuous improvement of the Supervisor and Manager Schools and employee training programs.	• Held two sessions of MCMI Supervisor School • Held two sessions of MCMI Manager School • Conducted a retreat for 80 Adjunct Faculty members at Pueblo Grande Museum • Held Zenger-Miller Train the Trainer sessions certifying 7 adjunct faculty. • Installed Registrar upgrade; trained users • Moved Registrar to new server • Delivered two sessions of *Coaching to Improve ROI on Training* • Continued development of *Performance Management* curriculum • Commenced discussions with HR on improvement of employee discipline-related course • Began planning and development for New Supervisors Survival Course • Began planning for move of New Employee Orientation to OPT from HR • Analysed number catalog course cancellations to course offerings and developed strategy to reduce number of cancelled courses
Oversee the Maricopa County Tuition Reimbursement Program and ensure proper funding of the program.	• Sponsored on-site educational programs through collaboration with Rio Salado College, *certificate program in Public Administration*; NAU, *Masters in Human Relations*; and Western International University, *Masters in Public Administration.* Began offering a *Bachelor's Degree in Public Administration* through WIU. • Secured WIU undergraduate credit for MCMI Supervisor School graduates • 161 employees were reimbursed for 203 classes at a cost of $109,918.
Facilitate and support organizational change efforts and innovation at departmental and executive levels.	• Consulted with the Housing Department on Performance Management. • Completed development with Research & Reporting of materials for departments to use in the implementation of post-employee satisfaction survey improvements • Planned the Spring Management Team Retreat • Provided assistance to DoME and Health Care Mandates on a wide variety of issues. • Provided team development support to Research & Reporting and consultation to Housing and Environmental Services. • Proposed five Innovation-related programs to Management Team • Participated in the development of the *Ethics @ Work* EBC site • Participated in the delivery of an Ethics seminar for employees of the Animal Control Department • Updated Management Resource Center information on EBC site
Pilot the mentoring and career planning program and support the roll-out within the County structure.	• Mentor Program Coordinator continued program development • Program coordinator held discussions on a pilot project with DOME training staff • Began planning for movement of Career Planning Program from HR to OPT

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Support and direct the strategic planning process with all levels of County government to coordinate with the Performance Measurement Project.	• Created and distributed new "Strategic Vision" publication in support of department's strategic planning efforts • Facilitated Strategic Planning with Flood Control and Public Fiduciary. • Held preparatory strategic planning meetings with Indigent Defense • Worked with Northwest Valley Community Council on the development of a new social service center in the NW Valley
Coordinate with OMB on the Performance Budgeting Project and encourage integration of measurement and accountability into the culture.	• Participated in RAP introductory sessions with the leadership team from five of the pilot entities. • Participated in ISIS project initial meeting • Attended seminar on the integration of performance measures into the budget process • Conducted strategic planning and performance measures classes for catalog classes • Continued activity with the Performance Measures Steering Committee and began to evaluate selected departmental strategic plans with OP&T staff
HUMAN RESOURCES	
Lead and direct Human Resource initiatives, and develop innovative ways of dealing with the personnel issues facing the County.	
Mobilize the free flow of data, resource information, and reference materials to empower employees and managers as decision-makers.	• Explored the feasibility of redesigning/reformatting the weekly EEO list to allow for enhanced sorting capabilities • Identified strategy for analysts to obtain exit interview data to allow for proactive interventions with customer departments. • Implemented prompter posting of "internal" job listings on the EBC. • Surveyed and updated contact and demographic data for all external EEO list recipients. • Analyzed records retention data for former employees to assess on-going value of researching former employee record cards. • Implemented electronic data compilation and posting for division activity reporting
Recruit, conduct pre-employment assessments, and assist customer departments in meeting staffing needs.	• Compiled report summarizing results of employee survey concerning recruiting and selection experiences. • Expanded resource directory of non-traditional staffing sources and converted to a computer database. • Implemented fax-back feature to the recorded job line. • Processed over 4,287 requests to fill positions from customer departments. • Referred 18,220 candidates to departments to meet their staffing needs. • Processed over 25,936 employment applications • Compiled and communicated the results of the FY 98/99 staffing turn-around report to evaluate timeliness of process to certify eligible candidates to operating departments. (Results reflected that during FY 98/99, the division received 3,154 Personnel Requisitions that involved 5,835 position requests. The average (mean) number of calendar days involved from HR's receipt of requests to the dates customer departments received a list of certified candidates was 9.4 days. • Developed and coordinated the implementation of "on-the-spot" Sheriff's Deputy application/testing process.
