



KEN BURKE
CLERK OF THE CIRCUIT COURT
PINELLAS COUNTY, FLORIDA

CLERK OF THE CIRCUIT COURT

STRATEGIC PLAN

ISSUED
FEBRUARY 18, 2008

TABLE OF CONTENTS

Clerk's Message	2
Clerk's Mission and Values	3
Strategic Planning Process	4
Organizational Chart	5
Accomplishments	6
Strategic Pillars	10
Looking Ahead – Departmental Goals	14

CLERK'S MESSAGE



Ken Burke

Clerk of the Circuit Court, Pinellas County, Florida

This Strategic Plan for the Clerk's Office represents a group effort of all staff members of our organization. The mission and goals identified in this plan cannot be accomplished solely by management. It will involve the commitment of all staff working in the Clerk's Office. We are a team working together to serve the public.

We believe public service is an honor. We are committed to providing top-notch service to the citizens we serve. This commitment goes all the way from the citizens we directly serve at the counter in our offices to our watchdog role in ensuring that tax dollars are spent properly and wisely. This Strategic Plan helps ensure that Pinellas County citizens have a Clerk's Office that is truly the best that it can be.

The process for developing a collaborative strategic plan is not an easy one. This plan has involved a lot of effort by many people within the Clerk's Office. I thank each and every one of you for your efforts, and I hope you find sincere satisfaction for the contributions that you have made toward the future strategic direction of the Clerk's Office.

Ken Burke, CPA
Clerk of the Circuit Court

CLERK'S MISSION AND VALUES

The core mission of the Clerk's Office is to provide customer satisfaction. This mission is accomplished more succinctly by carrying out the motto of the Office –

- Customer Service Excellence
- Commitment to the Work
- Compassion for One Another

OUR VALUES:

We will serve the public with respect and courtesy – willingly, promptly, and competently. We will be sensitive to the needs of individuals while recognizing our responsibility to the community as a whole.

We believe, as employees and citizens of the community, that we share the responsibility to contribute toward the community's vitality.

We believe it is our responsibility to improve the overall quality of life through the sound management preservation of the environmental resources entrusted to us.

We will treat every employee with dignity recognizing the value of each individual's work. All shall be provided equal opportunity, a safe workplace, and the opportunity for professional and personal growth.

These, our values, will guide the development and implementation of Pinellas County policy for a better community.

STRATEGIC PLANNING PROCESS

The Clerk and staff are committed to providing customer satisfaction. We strive to serve the community with respect and courtesy. We are continuously striving to improve services throughout the community.

In 2007, the Clerk of the Circuit Court and management staff (Clerk's Team) met with Collaborative Labs, an innovation environment, to discuss the inception of a long-range plan to guide them in their efforts to serve the citizens of Pinellas County. This long-range plan will provide the framework for the Clerk's Office in making sound management decisions in the face of changing customer needs, technological advances and new legislation while at the same time maintaining the Clerk's strong tradition of professionalism and excellence.

To begin the strategic planning process, the Executive Leadership Team conducted sessions, in the form of brainstorming, to determine the foundation for the strategic direction of the Clerk's Office. The Executive Leadership Team arrived at five concepts, which are referred to as pillars, on which the goals and objectives of the Clerk's Office should be built. These strategic pillars are:

1. Customer Satisfaction
2. Employee Development
3. Coordination of Entities
4. Change Management
5. Proactive Excellence

Subsequently, the Clerk's Office held an In-Service Day to share the experience with Collaborative Labs and to discuss the future of the Clerk's Office. The day would serve as a sounding board for future initiatives. The first part of the session served as group brainstorming. We began by considering Customer Satisfaction and Change Management priorities, and employees were asked various questions. Employees openly discussed their ideas. The group then voted on those proposals to voice their opinion as to the top priorities for the Clerk's Office, as a whole.

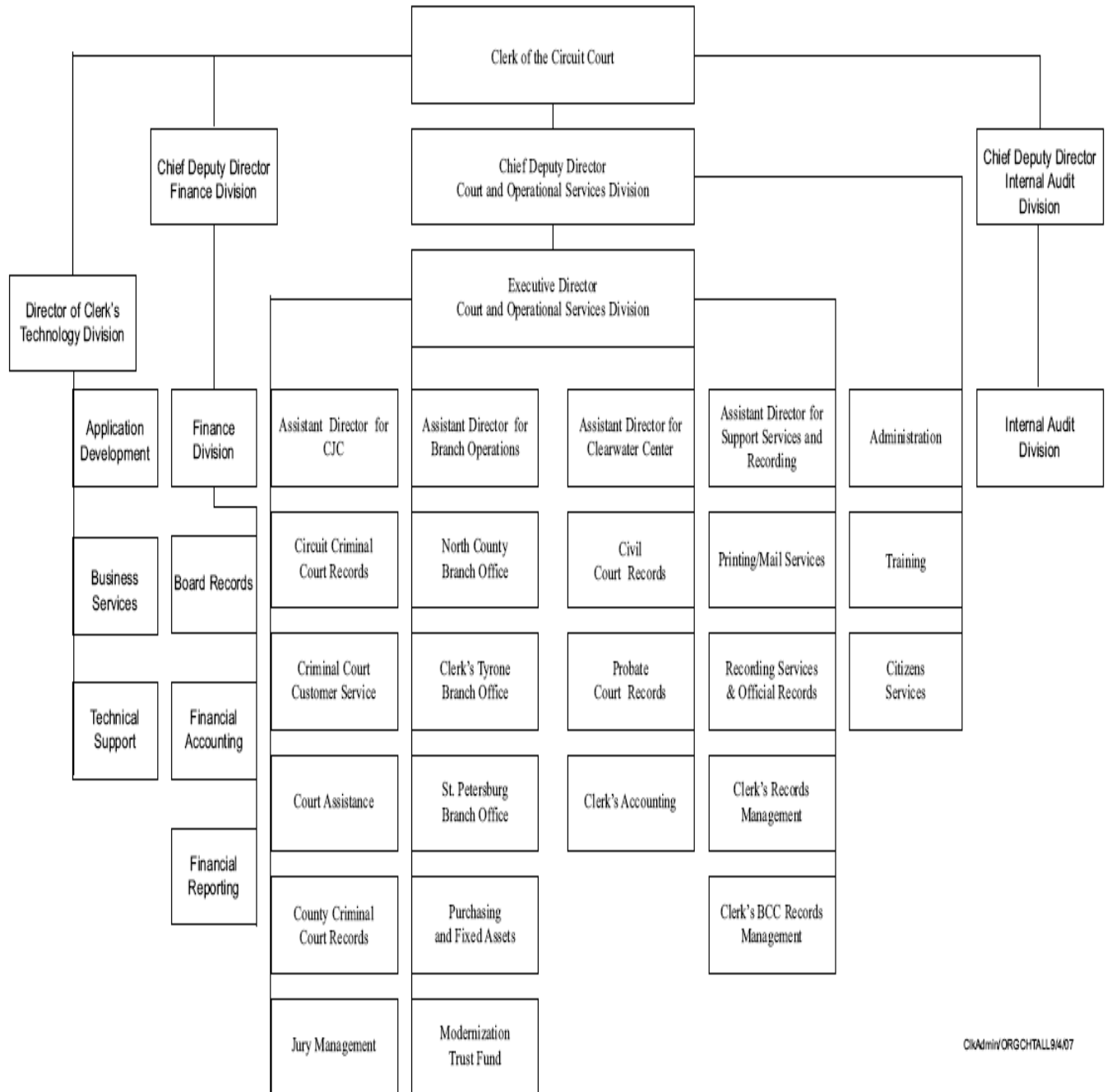
During the afternoon, each department or other functional unit separately met. Each department was responsible for defining their future goals and initiatives. The process involved identifying team members, resources needed and a timeframe to implement for each goal. This allowed each employee to share in the development of the future direction of their department.

Soon after, department teams met to discuss the goals, make changes, and set specific dates for implementation. Each departmental goal plays an integral part of the Clerk's Office overall strategic plan. The Clerk's Office organizational chart follows.