Provide guidance, clarification and training on Merit Rules, HR policies and procedures and employment laws.	• Reviewed MCMI "Staffing" module and developed Facilitator's Guide to ensure consistency in the delivery of information. • Offered on-site training to customer departments in conducting successful employment interviews. • Presented information on Merit Rules, employment laws, and staffing at MCMI. • Reviewed and revised "Harassment & Inappropriate Behavior" training course available to all employees. • Offered a variety of employment-related courses through OPT's catalog.
Administer employee relations program, including career development and Career Center, offering guidance to employees and supervisors on	• Reviewed and revised investigation procedure. • Designed a consolidated case tracking database. • Conducted 24 confidential investigations/reviews of alleged misconduct. • Coordinated responses to 6 EEOC charges of discrimination.

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performance problems, grievances, and disciplinary actions. Conduct confidential investigations/reviews of alleged misconduct.	• Offered Career Center orientation to 6 employees affected by reductions in force.
Coordinate activities of the two Merit Commissions	• Tracked all disciplinary actions to determine percentage appealed. • Coordinated 16 employee requests for Merit Appeal Hearings. • Explored the feasibility of providing the Commission meeting information to the members electronically.
Administer specialized case management programs and ensure compliance with disability laws.	• 2 MCMI class, attendance 52 • 1 Leave Plan, attendance 6 • EAP counseling, 53 • 5 EAP training, attendance 78 • EAP consultations, 125 • EAP crisis/trauma 19 • Revised the training materials for STD/LTD Donation of Leave and created an answer sheet for departments to assist them in completing the forms accurately to improve response time from the providers. • Consolidated STD/LTD Donation of Leave with Case Management.
Offer programs, services, resources, and training to support employees' balanced lives and which enhance health, morale, productivity, and organizational knowledge and commitment.	• Coordinated 2nd Annual Maricopa County Picnic • 6 NEO classes, attendance 252 • Installed a new register to accommodate our accounts and provide the ability to track and report returns vs. sales on N.E.S.R.A., • Created and implemented a system for the distribution of renewed bus cards • Faxed out 573 applications/announcements • Distributed 225 City of Phoenix Bus Cards and 96 All Aboard America Cards • County Store Sales: $ 33,894.00 • Trip Reduction Survey, with an 84% response rate. • Passed the Trip Reduction Visitation audit conducted by Environmental Services. • Recognition luncheon for Trip Reduction Coordinators • Started Vanpool in MCSO • Employee book fair • 1 Weight Watchers classes, attendance 35 • 2 Cholesterol Screenings, attendance 58 • 2 Health Screenings, attendance 40 • 1 Smoking Cessation Classes, attendance 15 • Started cooperative Wellness program planning with City of Phoenix • Taught 3 Healthy Back Classes with average of 9 participants • Started recipe of the week along with Health tip of the week through email • Implemented tai chi classes in Downtown complex and Durango • Implemented yoga classes in Downtown Complex • Held brown bags on various topics (had average of 15 people for each one) • Participated in Safety Fair and completed 50 cholesterol tests along with other health assessment modules. • Assisted in planning and purchasing of exercise equipment for MCDOT NW Yard
Administer a customer service center	• Set up a database to keep department current on all donations of leave and reduce the time and cost of paper tracking. • Performed training for DOL/STD/LTD to departments. • Revised the donation of leave form • Instituted new cash handling procedures. • Created a tracking system to track county store sales by item count and transaction count. • Worked with insurance providers to report monthly dollar amounts for benefits issued and number of claims.

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Coordinate an annual HR/OMB retreat for customer departments.	• Coordinated the 2nd annual fall liaison retreat. Over 200 departmental personnel, payroll and budget liaisons attended over 20 results-oriented sessions. Topics included unemployment cost control, position management, records retention, workflow strategies, and budget preparation. • Key retreat sessions presented by E.I.S. were: Surviving A Personnel Records Audit and Surviving A Payroll Audit. The expected results are the reduce errors, decrease required time of processing, and to receive no audit issue items. • Facilitated the semi-annual departmental payroll liaisons meeting where the much-improved liaison manual was distributed. This "how-to" manual was revised to help reduce the time required for processing a more accurate payroll.