ORGANIZATIONAL CHART

KEN BURKE, CPA

OFFICE OF CLERK OF THE CIRCUIT COURT - PINELLAS COUNTY



ClkAdmiv/ORGCHTALL9/4/07

ACCOMPLISHMENTS

Since January 2005, under the direction of Clerk Ken Burke, the Clerk's Office has had many accomplishments throughout the organization. These accomplishments have already been done and, as applicable, are already integral components of the ongoing operations of the Clerk's Office.

The specific accomplishments as of February 2007 are identified below.

➤ COURT & OPERATIONAL SERVICES DIVISION

❖ TECHNOLOGY

- Redaction of statutory required information through contract with vendor
- Attorney E-mail accounts established
- Access to images for attorneys of record in Probate
- Probate Imaging Workflow streamlining
- Implementation of paperless courts in two traffic divisions
- Traffic Imaging System implementation
- Transfer of citation data from Sheriff's Office in car ticket writer (process efficiency)
- Automation of Tax Deed process through Tribute software

❖ CUSTOMER SATISFACTION

- Implementation of a Comment Card System
- Reduction of lines at counters
- Establish Express Window in St. Petersburg Branch
- Install a television in Tyrone Branch Office lobby for customers
- Creation of Citizen's Services Coordinator position
- Enhancement of our Clerk's website and online services
- Official Records images made available to the public online
- 100 free transactions per day made available online for the public to search records on-line
- New Jury videos produced for jurors
- Cyber cafe established for jurors
- Publication of Annual Report for the Clerk's Office
- Payment Kiosks established at outlying locations
- Mass wedding ceremony conducted on Valentine's Day

ACCOMPLISHMENTS

❖ MANAGEMENT

- Exempt Salary Schedule established and published
- Court Budget success from deficit to Surplus County
- Met all performance measures
- New Exempt Performance Appraisal Process established
- Establishment of Professional Class B supervisors classification
- Semi-annual meetings with supervisors established
- Expedited filling of vacancies in Exempt level positions
- Re-organization of Clerk's IT function completed
- Distribution of Clerk's Policy Handbook
- Managers have been empowered with appropriate decision-making authority
- Collection Agency contract established to enhance collections

❖ TRAINING

- Clerk's In-Service Day established
- Office-wide Customer Service Training conducted
- Enhancement of Training opportunities for supervisors and managers
- On-Site Certified Public Manager (CPM) course offered
- Unauthorized Practice of Law Seminar was presented by the Florida Bar to Court personnel
- Domestic Violence Sensitivity Training was provided to applicable personnel by Spouse Abuse Shelters

❖ OUTREACH

- FACC Committee appointment of Clerk Burke
- Collaboration with Courts, State Attorney, Public Defender, Hearing Officers, Adjunct Agencies, Board of County Commissioners, County Administrator and Attorneys has been improved
- Florida Supreme Court Appointment of Clerk Burke to Judicial Management Council and Pro Se Task Force
- Attorney Luncheons with the Clerk have been established
- Periodic Clerk and Judge luncheons are being done

ACCOMPLISHMENTS

❖ EMPLOYEE INITIATIVES

- Clerk's Annual Picnic has been established
- Burke's Bucks Program has been initiated
- Bring Your Child to Work Program enhancements were made
- Employee Appreciation Week has been emphasized
- Clerk's Office newsletter has been enhanced
- Vacation approvals have been delegated to the department level
- Participation and recognition of employees in United Way's Day of Caring has been expanded
- Approval of flex time where appropriate
- Lateral transfer policy was enhanced
- Dress code modifications were made
- Training request approval process was streamlined
- E-mail, Internet and Intranet access has been provided to all staff

➤ FINANCE DIVISION

- Awarded the Certificate of Achievement for Excellence in Financial Reporting by the Government Finance Officers Association (GFOA) for Comprehensive Annual Financial Report (CAFR) the 26th consecutive year
- Develop the first Popular Annual Financial Report (PAFR) for the citizens
- Awarded the Popular Annual Financial Reporting Award by the GFOA on the first submission of the PAFR
- Successfully completed the year end closing, annual audit and CAFR preparation process after transitioning to new external auditors for the first time in 15 years including submission of most audit schedules in electronic format
- Began participation in the Oracle Project Unified Solution (OPUS) team as members of the Executive Committee, Project Sponsors Committee, Stakeholders Committee and Business Team Leads for the implementation of the Oracle Financial and Human Resources/Payroll Business Suites
- Developed and implemented a new electronic document management system as a repository for all Board of County Commission ordinances, resolutions, contracts and official actions, accessible on the intranet by all County departments
- Enhanced the electronic scheduling for Value Adjustment Board (VAB) process enabling Board Records to handle all scheduling for the VAB and streamline the workflow between Board Records and the Property Appraiser's Office
- Created a VAB log improving the documentation of transfers of funds between the branch offices, couriers and Board Records

ACCOMPLISHMENTS

- Began collaborating with Board departments in revising the Board of County Commissioners' Investment Policy to maximize yields and diversify the portfolio and developed enhanced cash forecasting methods
- Began the pilot phase of the project to pay vendors through ACH from the Accounts Payable Application
- Collaborated with Clerk Technology Department and IT Department on a vendor payment inquiry system via the Intranet for Board and Clerk payments to be implemented soon

➤ INTERNAL AUDIT DIVISION

- Issued 243 recommendations for improvements in County operations
- Converted to paperless audits
- Established the fraud, waste and abuse Hotline and the Public Integrity Unit
- Developed our role in guardianships to increase oversight of those who are unable to take care of themselves
- Received a "clean" opinion from an external quality assessment review

STRATEGIC PILLARS

In designing the strategic plan, the Clerk's Office has arrived at five pillars for success. The pillars represent the foundation on which the departmental goals will be based. Once all pillars are supported by goals, the Clerk's Office will be able to achieve the best that it can be for Pinellas County citizens. The strategic pillars are Customer Satisfaction, Skills and Capabilities, Managing Change, Coordination of Entities, and Proactive Excellence. A description of each of the pillars follows.

CUSTOMER SATISFACTION

Customer service is both the delivery of a product and a perception of what the customer wants out of the service being offered by the Clerk's Office. Obtaining meaningful information from the customer to structure and improve the product being delivered is an ever changing entity. The Clerk's Office has several on-going functions to obtain feedback from customers. These areas include an exit survey, and comment cards. Exit surveys relate to on-line services offered to customers. After the service is completed, a short survey is delivered to the customer about the service just used. Comment cards are being used throughout the Clerk's offices currently.

Excellent customer service is an overall concept that is composed of various dimensions. Those dimensions are:

- Customer Relations: The elements of how the Clerk's Office looks to its internal and external customers.
- Service and Support (customer service): Considerations of how effective customer service is measured.
- Value of Tax Dollars Spent: The value being received for the tax dollars spent, including continual reviews of efficiency.
- Speed and Efficiency: Continual consideration as to whether services are being performed in the most efficient possible manner.
- Security and Privacy: An inherent part of Customer Service is to ensure the security and privacy of personal information where allowed by law.
- Reliability: The Clerk's Office must deliver reliable information on a reliable basis. Excellent Customer Service must be consistently delivered.
- Availability: Services must be available to all members of the public.
- Quality of Product/Service: High quality services must be consistently provided in an efficient manner.

STRATEGIC PILLARS

The heart of the mission of the Clerk's Office relates to customer service. Therefore, the Customer Satisfaction pillar is one of the most important pillars of the Strategic Plan.

EMPLOYEE DEVELOPMENT

The Clerk considers the development of employees to be crucial in the provisions of excellent customer service and fulfillment of responsibilities to the citizens of Pinellas County. This involves fostering an environment that promotes the development of successful employees through initiatives that address recruitment, training, development, and retention.

Part of being successful in providing high quality customer service involves ensuring that the workforce is engaged and satisfied with their environment. It involves matching an individual's skills and knowledge with the job he or she performs, and providing opportunities to grow within that position or expand to another.

The development of employees is considered to be a responsibility of every supervisor. It is not enough just to make sure employees do their jobs right. To have a progressive organization, supervisors must, through a combination of training, job responsibilities, and motivation, provide an environment that nurtures employee growth. By taking this approach with employees, the Clerk's Office, as an organization, can continue to reach new heights.

COORDINATION OF ENTITIES

Definition: Organizing the efficient and effective interaction with all internal and external customers.

Objectives:

1. All potential stakeholders, their relevant issues and initiatives should be identified and considered in departmental planning. Meeting the needs of our varied customers is an integral part of the overall success of the Clerk's office. Finding new ways to be more efficient and effective by being more proactive and serving those customers is very important.
2. Opportunities for improving communications with current and potential stakeholders should be identified. All Clerk departments interact daily with at least several County departments, governmental agencies and/or law enforcement, as well as the general public. When discussion is underway to revise current policies and/or procedures or consider new technology, the effort should be made to include all stakeholders in the planning stage to get their feedback, cooperation and acceptance.
3. Opportunities to eliminate redundancy and procedural inconsistencies in process development and evaluation should be identified. The more often stakeholders can be included in the formulation of new endeavors or the changing of existing processes, redundancy and procedural inconsistencies can be substantially reduced resulting in more efficiency and less stress.

STRATEGIC PILLARS

4. More efficient use of technological, human and physical resources should be identified. Advances in technology continue and so must the skills of the employees who will use it. Evaluation of current staff skills should be undertaken and additional training scheduled where necessary and/or a reassignment of duties. Utilization of available technology should allow a streamlining of departmental functions and more effective use of existing staff.

CHANGE MANAGEMENT

Change management involves effective planning for change by getting people involved in changes and leading by example. An effective change management process involves several principles:

- a.) Involve all levels in developing change. This includes managers and assistant managers identifying opportunities to do something different from what we already do.
- b.) Employee involvement and feedback should be sought on a routine and on-going basis.
- c.) Succession planning should be an integral part of the Clerk's Office processes.
- d.) A focus should always be on productivity. This includes meaningful performance measures that show real world improvements in operations and customer service.
- e.) Existing practices should be questioned. A coordinated approach for areas, departments or sections should be established to review the areas for practices that should be stopped or changed.
- f.) Micro management should be identified and stopped.

PROACTIVE EXCELLENCE

Proactive excellence involves developing an organizational culture that fosters an ongoing commitment of employees to help the organization be the best that it can be. For the Clerk's Office, proactive excellence involves effective use of the other four pillars: customer satisfaction, employee development, coordination of entities, and change management. Through concentration on these pillars organizational excellence can be achieved on a proactive basis.

Essential components of a strategic plan are specific goals for the office to complete to more fully achieve the mission of the office, based on the pillars of success. For the goals to be congruent with the desired strategic direction of the Clerk's Office, each goal needs to relate to one or more of the pillars of success. Thus, the pillars as to which each goal relates are identified.

A team approach has been chosen by the Clerk's Office as the best means to accomplish each goal. With the assignment of a team, a team leader must be identified. This team leader, referred to as a champion, is responsible for ensuring the goal is accomplished through the efforts of the team.

STRATEGIC PILLARS

Achievement of goals frequently requires resources other than the team member. It is important that the expected resources needed to achieve the goals are identified in the beginning of the process.

Without time frames to work on achieving the goal and to complete the goal, likelihood of achieving the goal on a timely basis is increased. Therefore, a time line for each goal has been included.

Since the Clerk's Office operates in a dynamic environment, changes in operations, activities and goals are expected to occur. As such, the goals contained herein will be reviewed and modified on an annual basis, at a minimum. Goals, team members, resources, and time lines are subject to change as the needs and strategic direction of the office warrant.

LOOKING AHEAD – DEPARTMENTAL GOALS

Probate

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. E-Filing				
1a. Create requirements & guidelines; research security requirements; research cost requirements	Customer Satisfaction	Management–C IT–C Staff Members/ Probate; Clerks, IT–C General Magistrate–C Bar Representative–C	Equipment Software Trainers Vendor \$\$\$	Start 3 rd Qtr 2007 Finish 1 st Qtr 2008
2. Telecommuting				
2a. Evaluate job duties that can be performed at home	Managing Change	Management – C IT – C Staff Members (Probate) – TM General Magistrate–T	Equipment Software Training \$\$\$ Security	Start 4 th Qtr 2007 thru 2 nd Qtr 2008
2b. Determine quantitative/qualitative standards for performance	Managing Change	Management-C IT-C Staff Members (Probate)-TM General Magistrate-T	Equipment Software Training \$\$\$ Security	Start 4 th Qtr 2007 thru 2 nd Qtr 2008
2c. Determine who would be interested in working from home	Managing Change			
2d. Determine requirements for "Home Office" set up				
3. Succession				
3a. Survey employees for their interest	Skills & capabilities	Management – C Trainer – TM Supervisor – TM Employees – TM	Survey form Evaluator Training options available	Now thru 3rd Qtr 2007 4 th Qtr 2007 1 st Qtr 2008 thru 3 rd Qtr 2008
3b. Develop training program (including cross training)	Skills & capabilities	Management-C Trainer-TM Supervisor-TM Employees-TM	Survey form Evaluator Training options available	Now thru 3rd Qtr 2007 4 th Qtr 2007 1 st Qtr 2008 thru 3 rd Qtr 2008

LOOKING AHEAD – DEPARTMENTAL GOALS

Probate Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
3c. Develop a mentoring program for the Clerk's Office	Skills & capabilities	Management Staff Members Personnel Dept		
3d. Active recruitment for entry level positions				

LOOKING AHEAD – DEPARTMENTAL GOALS

Printing/Mail Services/Courier

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Management Education/ Courier Services Mail Services	Coordination of Entities Customer Satisfaction	Couriers and Mail Clerks - C Management Team/ Supervisors - T	Time Coordinator	Start 1 st Qtr 2008 Finish 3 rd Qtr 2008
Customer Education/Mail Services	Customer Satisfaction Coordination of Entities	Customer - C Mail Services - T	Time Equipment Technology Education	Start 2 nd Qtr 2007 Finish 4 th Qtr 2007
Internal Mail/Proper Addressing	Customer Satisfaction Managing Change	Customer - C Mail/Courier Services - T	Time, Education, Department Code Creation (Team Developed), P.I.M., Signs/Article (PCM), Department Listing Sheet, Procedures, Reminders/E-mails	Start 3 rd Qtr 2007 Ongoing to Finish
Mail Services Website Electronic Stamp Request	Customer Satisfaction	Printing/Mail Services - C IT, Customers - T	IT Programming Software Time	Start 3 rd Qtr 2007 Ongoing to Finish
Print Shop Completed Job Location/Deliveries	Coordination of Entities	Customer/Courier Services - C Print Services - T	Time Management Coordination Label Revision Notices	Start 3 rd Qtr 2007

LOOKING AHEAD – DEPARTMENTAL GOALS

Printing/Mail Services/Courier Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2. Addition of 4-color printing press				
2a. Equipment installation/training	Customer satisfaction Skills and capabilities Proactive excellence	Clerk's Printing Service – C PressTek (Vendor), IT, Communications, All County Departments - T	Software/hardware Facilitator Mgmt. Vendor support Staff inter-agency cooperation Lease management	Completed 1 st Qtr 2007 to 2 nd Qtr 2007 3 rd Qtr 2007 and ongoing
2b. Customer/marketing/utilization	Customer satisfaction Skills and capabilities Proactive excellence	Clerk's Printing Service – C PressTek (Vendor), IT, Communications, All County Departments - T	Software/hardware Facilitator Mgmt. Vendor support Staff inter-agency cooperation Lease management	3 rd Qtr 2007 and ongoing

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Circuit Criminal

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Enhanced service to internal and external customers				
1a. Establish teams to streamline processes	Skills and capabilities Managing change Proactive excellence Coordinate entities Customer satisfaction	Dept. Managers-C Supervisors - T	Employees Training	Start 3 rd or 4 th Qtr 2009
1b. Develop flowchart of work processes	Skills and capabilities Managing change Proactive excellence Coordinate entities Customer satisfaction	Dept. Managers – C Supervisors – T	Employees Training	Start 3 rd or 4 th Qtr 2009
1c. Ensure all required elements are captured; Identify output/input requirements and interfaces	Skills and capabilities Managing change Proactive excellence Coordinate entities Customer satisfaction	Dept. Managers – C Supervisors, Employees, Clerk's IT, Court Rep., County IT, Records Mgmt. – T	Vendor	Start 3 rd or 4 th Qtr 2009