Partner with customers to assess information needs and service satisfaction levels.	• Partnered with EBC to put payroll and records forms on the EBC. • Rolled out HRMS for current HRMS users to use as a temporary information resource to replace HR INFO. • Partnered with Judicial Branch to implement their two newly revised leave plans. • Completed the annual review of credited service for leave accrual purposes and distributed memos to the 8,000 plus leave eligible employees, communicating their leave benefits. • Expanded communications with department directors to explain reasons for HR functions and process/procedure changes. • Initiated the publication of the "Jefferson Street Journal" and distributed several editions to managers and personnel liaisons. • Created and published the "County Chronicle" to disseminate information quickly to all employees utilizing the EBC. • Distributed Teleworking Policy. • Moderated Teleworking Panel for the second annual MCMI Supervisor Retreat. • Partnered with Office of Management & Budget, Finance and Administrative Technology Center to finalize the fiscal year end process. This process ensures that positions and employees are paid in accordance with the County's Fully Funded Position Policy. • Assisted Office of Management & Budget in its RFI process for a new budget application software vendor. • Completed phase 1 of the Financial Management Information System (FMIS) reporting review in partnership with the consulting firm McGladrey & Pullen. • Completed the feasibility of using HRMS to track FMLA hours. As delivered, the HRMS system will not provide cost effective functionality to track FMLA hours. It will require duplicate time input. • Facilitated another HRMS on-line screen class for HR and ATC employees. • Added new earnings codes for new differentials (shift, multi-lingual). • Coordinated United Way pledge form process and oversaw all United Way data entry. Portia Lomax personally audited over 2900 pledge forms in record time. She also provided daily reports to management reflecting pledges and special event funds. • Successfully processed all salary advancements and applicable retroactive payroll adjustments with no delay.
Establish, maintain and manage employee records and respond to public record requests.	• Recommended Records Retention Schedule submitted to Records Coordinator with Materials Management. • Completed 98% file renovation process. This included new file folders and file label. This was necessary due to labels coming off and file folders tearing. Stronger file folders and label protectors are being used. • Nine 5-drawer file cabinets were added to the employee personnel records room. To accommodate the increasing volume of records The file room is currently at capacity. • A new in-processing guide is 95% complete. The guide is expected to train new liaisons and to reduce the problems associated with time delays in getting required new hire documents. • Completed the employee records file transition, color coding all active employee files.
Provide countywide payroll services	• Annual tax reconciliation was completed in record time of 1 hour. • W-2 documents were made available to employees 1 week earlier than in the past.

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	• Completed cash management plan and forwarded to Department of Finance for review. • Finalized legislative agenda requests for Board consideration. • All Payroll Coordinators attended the cash management class. An action plan will be developed and implemented in the 3rd quarter. • Coordinated year-end processing for HRMS, requiring less time and experiencing fewer problems. • Successfully completed the final payroll and balancing required for year-end in record time. • Recruited for and filled two vacant positions.
Proactively adhere to employment laws and regulations and effectively manage risks facing Maricopa County, its employees and customers.	• A plan to systematically review and update the FLSA status of every County position is under development An action plan has been developed to review the accuracy and appropriateness of the use of the "unclassified" status under the Merit Rules. • Successfully completed a settlement of an overtime claim from the U. S. Department of Labor and held total costs to under $2,300.
Offer technical guidance to customer depart. relating to equitable and competitive compensation strategies.	• A draft test for the Journey level of the multi-lingual differential has been developed, and is currently under review • Have worked with the Superior Court Human Resources office to develop a standard procedure for handling compensation-related issues from all of the Judicial Branch, to be coordinated through the Superior Court Human Resources office • Management and departmental liaison training on the usage of the various pay differentials has been developed and scheduled for the month of October.