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Circuit Criminal Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1d. Testing and implementation of new system	Skills and capabilities Managing change Proactive excellence Coordinate entities Customer satisfaction	Dept. Managers – C Supervisors, Employees, Clerk's IT, Court Rep., County IT, Records Mgmt. – T	Employees Training Vendor	Start 3 rd or 4 th Qtr 2009
1e. Purchase equipment; Establish procedures for implementation and training of staff	Skills and capabilities Managing change Proactive excellence Coordinate entities Customer satisfaction	Dept. Managers – C Supervisors, Employees, Clerk's IT, Court Rep., County IT, Records Mgmt. – T	Employees Training Vendor	Start 3 rd or 4 th Qtr 2009
2. Provide for leadership transition and the right person for each position to ensure future success of office				
2a. Identify interested candidates	Skills and capabilities Managing change Proactive excellence Coordinate entities	Co. Personnel Dept., Human Rights, Clerk, Directors, Managers, Supervisors, and other Co. Agencies	Leadership Team Employees Mentor program Training	Ongoing process

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Circuit Criminal Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2b. Identify positions for turnover in the next 5 years	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2c. Decide positions needed in the future	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2d. Identify skills and performance development needed to prepare candidates	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2e. Create and maintain candidate profiles	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2f. Arrange for employee development classes, mentoring programs, training, and internal/external classes to develop skills and capabilities	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2g. Identify best candidate to fill position	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2h. Enhance identification process & improve Mgmt. practice to identify candidates	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2i. Identify new candidates for succession	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above
2j. Revise candidate pools	Same as 2a. above	Same as 2a. above	Same as 2a. above	Same as 2a. above

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – County Criminal

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Implement Imaging				
1a. Develop workflow needs assessment	Customer Satisfaction	Connie – C C. Short – IT CJC Managers & Asst Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management - T	\$\$\$ Equipment Software Time Vendor	01/01/2008
Training; Identify documents to be imaged; money	Coordination of entities	Manager; trainer	Training Space Employees	12/31/2010
Accessibility of documents to be scanned; category for documents to be imaged	Skills and capabilities; proactive excellence			
Identifiers; determine how far back to go	Managing change			
Is it going to be on-line, and who will have access: Sanitized cases; User friendly				

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – County Criminal Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1b. Testing & training	Customer Satisfaction	Connie – C C. Short – IT CJC Managers & Asst Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management - T	\$\$\$ Equipment Software Time Vendor	01/01/2008
2. Succession Management				
2a. Identify Interested Employees	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and ongoing thru 4 th Qtr 2008
Cross-training; develop mentorship program; supervisor recommendations; team work, knowledge, experience, employees' goals	Managing change	People doing the job	Hardware and software focus	Ongoing
Developing interpersonal skills; training; have more than one in-service day; updated manuals and guidelines; empowerment	Proactive excellence			
Employee development classes; software classes; supervisors willing to teach	Customer Satisfaction			

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – County Criminal Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2b. Identify Positions	Skills and capabilities	Clerk Admin–C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and ongoing thru 4 th Qtr 2008
2c. Stop loss (freeze all retirements)	Skills and capabilities	Clerk Admin–C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and ongoing thru 4 th Qtr 2008
3. New Cashier System (all court related areas)				
3a. Identify current & future needs	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C ??? Accounts IT Clerk's IT Other agencies (???)		
Uniform codes; uniformity of systems; identify agencies affected; cost benefit analysis; cross training				

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – County Criminal Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
3b. Decide to buy or build	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C ??? Accounts IT Clerk's IT Other agencies (???)		
Is it supported internally; interface with current system; consider all variables, compare vendors and software needs; location	Managing change; Skills and capabilities	Law enforcement; jail, doc, JDC	Employees Hardware Clerk's IT County IT	
3c. Program – Identify equipment needs				Start 3 rd Qtr 2007 thru 4 th Qtr 2008
3d. Implement				April 2010

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Jury

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Receive data electronically from State and County Agency Set parameters to comply w/ Statutes – sort, search, verify	Proactive Excellence	Jury Asst Mgr - C IT Staff External Agencies Criminal Records	Low Cost & Same – No Vendor or Equipment	January 2008
1b. Testing & training	Proactive Excellence	Jury Asst Mgr - C IT Staff External Agencies Criminal Records	Low Cost & Same – No Vendor or Equipment	January 2008
2. Succession Management				
2a. Identify interested employees	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and ongoing thru 4 th Qtr 2008
2b. Identify Positions	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and ongoing thru 4 th Qtr 2008
Jury Manager	Desire Communication Demeanor Knowledge Leadership Skills	Manager Assistant Manager	Training Time	Ongoing

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Jury Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2c. Stop loss (freeze all retirements)	Desire Communication Demeanor Knowledge Leadership Skills	Manager Assistant Manager	Training Time	Ongoing
3. New Cashier System (all court related areas)				
3a. Identify current and future needs	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C ??? Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	Start now
Same day pay for Jurors Identify best method for positive results Develop procedures to comply w/ Audit Recs. & Cash Control procedures	Customer satisfaction Proactive excellence Coordinate entities			
3b. Decide to buy or build	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C ??? Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	Start now

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Jury Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Buy Equipment and Software	Customer satisfaction Proactive excellence Coordinate entities	Jacque / Jury Staff Acct FRS's IT Clerks IT		
3c. Program				Start 3 rd Qtr thru 4 th Qtr 2008
3d. Implement				

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Court Assistance

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Implement Imaging				
1a. Develop workflow needs assessment	Customer Satisfaction	Connie – C C. Short – IT CJC Managers & Asst. Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management	\$\$\$ Equipment Software Time Vendor	01/01/2008
Stop: Stop writing on back of complaints; Doc Transmittal forms; SA PO's in court; Trip ticks; weekend paid copies; copies for judges; moving from sups; picking up other agency slack; hand writing notice or man; complete verdict form				
Start: Four day work week; compliment in meetings; more evidence meetings; compensation for training; email regarding registering; 7:30-4:30 shift; assign clerks to branch; drop juvenile after 4:00 pm.				

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Court Assistance Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1b. Testing & training	Customer Satisfaction	Connie – C C. Short – IT CJC Managers & Asst. Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management	\$\$\$ Equipment Software Time Vendor	01/01/2008
2. Succession Management				
2a. Identify Interested employees	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and Ongoing thru 4 th Qtr 2008
Meet with employees	Tact – be nice; communication		Notify registers	
	Multi task; visionary			
	Problem solver; positive attitude			
2b. Identify Positions	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and Ongoing thru 4 th Qtr 2008

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Court Assistance Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
All positions for promotion to Supervisor, Assistant Manager, etc.	Want to help people with job knowledge Open-minded	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and Ongoing thru 4 th Qtr 2008
2c. Stop loss (freeze all retirements) n/a	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and Ongoing thru 4 th Qtr 2008
3. New Cashier System (all court related areas)				
3a. Identify current & future needs	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ training consultant	Start now
3b. Decide to buy or build	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ training consultant	Start now
3c. Program				Start 3 rd Qtr thru 4 th Qtr 2008
3d. Implement				

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Customer Services

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Implement Imaging				
1a. Develop workflow needs assessment	Customer Satisfaction	Connie – C C. Short – IT CJC Managers & Asst. Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management	\$\$\$ Equipment Software Time Vendor	01/01/2008
Pleadings, letters, transcripts, microfilm, traffic/misdemeanor	Customer Satisfaction	Linda Lee – C C. Short – IT CJC Managers & Asst. Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management	\$\$\$ Equipment Software Time Vendor	01/01/2008 and ongoing No later than 2010
1b. Testing and training	Customer Satisfaction	Linda Lee – C C. Short – IT CJC Managers & Asst. Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management	\$\$\$ Equipment Software Time Vendor	01/01/2008 and ongoing No later than 2010

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Customer Services Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Vendor training for employees	Customer Satisfaction	Linda Lee – C C. Short – IT CJC Managers & Asst. Managers; PD; SA; CT Adm.; Judges; PCSO; CMIT; CJC Employees; Records Management	Vendors	01/01/2008 and ongoing No later than 2010
2. Succession Management				
2a. Identify Interested employees	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and Ongoing thru 4 th Qtr 2008
Promotions, termination, retirement	Training, on the job training, mentoring, job knowledge		Time Training CPM \$\$\$	Now and ongoing
2b. Identify Positions	Skills and capabilities	Clerk Admin – C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and Ongoing thru 4 th Qtr 2008

LOOKING AHEAD – DEPARTMENTAL GOALS

Criminal Justice Center – Customer Services Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
FRS Trainers, Seniors, Supervisors, Management	Training, on the job training, mentoring, job knowledge	Clerk's training	Time, training, money, tuition reimbursement, CPM, money, time, training	Ongoing
2c. Stop loss (freeze all retirements)	Skills and capabilities	Clerk Admin–C Managers Assistant Managers Supervisors	Time Training CPM \$\$\$	Now and Ongoing thru 4 th Qtr 2008
Encourage cross training	Training, on the job training, mentoring, job knowledge		Time, training, money	Ongoing
Better pay (upgrade pay grade)	Proactive excellence; coordinate entities		Time, training, money	Ongoing
3. New Cashier System (all court related areas)				
3a. Identify current and future needs	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	Start now

LOOKING AHEAD – DEPARTMENTAL GOALS

Civil Court Records

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
New cash terminals (computers, scanners, validators, printers); procedural manual, laser printers, copiers	Customer satisfaction, Proactive excellence, coordinate entities (Tax Collector between departments)	Liz – C Bill, Catherine, Stephen, Patrick, Dept. Trainer (T), IT, Acct; victim witness (SAO), Other agencies	Time, training, money	Start now and ongoing
Laser fingerprinting, kiosk machines, interface with victim/witness, combine old system into new system (smooth transition) Identify FRS workspace			Time, training, money	Start now and ongoing
3b. Decide to buy or build	Customer satisfaction Proactive excellence Coordinate entities	Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	Start now
Buy new equipment, software, custom-made workstations, and kiosk. Build procedural manual		Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	Now and ongoing

LOOKING AHEAD – DEPARTMENTAL GOALS

Civil Court Records Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
3c. Program		Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	Start 3 rd Qtr 2007 thru 4 th Qtr 2008
3d. Implement		Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	4 th Qtr 2008
4. Testing/Implementation of new system (debug)				
Involve all employees from team in testing process (setup of test environment)	ALL	Chris Mgr – C Accts IT Clerk's IT Other agencies (???)	Software Equipment \$\$\$ Training Consultant	4 th Qtr 2007 to 4 th Qtr 2008
Designated training time for staff				

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's Accounting

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Telecommuting				
1a. Performance tracking system	Managing Change Skills and capabilities	Management – C Supervisors – TM Staff – TM IT – TM	Login/usage capture Equipment Establish performance measures Budget funds	4 th Qtr 2007 to 1 st Qtr 2008 2 nd Qtr 2008 to 4 th Qtr 2008 1 st Qtr 2007 to 3 rd Qtr 2007
1b. Identify tools, technology, risk	Managing Change Skills and capabilities	Management – C Supervisors – TM Staff – TM IT – TM	Login/usage capture Equipment Establish performance measures Budget funds	4 th Qtr 2007 to 1 st Qtr 2008 2 nd Qtr 2008 to 4 th Qtr 2008 1 st Qtr 2007 to 3 rd Qtr 2007
2. Imaging				
2a. Examine workflow and documents to image	Proactive excellence Managing Change	Management – C IT – TM Supervisor/staff – TM Records Mgmt. Internal audit	Equipment Vendor's assistance Training Budget funds Time to plan Audit Review	4 th Qtr 2007 to 1 st Qtr 2008 2 nd Qtr 2008 to 4 th Qtr 2008 1 st Qtr 2007 to 3 rd Qtr 2007

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's Accounting Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2b. Decide on vendor, equipment, method	Proactive excellence Managing Change	Management – C IT – TM Supervisor/staff – TM Records Mgmt. Internal audit	Equipment Vendor's assistance Training Budget funds Time to plan Audit Review	4 th Qtr 2007 to 1 st Qtr 2008 2 nd Qtr 2008 to 4 th Qtr 2008 1 st Qtr 2007 to 3 rd Qtr 2007
2c. Evaluate other departments with imaging				
3a. Examine other agency's systems	Proactive excellence	Management – C Vendor – TM IT – TM Staff – C Trainer – TM	Equipment Software Training	1 st Qtr 2007 to 4 th Qtr 2008 4 th Qtr 2008 to 4 th Qtr 2008
3b. Coordinate with other systems that are already in use	Proactive excellence	Management – C Vendor – TM IT – TM Staff – C Trainer – TM	Equipment Software Training	

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's Administration: Training, Administration, Public Relations

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Meet training needs				
1a. Identify employees strengths and goals	Managing Change Skills and capabilities	Mgmt. – TM Clerk/Director–C	People/Staff \$\$\$	Implement 1 st Qtr 2007 and ongoing
1a. Survey employee's goals and career path				
1b. Develop training plan	Managing Change Skills and capabilities	Mgmt. – TM Clerk/Director–C	People/Staff \$\$\$	Implement 1 st Qtr 2007 and ongoing
2. Automation/data base; all ED external				
2a. Select database	Skills and capabilities	Clerk – C & TM Training–C & TM Mgmt. – TM	Vendor Staff \$\$\$	Select program – 2 nd Qtr 2007 Train to use– 3 rd Qtr 2007 Begin using 4 th Qtr 2007
2b. Monitor & update (education training)	Skills and capabilities	Clerk – C & TM Training–C & TM Mgmt. – TM	Vendor Staff \$\$\$	Select program – 2 nd Qtr 2007 Train to use– 3 rd Qtr 2007 Begin using 4 th Qtr 2007

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's Administration: Training, Administration, Public Relations Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
3. Enhance speakers bureau				
3a. Contact non-traditional organizations	Customer satisfaction Proactive excellence	CCSP and Training – C Clerk – C	\$\$\$ Staff?	1 st Qtr 2007
Media Up				
Little League groups (letter to be sent to the organization. Rec. Courts and Class Rooms				
All American Teach In				
3b. Media and web promotion of topics and speakers	Customer satisfaction Proactive excellence	CCSP and Training – C Clerk – C	\$\$\$ Staff?	1 st Qtr 2007
Develop goals and speakers bureau. Better use of Channel 18, and other media outlets				
Channel public access. Tutorials on Official Records, for example.				
Passports, Videos, Marriages				
Speaker's Bureau – What is their area of expertise?				
4a. Increase relations of admin. office with both internal and external customers	Customer satisfaction Proactive excellence	Clerk & Admin. Staff & Director	People	1 st Qtr 2007

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's Administration: Training, Administration, Public Relations Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Change Linebarger letter. Create General Information number.	Managing Change			
Telephone Directory Listing				

LOOKING AHEAD – DEPARTMENTAL GOALS**Clerk's Records Mgt; BCC Records Mgt**

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. BCC Records Imaging				
1a. Current Records Imaging	Coordinate entities	Board Records: Clerks BCC Rec Mgt; F/S; Co. Atty; Co. Administrator	Documentum software Access software Scanners Staff Service space	Current: Start 1 st Qtr 2007 and ongoing
1b. Historical records imaging	Coordinate entities	Board Records: Clerks BCC Rec Mgt; F/S; Co. Atty; Co. Administrator	Documentum software Access software Scanners Staff Service space	Historical: Start 3 rd Qtr 2007 and finish 4 th Qtr 2008
2. Civil Records Imaging				
2a. Current	Coordinate entities; Customer satisfaction	Clerks Rec. Mgt. (C) Civil Court Records(T) Clerks Tech(T) BCC IT (T) County Atty	Global 360 Scanners/workstations Programming (2 nd archive writer) Server Staff; Software; Money	2 nd Qtr 2007 3 rd Qtr 2007 to 4 th Qtr 2008
Trakman training	Customer satisfaction	Clerk's Rec Mgt (C)	Staff	2 nd Qtr 2007
Courtesy to customers	Customer satisfaction, excellence, quality	Clerk's Rec Mgt (C)	Faster Response; scheduling	2 nd Qtr 2007

LOOKING AHEAD – DEPARTMENTAL GOALS**Clerk's Records Mgt; BCC Records Mgt Continued**