Other activities and accomplishments:	• Completed over 11,000 requests for salary advancements, including over 2,600 merit and market increases for judicial branch employees. • Processed 260 requests for special work assignments. • Reviewed special work assignments currently in place to ensure that renewals for the current fiscal year are in place. • Preparing a new update of market data available on the EBC, which will include information on 14 broad market ranges and over 500 department-specific working titles • As a result of input from an organization-wide Employee Recognition Committee, developed a service pin plan to recognize length of continuous service with the County, including design, bid proposals, and projected costs • Based on input from same Committee, developed a proposal and basic outline for an organization-wide employee recognition program with suggested categories, definitions, and proposed awards. • Have partnered with OMB to collaboratively review all compensation-related budget issues for FY2001, and have provided detailed analysis, recommendations and proposed strategies on how to proceed with every compensation budget issue received.
HRMS Enhancements:	• Benefits completed testing info with HRMS and expanded provider information will go live10/1. Dependent/beneficiary information is still in testing. This additional information will allow benefits to conduct full electronic enrollment and eligibility checking with our major healthcare vendors. • Wellness codes for potential awards planned for development in 2nd quarter 2000 by HRMS/payroll. • ATC/HRMS review of system capability for percent contribution to 457 vs. flat dollar amount being review for potential implementation by 4/1/00 • Physician codes, dependents, and beneficiaries are now live entry fields in HRMS and being entered by benefits administration. This will potentially allow for full electronic eligibility that will bring greater efficiencies for Benefits administration.
Customer Service phone system	• New ACD layout and services come on live 1/10/2000 includes greater ease and quicker access to information and staff.

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Open Enrollment 2000-2001	• Successful completion of OE2K, 4200 electronic transactions by employees directly versus 1479 last year with only 800 paper versus 2278 last year. This process saved us about $40K over last years paper distribution costs including the addition labor and error costs of inputting 3 times the amount of paper. • Conducted Separate communication to Community Connection members whose coverage terminated. • Completed Online Open Enrollment with great efficiency and positive response from employees. Nearly 3000 enrollments processed. 60% of enrollments input by employees with remainder input by benefits staff to EBC. Vendors except one received electronic files for eligibility and enrollment • Open Enrollment 2000 generated the following enrollment results: Cigna Health Care Center Physician: 2,853; Cigna Private Practice Plan Plan: 4,784; Cigna Helath Care Center Physician SightCare: 629; Cigna Private Practice Plan Physician SightCare: 1,382; Health Select: 1,251; and Medical Declined: 1,574. • After two rounds of meetings, CIGNA and the County are very close to completing agreement on plan redesigns and rate increases that are ½ the potential market increases if we bid. Plan redesign is based on competitive trends in plan features and greater cost sharing in high cost medical care areas, such as, drugs, hospitalization.
HR Liaison/Benefit Council	• Benefits Is Producing Three Sessions On Long Term Care, Provider Customer Surveying, and Pay-Out Options For Deferred Comp. • The Long Term Care product offering continues to be developed. Employee benefit Council members attended presentations by several major players in this insurance market. The Benefits Division is planning a panel discussion at which 4-5 of the major players will attend to help increase employee understanding before the benefits division conducts a bid for carriers to provide this voluntary coverage to employees.
Retiree benefits seminar	• Retiree benefits administrator has developed retiree benefits brochure and is developing seminar series for quarterly training for employees considering retirement with three months. This will be merged with session being developed by Nationwide Investment Services concerning retirement pay-out options.
NEO revision	• Benefits coordinators have redesigned their NEO at the MIHS facilities and have developed new surveys to assess effectiveness of NEO and training of employees in NEO. This is all done so that employees will appreciate the benefits provided and to improve customer service satisfaction in the future. The presentations at downtown remain the same. Once we have a baseline of surveys under the old approach we will move the downtown presentation into the new format.
Student/Dependent coverage cutoff tracking	• Benefits administration has taken on responsibility on monthly basis to notify employees that their dependent student children and those non-student dependents are going to be cutoff from coverage unless student documents are submitted. This is great improvement over loss of coverage after claim denial notification conducted by CIGNA. • Advent of new commercial HMO administration at CIGNA will take this administration back into CIGNA 1/1/2000.
Evaluate and revise contract for short-term disability insurance.	• Bid conducted but did not result in qualified bidders. • Board approved extension of current STD admin. with Unum. • OE99 resulted in increase to benefits max from $1500 biweekly to $2000 biweekly. • Bid for 2000 is now being developed for release and completion before 1/1/2000. • New bid will be run in first quarter.