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Acquire add'l stools for WHS	Customer satisfaction	Clerk's Rec Mgt (C)	Stools/Folding	2 nd Qtr 2007
Expedite process of microfilming/editing	Customer satisfaction; coordinate entities	Clerk's Rec Mgt (C)	Microfilm readers; workflow development, workspace	3 rd Qtr 2007
3b. Historical	Coordinate entities; Customer satisfaction	Clerks Rec. Mgt. (C) Civil Court Records(T) Clerks Tech(T) BCC IT (T) County Atty	Global 360 Scanners/workstations Programming (2 nd archive writer) Server Staff; Software; Money	2 nd Qtr 2007 3 rd Qtr 2007 to 4 th Qtr 2008
Bar code scanners at microfilm workstations to scan file labels as filmed	Customer satisfaction; excellence	Clerk's Rec Mgt (C); Clerk's Tech, BCC IT	Hand held scanners; Trakman software, programming	

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's BCC Records Management

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. eDiscovery/ e/Compliance				
1. Dept./agency public records series inventories	Coordinate entities	Co. Atty. – C Co. Adm., Clerk's BCC Rec. Mgmt., IT, IS, Co. Depts. – T	Analytical staff Laptops Information on functional records Excel or Access software	Start 1 st Qtr 2008 Finish 4 th Qtr 2010
1b. Inventories of electronic records and databases to determine retention	Coordinate entities	Co. Atty. – C Co. Adm., Clerk's BCC Rec. Mgmt., IT, IS, Co. Depts. – T	Analytical staff Laptops Information on databases Excel or Access software	Start 1 st Qtr 2008 Finish 4 th Qtr 2010
2. Service Level Agreements for Imaging	Coordinate entities	Clerk's BCC Rec. Mgmt.-C Co. Adm., Co. Atty., Co. Depts. – T	Analytical staff Laptops Information on departments Excel or Access software	Start 3 rd Qtr 2008 Finish 4 th Qtr 2009
3. Retention Manager for imaging system	Customer satisfaction	Clerk's BCC Rec. Mgmt.-C Co. Adm., Co. Atty., Co. Depts. – T	ApplicationXtender Retention Manager Imaging System Migration completed	Start 4 th Qtr 2007 Finish 3 rd Qtr 2009

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's BCC Records Management Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
4. Application integration (i.e., GIS, Maximo, Permits Plus)	Coordinate entities	IS – C Clerk's BCC Rec. Mgmt., IT, Co. Depts. – T	Analytical staff ApplicationXtender Retention Manager WebXtender	Start 4 th Qtr 2008 Ongoing
5. Enterprise Content Management for BCC Depts. And independent agencies	Coordinate entities Proactive excellence	Co. Commission Co. Admin. Clerk's BCC Rec. Mgmt. IT Co. Depts.	Analytical staff ApplicationXtender Retention Manager WebXtender	Start 1 st Qtr 2010 Ongoing
6. Expanded imaging conversion service to BCC Depts.	Coordinate entities	Clerk's BCC Rec. Mgmt.-C IT, Co. Depts. – T	Analytical staff ApplicationXtender WebXtender Server Space	Ongoing
7. Automated time tracking system for cost allocation program	Proactive excellence	Clerk's BCC Rec. Mgmt.-C IT, Co. Depts. – T	Clerk's BCC Rec. Mgmt., staff, bar code scanners, bar code labels	Start 4 th Qtr 2007 Finish 2 nd Qtr 2009
8. Nims training	Coordinate entities	EOC – C Clerk's BCC Rec. Mgmt.-T	Staff Disaster recovery supplies	Start 2 nd Qtr 2008 Ongoing
9. Storage extension agreements	Coordinate entities	Clerk's BCC Rec. Mgmt.-C Co. Adm., Co. Depts. – T	Analytical staff	Start 2 nd Qtr 2008 Ongoing
10. Email Management		Clerk's BCC Rec. Mgmt.-C Co. Adm., Co. Atty., IT, IS, Co. Depts. – T	Analytical staff Email mgmt. software Training staff Training computer access	Start 4 th Qtr 2008 Ongoing

LOOKING AHEAD – DEPARTMENTAL GOALS

Clerk's BCC Records Management Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
11. Board Records Imaging				
11a. Current Records Imaging	Coordinate entities	Board Records Clerk's BCC Rec. Mgmt. F/S Co. Atty. Co. Admin.	Documentum software Access software Scanners Staff Service Space	Current: Start 1 st Qtr 2007 and ongoing
11b. Historical records imaging	Coordinate entities	Board Records Clerk's BCC Rec. Mgmt. F/S Co. Atty. Co. Admin.	Documentum software Access software Scanners Staff Service Space	Historical: Start 3 rd Qtr 2007 Finish 4 th Qtr 2008

LOOKING AHEAD – DEPARTMENTAL GOALS

Branch Operations (St. Pete)

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Provide alternate methods to serve customers				
1a. Increase online services (forms, payments, search engine, info) Online – Video for Payment	Customer satisfaction Proactive excellence	Branch Mgr – C Branch employees - TM IT - TM Community - TM County agencies – TM Clerks IT - TM	Computer hardware and software Facility space Budgeted \$\$\$ Vendor/support & resources	1 st Qtr 2007 – Plan/project mgt 2 nd Qtr 2007 – Final/propose mgt plan 3 rd Qtr 2007 – Purchase software/equip 4 th Qtr 2007 – Program/develop 1 st Qtr 2008 – Schedule/Test 2 nd Qtr 2008 – Train/implement 3 rd Qtr 2008 – Monitor/Debug 4 th Qtr 2008 – Review success
1b. Expand service locations beyond government facilities (kiosks, banks, malls, etc.)	Customer satisfaction Proactive excellence	Branch Mgr – C Branch employees - TM IT - TM Community - TM County agencies – TM Clerks IT - TM	Computer hardware and software Facility space Budgeted \$\$\$ Vendor/support & resources	

LOOKING AHEAD – DEPARTMENTAL GOALS

Branch Operations (St. Pete) Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Gov't Channel Partnership w/channel 18 (office services available)				
2. Self Help Center				
2a. ID Needs	Customer Satisfaction	Branch mgt Bar Assoc. Employees IT	Space equipment	Jan. 2008
2b. Contract with attorneys	Customer Satisfaction	Branch mgt Bar Assoc. Employees IT	Space equipment	Jan. 2008
Clarify passport info				
Increase Online Services				
Old Marriage license/tax roll online				
Mediation and deferred payments				
TV monitor – Information on Services Closed captioned Spanish – sign language				
Improve/reorganize numbering system				
Probate Tutorial video				
Online public video access – touch screen				
Expand Kiosk to accept child support				
Expand Online forms				
Review Space/ Check-in Location (lobby)				

LOOKING AHEAD – DEPARTMENTAL GOALS

Branch Operations (Tyrone)

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Provide alternate methods to serve customers				
1a. Increase on-line services (forms, payments, search engine, info); Passport info –better; payment info – online checklist; specific to Pinellas; clerk requirements	Customer satisfaction Proactive excellence	Branch Mgr–C Branch employees - TM IT - TM Community - TM County agencies – TM Clerks IT - TM	Computer hardware and software Facility space Budgeted \$\$\$ Vendor/support & resources	1 st Qtr 2007 – Plan/project mgt 2 nd Qtr 2007 – Finalize/propose mgt plan 3 rd Qtr 2007 – Purchase software/equip 4 th Qtr 2007 – Program/develop 1 st Qtr 2008 – Schedule/Test 2 nd Qtr 2008 – Train/implement 3 rd Qtr 2008 – Monitor/Debug 4 th Qtr 2008 – Review success
1b. Expand service locations beyond government facilities (kiosks, banks, malls, etc.)	Customer satisfaction Proactive excellence	Branch Mgr–C Branch employees-TM IT - TM Community - TM County agencies – TM Clerks IT - TM	Computer hardware and software Facility space Budgeted \$\$\$ Vendor/support & resources	

LOOKING AHEAD – DEPARTMENTAL GOALS

Branch Operations (Tyrone) Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2. Self Help Center				
2a. Identity Needs	Customer Satisfaction	Branch Mgt Bar Assoc. Employees IT	Space Equipment	Jan. 2008
2b. Contract with attorneys	Customer Satisfaction	Branch Mgt Bar Assoc. Employees IT	Space Equipment	Jan. 2008
3. Customer Service Numbering system. a. What we need. What's available?	Customer service satisfaction; manage change, coordination E; skills and cap; proactive exc.	Mgrs, FRS, Clerk's IT Info booth, rep; printing services	Money Equipment Software Printer IT Clerk's IT	
b. Integrate number system with P.A. system and TV monitor (display number being served)	Customer service satisfaction; manage change, coordination E; skills and cap; proactive exc.	Vendor	Software Money	1 st Qtr 2008
c. Public education of new system		Vendor Pinellas 18 – announcements/ video		1 st Qtr 2008

LOOKING AHEAD – DEPARTMENTAL GOALS

Branch Operations (North County)

Bold Steps/ Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Provide alternate methods to serve customers				
1a. Increase online services (forms, payments, search engine, info) Links to other govt forms (passport, marriage). Affidavits inability to provide proof – ins. Reg. Foag; Indigency; transfer liability parking; probate dispose; notice of conviction (NOC)	Customer satisfaction Proactive excellence	Branch Mgr – C Branch employees - TM IT - TM Community-TM County agencies – TM Clerks IT - TM	Computer hardware and software Facility space Budgeted \$\$\$ Vendor/support and resources	1 st Qtr 2007 – Plan/project mgt 2 nd Qtr 2007– Final/propose mgt plan 3 rd Qtr 2007 – Purchase software/equip 4 th Qtr 2007 – Programming/develop 1 st Qtr 2008 – Schedule/Test 2 nd Qtr 2008 – Train/implement 3 rd Qtr 2008 – Monitor/Debug 4 th Qtr 2008 – Review success
Online warning – for defensive driving; online mediation/deferred payment; debit court registry deposits				

LOOKING AHEAD – DEPARTMENTAL GOALS

Branch Operations (North County) Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1b. Expand service locations beyond government facilities (kiosks, banks, malls, etc.)	Customer satisfaction Proactive excellence	Branch Mgr – C Branch employees - TM IT - TM Community-TM County agencies – TM Clerks IT - TM	Computer hardware and software Facility space Budgeted \$\$\$ Vendor/support and resources	
Post office; better location of kiosks (outside ATM's)				
2. Self Help Center				
2a. Identify needs Post Office/stamp/envelope/ vendor machine/ search engine to questions, go to forms needed and print	Customer Satisfaction	Branch Mgt Bar Assoc. Employees IT	Space Equipment	Jan. 2008
*Touch screen for instructions; educational traffic video; multiple lang., sign lang., delinquent; tenant video				
2b. Contract with attorneys	Customer Satisfaction	Branch Mgt Bar Assoc. Employees IT	Space Equipment	Jan. 2008
3a. Better signs for North County - prior to turn. Customer parking sign faces wrong way. Sign at Curlew intersection - north bound side.				
Recycle bins-location				

LOOKING AHEAD – DEPARTMENTAL GOALS

Technology Cost Center

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Imaging and Electronic Records				
1a. System Interoperability	Customer satisfaction Proactive excellence	Clerk – C Tech Staff–TM Directors–TM Dept Staff–TM Records Mgt	\$\$\$ County IT Vendors Tech staff	4 th Qtr 2007
Application Integration				
Standards and features governance				
1b. Business process management	Customer satisfaction Proactive excellence	Clerk – C Tech Staff–TM Directors–TM Dept Staff–TM Records Mgt	\$\$\$ County IT Vendors Tech staff	
Define workflow; workflow governance				
Training, ownership, technical expertise at all levels				
Sharepoint				
2. E-filing				
2a. FACC E-filing portal	ALL	Clerk – C FACC – C Judiciary - C Tech Staff–TM Directors – TM Dept Staff–TM	\$\$\$ County IT Vendors Tech staff	4 th Qtr 2008

LOOKING AHEAD – DEPARTMENTAL GOALS

Technology Cost Center Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Standards				
Project coordination				
BPM				
2b. XML Workflow	ALL	Clerk – C FACC – C Judiciary - C Tech Staff–TM Directors – TM Dept Staff–TM	\$\$\$ County IT Vendors Tech staff	
3. Call Center Expansion				
3a. Identify knowledge base	Customer Service	Manager Asst. Manager Supervisor Trainer Staff	\$\$\$ IT Telephone system Facilities Mgt.	Jan. 2008
Training				
3b. Staffing needs	Customer Service	Manager Asst. Manager Supervisor Trainer Staff	\$\$\$ IT Telephone system Facilities Mgt.	
3c. Identify software				
3d. Alternative contact methods				

LOOKING AHEAD – DEPARTMENTAL GOALS

Court/Operational Services

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Procedural Memos on our intranet site 2. Communicate changes	Customer Satisfaction	1.Colleen (C) 1.All (T) 2.Ass't Directors (C)	1.Karen Case 1.Trianing 2.All	1. 05/01/07 2. 04/01/07
Leave Request Training	Skills and Capabilities	Vanessa (C)	Exempt Staff Clerks I.T.	04/01/2007
Filing Double Encumber Purchasing Mgr <ul style="list-style-type: none"> • Develop New Job Description 	Managing Change	Carol. L Jeff–Colleen (T)	Advertising Applications	05/01/2007 04/01/2007
	Coordination of Entities			
1. Knowledge Transfer 2. Imaging of Office Files	Proactive Excellence	All (C) (T) Colleen (C) Staff (T)	1. Us 1. Action Plan 2. \$\$\$ 2. Clerk's I.T. Vendor Software	2. Jan. 2010

LOOKING AHEAD-DEPARTMENTAL GOALS

Recording

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
All Online Images will be redacted in accordance with F.S. 119.0714(3)(2)	Customer satisfaction Coordinate entities Proactive excellence	Rec. Svc. – C Clerk's IT – T County IT – T	Software Vendors Training Staff Clerk's IT County IT	2 nd Qtr 2006 2 nd Qtr 2008
Revise workflow in recording process; Assign functions in OnCore for staff	Skills and capabilities Managing Change	Rec. Svc. Mgmt & Supervisors-C Staff – T	Training	1 st Qtr 2007 2 nd Qtr 2007
Automated indexing of most common recordable documents	Skills and capabilities Coordinate entities Proactive excellence	Rec. Svc. – C Vendor – T County IT – T	Software Vendor Training Staff County IT	1 st Qtr 2006 2 nd Qtr 2007
Passport and wedding photo service within the recording areas of the Clerk's Office	Customer satisfaction Proactive excellence Skills and Capabilities Managing change	Rec. Svc. – C Staff – T	Passport camera Printer Training Staff	1 st Qtr 2007 3 rd Qtr 2007

LOOKING AHEAD-DEPARTMENTAL GOALS

Finance Division: Overall

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1.				
1a. Develop system for evaluating staff skills & implement focused employee training program to enhance employee development & succession planning	Employee development, managing change & proactive excellence	Directors – C Managers–TM	Internal staff	June 2009
1b. Identify & implement ways to streamline year end closing, audit & annual financial reporting process	Customer Satisfaction Coordinate entities Proactive excellence	Directors – C Managers-TM	Outside Consultant and Internal Staff	Dec. 2009
1c. Continue development of Finance Division Intranet pages for all departments within the Finance Division	Customer satisfaction, managing change and proactive excellence	Directors – C Managers-TM	Internal Staff	June 2009
2.				
2a. Enhance content and frequency of training programs offered to internal customers	Employee development, customer satisfaction & proactive excellence	Directors – C Managers-TM	Internal Staff	Ongoing

LOOKING AHEAD-DEPARTMENTAL GOALS

Finance Division: Payroll

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Open Systems				
1a. Contract review/doc management electronic Individuals input time/Feeds to Pay Clerk/then Time Sheets direct loads from Dept. Online Pay Actions – self verification of parameters and ranges	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	CDD – C Directors – TM Managers - TM	Outside consultant All items require internal IS support and Consultants	1st Qtr 2008
Online forms completed by Emp Benefit/W4 forms online by HR feed United Way, other deductions – employee signup online and feeds directly to HR and PR	On Demand W2, Paystub Reprints from screens by employee ACH changes online		Employee base training	