Develop process to conduct annual survey of employees' satisfaction with benefits.	• To date, three separate surveys and over 10 focus groups have been completed surveying employee benefits satisfaction. • Issued Department level benefits survey results to all Dept. Heads • Developed complete Survey Report chronicling surveys since 1995 with most recent survey including range of criteria cuts of population to go to County Supervisors and top management.
Revision to Benefits/Risk Management Trust	• Meet with head of finance to review EB division participation in risk trust. Presently reviewing trust document for update, presentation to Risk Management Trustees in January and removal of fully insured contracts from trust.

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	• Met with Board recently. Benefits continues as part of trust at the pleasure of the Board. Trust document has been redrafted to reflect that decision. • Recently met with OMB to change funding of benefits from Risk Trust into general fund and out of ISF accounts. • Working with Finance and HRMS to see that payroll transactions are properly reflected into general ledger accounts. • Benefits met with the Risk Trust Trustees to transition the insured benefit plan out of the trust and into a balance sheet accounting system.
Improved EB Communications and Customer Service	• Benefits Division has continued to enhance our Intranet Site by adding preventive health links, plan forms, life plan document, and other Internet links such as the new Deferred Compensation Administrators. We also deleted out of date information on our Internet site so that public information is current. We are now working with HR Web administrator to bring on current benefits information. Set permanent link to benefits site on the MIHS Internet site. • Introduced single source customer service access via new ACD phone lines,61010, which includes both plan information, message taking, access to senior staff, and fax back capability for most benefit forms. • Introduced single source email address under "Benefits Service" global/public/Internet addressing to access benefits staff.
Bid Group Auto	• Current auto insurance program is being put on hiatus, current members will moved to a direct pay status in the program and taken off payroll deductions. Benefits will reconsider a bid for auto and homeowners insurance program in the 4th quarter.
Deferred Comp. RFP	• We are continuing to move forward with providing participants chance to set their contributions as percentage of salary. Benefits and Payroll is meeting soon with new deferred compensation administrator to make this happen. • The new 457 contract was awarded to Nationwide Retirement Solutions (NRS). This included finalizing new plan administration and trust agreements. The new program offers improvements and enhancements in quarterly statements and reporting of fund balances,on a share and not unit value making it easy for members to compare their accounts to market prices of mutual funds. In addition, a new option to access 1900 mutual funds and other equity and bond funds that are not part of the core program in partner ship with Charles Schwab, Inc.; will begin 5/1/2000. In addition to letters sent to participants' homes, Employee Benefit sent out similar letters to all employees on blast email and included a schedule of information tables that were conducted around the County by Nationwide Retirement Solutions (NRS) and benefits staff to explain further the plan improvements.
Developed Benefits Benchmark group and Competitive Survey	• Developed EB competitive survey against benchmark group and conducted first section regarding life and disability coverages. Remainder of survey is to be conducted over next 4 to 6 weeks. • Benchmark survey completed with last two months. • Also recently completed cost of benefits ratio to payroll for outcome tracking purposes. • Benefits is waiting on release of survey 'Value Index" from our consultant for results of survey of benchmark companies. • Received Value Index from Consultant and reviewed. Is good source of discrepancies in benefits staffing and plan provisions for future planning. • Benefits has recently begun surveying the benchmark group for benefit plans on their contribution schedules and will be producing information to employees regarding comparison of our program with the benchmark employers. We have also replaced two private sector companies in the group who were not cooperating in the survey with two best practices companies who have similar markets.
Other activities	• SouthWest Health Alliance Coalition steering committee has been expanded to 5 members, 3 government and 2 private sector companies. A legal name of Southwest Health Alliance has been set. It will short be incorporated as a 501c non-profit organization. The first project to be conducted will be a Healthcare Quality, Disease Burden, and Employee Productivity survey. The state of Arizona has expressed interest in keeping track with the development of the Southwest Health Alliance.

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DEPARTMENT OF MEDICAL ELIGIBILITY	
Oversee the Department of Medical Eligibility while ensuring quality AHCCCS enrollment through cost effective methods.	
• The Department of Medical Eligibility is currently being re-structured. The fourth quarter will have new information.	
HEALTH CARE MANDATES	
Direct the General Fund County health care liabilities through effective administration of mandated health care issues.	
Manage ongoing Health Care Mandates matters	• Worked with OMB on department budget. • Processed routine payments (SAIL Grant, Teaching Subsidy, Mental Health Orders). • Met with Supervisor Brock re MIHS issues • Completed Managers' School
Transition MIHS and CHS to a fee-for-service billing arrangment.	• Formed four-department team to identify causes for increased MIHS charges and to review CHS utilization, including reasons for aberrant beddays. Team members are from MIHS, CHS, MCSO and OMB/Healthcare Mandates. • Determined aberrant beddays to be a key (but not the only) cause for over-utilization and increased charges. In turn, identified causes for aberrant beddays, such as problems with transportation, pre/post-hospitalization housing and prior authorization. • Drafted plan for reducing aberrant beddays, including new work processes for prior authorization. • Targeted July 1,2001 to switch to FFS claims payment (with a cap still to be set), at least on a shadow basis.
Assume responsibility for HBOC Contract Administration	• Met with Lee Livin and HBOC representatives re responsibilities. • Reviewed monthly reports • Met with Lisa Gardner re contract payment and status issues. • Attended Finance Committee Meeting re Internal Audit report.
Assume responsibility for overseeing Deloitte consulting contract	• Extended Deloitte contract for a one-year term. • Coordinated cost projection for new contract year and FY 2001. • Centralized payment, expenditure tracking and assignments. • Completed payment for contract year ending 3/31/00.
Oversee the Quorum (IRG) contract and related matters.	• Attended bi-weekly IRG briefings, monthly MIHS board meetings, MIHS Finance Committee meetings, MIHS administrative team meetings, MIHS Strategic Planning committee meetings and other regularly scheduled meetings. • Reviewed/compared contract deliverables and MIHS management, operational and strategic plans. • Reviewed/processed IRG invoices. • Completed IRG MIHS incentives package; Approved by BOS on 3/15/00. • Coordinated outside review of three-year forecast and plan for ongoing review. • Coordinated outside review of Avondale/Cath Lab forecast (in process). • Coordinated outside review of MIHS 2001 budget. • Worked on Amendment No. 2 to IRG contract to accommodate tax law consideration.
Liaison with County departments and state agencies on various health care mandate issues.	• Reviewed/commented on numerous legislative items. Worked with Rory Hays, Mark Hillard, Chris Bradley, Linda Mushkatel, Christine Holloway, Government Relations, CSA et. al. to coordinate responses. • Joined County Counsel tobacco settlement team to coordinate County participation outside County Counsel.
Assist the CAO and DCAO with various Health Care issues	• Developing Health Care Services District strategy and related governance options.
Assist with miscellaneous DOME matters	• Worked on development of IRG Incentives • Assisted with various contract administration and planning tasks. • Negotiated contract termination terms with IRG (verbal agreement reached 3/27/00).
RESEARCH AND REPORTING	
Support the mission of the Research and Reporting and encourage efforts to market their services throughout the County.	
Participate in the employee	• Developed and presented to C.A.O. & Management Team an outline and

satisfaction survey preparation and analysis.	methodology for the annualized Employee Satisfaction Survey. • Developed initial drafts of department specific instructions and forwarded them to each county department for further development and feedback. • Developed supplemental questionnaire in addition to basic satisfaction & rating of management questions. New questionnaire addresses issues such as incentive pay, performance plans, strategic planning, use of survey results and customer service. • Began working with individual departments in planning department specific survey administration. • Coordinated with MIHS management to include them in future employee satisfaction surveys and the exit interview process. • Conducted E.S.S. with employees in 15 departments, developed reports and began presenting findings to Management Teams and groups of employees. • Worked with 15 additional departments, including MIHS for administration of E.S.S. in the 3rd quarter. • Conducted E.S.S. with employees in 16 more departments including MIHS. • Worked with remaining departments for administration of survey in 4th quarther. • Developed preliminary or interim county wide report based on data collected through February. • Worked with OP&T in the development of a "Management Guide" to help departments use the data to improve production and increase retention.
Assist with the development and implementation of the Countywide customer satisfaction survey and individual departmental surveys.	• Worked with Performance Measures Steering Committee to give and receive directions toward customer satisfaction measures as performance measures. • Met with Chairman Brook and his staff to incorporate the Board of Supervisors into the Customer Satisfaction process. Currently working to develop Board specific reports of previous surveys. • Continued working with a number of departments to incorporate their data needs into county -wide survey of residents. • Continued working with specific departments interested in conducting internal customer satisfaction surveys. • Worked with MIHS management in addressing not only their client based data needs but their general population marketing and public relations efforts. • Developed methodology and began collecting encounter based satisfaction data. Data to be used in conjunction with data collected in the fall as baseline information for an on-going assessment of satisfaction that will be implemented in the 4th quarter. • Developed methodology and 2nd draft of a customer satisfaction survey to be administered to Department Directors relating to services provided by all internal service departments. • Developed methodology and 2nd draft of a customer satisfaction survey to be administered to a random sample of county residents. Continued working with departments to assure meeting their data needs as much as possible.
Participate on the Performance Measurement steering committee giving providing information on satisfaction outcome measures.	• Attended each scheduled meeting. • Made presentation on satisfaction measures that have been collected in the past. • Worked with staff to develop progress report presented to the CAO. • Continued involvement in committee meetings and assignments especially related to the need for customer satisfaction data in the Resource Accountability Project. • Met with ISIS representatives (Internal Service Departments) to finalize methodology and questionnaire for collection of this satisfaction data from department directors.
Continue other customer driven surveys, as contracted.	• Presented results of first quarter exit interviews in a full year format. • Developed and presented methodology for quarterly reporting of the previous 12 months of exiting employees. Modified questionnaire content to better meet the needs of both county and department management. • Developed and presented results of 2nd quarter exit interviews. • Compiled and presented Third Quarter Customer Satisfaction Results for Organizational Planning and Training to evaluate county wide training efforts. • Completed third quarter 1999-2000 data collection of JTPA 90 day follow-up survey,

	reported on first quarter FY 99-00 data collection efforts. • Data Collection completed and second quarter report presented to Health Services related to satisfaction with services provided by the Admitting Personnel at M.M.C. and the C.H.C. • Started work of the developing follow-up interviews with previous respondents in a survey for A.D.E.S. evaluating the effects of welfare reform on the client population. • Began developing methodology and questionnaires for an on-going encounter based satisfaction survey for Maricopa Integrated Health Service. • Continued working with MIHS management in efforts to reestablish data collection efforts related to clients disenrolling from county health plans. Received AHCCCS approval for this data collection effort. • Began data collection of sample of DES successful and unsuccessful applicants for Cash Assistance. Again the purpose of this study is to evaluate the effects of welfare reform on those families in need of services. • Began preparations for conducting the DES Child Care Rate survey for the sixth time since 1989. Data collection began in March.
Ensure that the business revenues exceed the expenditures.	• Reviewed and revised cost calculations for non-county funded projects to assure they cover a larger percentage of R & R overhead expenses. • Developed procedures to bill for services in a more timely manner to address cash flow issues.
DEPUTY COUNTY ADMINISTRATOR	
Provide general management support and direction to the managers and directors that report to the Deputy County Administrator (DCA) constellation.	
Lead a strategic planning process for the DCA and track the progress of goal achievement.	• Held the first 2 phases of a three-phase strategic planning session with the Office of Management and Budget. • Plan how to move forward with a strategic planning session for all DCA departments.
Ensure Year 2000 compliance and other technological issues are successfully implemented.	• Met the 100% compliance goal, as required.
Ensure that all employees within the DCA receive performance plans and evaluations.	• Developed and distributed performance evaluations for the staff of the Office of Management.
Encourage emotional commitment of employees through communication, staff involvement, training, and promotional opportunities.	• Many DCA managers are members of the Social Responsibility Committee. • Held the third of four Countywide blood drives during July 1999. • Held the fourth Countywide blood drive during October/November 1999. • Held the first of four Countywide blood drives during February/March 2000. • Participate in the United Way campaign. • Held the annual OMB budget completion celebration. This included presenting the OMB employee of the year • Continue the production and distribution of the DCA Quarterly Newsletter.
Automated solutions are sought for all DCA departments. Utilization of the internet for communication with departments and citizens continues and improves.	• Ensured the Office of Management and Budget homepage on the internet, as well as, the Office of Management and Budget information on the County's intranet are continually being updated with current information for the both the public at large and internal County employees to access.
Ensure that departmental budget goals are met.	• All DCA departments are meeting budget goals, year-to-date.