LOOKING AHEAD – DEPARTMENTAL GOALS

Finance Division: Payroll Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1b. Oracle ERP A/P Direct Reimbursement feed directly into Payroll (Travel, Meals, etc.). Time Entry Verification based on Personnel Rules (Run by HR system-feeds PR) better reporting options (customized) automatic parameters for PR runs	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers - TM	Outside consultant (training and programming) Additional staff Record Management AP Manager IS Personnel	3 rd quarter 2008
1c. Implement Oracle Time and Labor for use by Board and Clerk Departments to report time	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers & Supervisors – TM	Internal staff and consultant	Aug. 2008
1d. Implement Oracle Payroll for processing Board and Clerk payroll	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers & Supervisors – TM	Internal staff and consultant	Jan. 2010

LOOKING AHEAD – DEPARTMENTAL GOALS

Finance Division: Payroll Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1e. Implement Oracle Employees self-service module to allow form completion by employees for benefits, W-\$ forms, deductions, access to W-2's etc.	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers & Supervisors – TM	Internal staff and consultant	June 2010
2. Employee Development				
2a. Develop skills inventory	All	Managers – C Supervisors - TM	Internal staff time; tracking system; emp testing & eval of current skills	1 st Qtr 2008
Develop Skill Questionnaire and Log/Dbase			Training Dept – provide Basic Skill Level Worksheets	
2b. Focus training programs	All	Managers – C Supervisors - TM	Training Dept – provide Basic Skill Level Worksheets	3 rd Qtr 2008
Oracle Training Programs			\$\$\$	
Side Frame Reporting Training SQL and Crystal Reports Training				
Excel Training – all levels				
Departmental Training of new Self-Service Module				

LOOKING AHEAD-DEPARTMENTAL GOALS

Finance Division: General Ledger

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Open Systems				
1a. Contract review/doc management electronic	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	CDD – C Directors – TM Managers - TM	Outside consultant	1st Qtr 2008
			Imagine capability; security management; microfilm conversion? Hard copy conversion? Image/document management training	
1b. Oracle ERP	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers - TM	Outside consultant (training and programming) Additional staff Record Mgmt	
1b. Oracle ERP	Dept strategies Acct # structure Function code Project definition requirements; software security		Time to prepare reports; testing – unit parallel; report development; training – Crystal - database	

LOOKING AHEAD – DEPARTMENTAL GOALS

Finance Division: General Ledger Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
	Reports needed by dept		Roles/duties – realignment; interface requirements – today/tomorrow; staff to promote culture change	
1c. Implement Oracle General Ledger module as part of integrated Oracle Financials Suite	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers-TM	Internal staff	Sept. 2009
1d. Develop new financial reports for use in quarterly & year end closing process	Customer Satisfaction Proactive excellence	Directors – C Managers-TM	Internal staff	Sept. 2009
2a. Develop skills inventory	All	Managers – C Supervisors - TM	Internal staff time; tracking system; emp testing and eval of current skills Desired future skills	1st Qtr 2008
2b. Focus training programs	All	Managers – C Supervisors - TM	Internal staff time; tracking system; emp testing and eval of current skills Desired future skills	3 rd Qtr 2008

LOOKING AHEAD-DEPARTMENTAL GOALS

Finance Division: Board Records

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Open Systems				
1a. Contract review/doc management electronic	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	CDD – C Directors – TM Managers - TM	Outside consultant	1st Qtr 2008
Agenda Integration W/DCR	All	Manager – C, Board reports TM	FIS	2 nd Qtr 2007
Document Management System	All	CDD-C, Entire Department TM	Image One - Consultant	1st Qtr 2007 Fully functional 4 th Qtr 2007
VAB System	All	Manager – C property, staff- TM Appraiser	FIS	3rd Qtr 2007
Continue enhancing access database for VAB so that all recommendation worksheets & final decision letters can be produced by Board Records	Coordinate entities and proactive excellence	Directors – C Managers-TM	Internal Staff	Dec. 2008

LOOKING AHEAD – DEPARTMENTAL GOALS

Finance Division: Board Records Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Collaborate with Board Departments on development of an agenda automation – contract review system	Customer Satisfaction Coordinate entities Proactive excellence	Directors – C Managers-TM	Outside consultant and internal staff	Dec. 2009
1b. Oracle ERP	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers - TM	Outside consultant (training and programming) Additional staff Record management	3 rd Qtr 2008
2a. Develop skills inventory	All	Managers – C Supervisors - TM	Internal staff time; tracking system; emp testing & eval of current skills	1st Qtr 2008
Employee Skill Self-Assessment	All	All staff		1 st Qtr 2007
Access DB training	All	Dept Staff	Internal staff	2 nd Qtr 2007
Documentum training	All	Other County Departments	Internal staff	3 rd Qtr 2007
VAB training	Support staff	Manager, support staff	Internal staff	2 nd & 3 rd Qtr
Access overview training prior to use				

LOOKING AHEAD – DEPARTMENTAL GOALS

Finance Division: Board Records Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2b. Enhance the departments' change management system to ensure that policies & procedures are appropriately authorized, staff are appropriately informed of changes & trained on new procedures	Managing change and employee development	Directors – C Managers – TM	Internal staff	Dec. 2009

LOOKING AHEAD-DEPARTMENTAL GOALS

Finance Division: Accounts Payable/Accounts Receivables

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Open Systems				
1a. Contract review/doc management electronic	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	CDD – C Directors – TM Managers - TM	Outside consultant	1st Qtr 2008
1b. Oracle ERP – Identify Oracle vendors	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers - TM	Outside consultant (training & programming) Additional staff Record management	3 rd Qtr 2008
Adjusting workload; modify procedures; integrating a/r system		Supervisors-C A/P and A/R-T	Adjusting workload; time; team building; statistical data prog. Time	
1c. Implement Oracle Accounts Payable module as part of the integrated Oracle Financial Suite	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers & Supervisors - TM	Internal staff and consultant	July 2009

LOOKING AHEAD – DEPARTMENTAL GOALS

Finance Division: Accounts Payable/Accounts Receivables Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Implement Oracle Accounts Receivable module as part of the integrated Oracle Financial Suite	Customer Satisfaction Managing Change Coordinate entities Proactive excellence	Directors – C Managers & Supervisors - TM	Internal staff and consultant	July 2009
1d. Develop a system for internet access to vendor payment records for Board and Clerk	Customer Satisfaction Coordinate entities Proactive excellence	Directors – C Managers & Supervisors - TM	Internal staff and consultant	Feb. 2008
1e. Collaborate with Utilities Dept. on implementation of SAP system	Customer Satisfaction Coordinate entities Proactive excellence	Directors – C Managers & Supervisors - TM	Internal staff	Feb. 2008
2. Employee Development				
2a. Develop skills inventory	All	Managers – C SupervisorsTM	Internal staff time; tracking system; emp testing & eval of current skills	1st Qtr 2008
2b. Focus training programs	All	Managers – C SupervisorsTM	Internal staff time; tracking system; emp testing & eval of current skills	3 rd Qtr 2008

LOOKING AHEAD-DEPARTMENTAL GOALS

Finance Division: Financial Reporting

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Open Systems				
1a. Contract review/doc management electronic – Searchable topic; vendor contracts, projects, grants, purchasing. Bid documents included with workflow that starts in board records	Customer Satisfaction; Managing Change; Coordinate entities; Proactive excellence	CDD – C Directors – TM Managers - TM	Outside consultant	1st Qtr 2008
Involving employees at all levels	Customer Satisfaction; Managing Change; Coordinate entities; Proactive excellence		All depts. involved to sit in with creating the statement of work	
1b. Oracle ERP	Customer Satisfaction; Managing Change; Coordinate entities; Proactive excellence	Directors – C Managers - TM	Outside consultant (training & programming) Additional staff Record Mgmt. Oracle staff	3 rd Qtr 2008
Training people straight from Oracle in house-training	Customer Satisfaction; Managing Change; Coordinate entities; Proactive excellence			

LOOKING AHEAD – DEPARTMENTAL GOALS

Finance Division: Financial Reporting Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1c. Implement Oracle Fixed Assets module as part of integrated Oracle financials suite	Customer Satisfaction; Managing Change; Coordinate entities; Proactive excellence	Directors – C Managers & Supervisors - TM	Internal staff	July 2009
Implement Oracle Projects module as part of integrated Oracle financials suite	Customer Satisfaction; Managing Change; Coordinate entities; Proactive excellence	Directors – C Managers & Supervisors - TM	Internal staff	July 2009
1d. Continue developing & implement new Board Investment policy to maximize yield & develop cash forecasting methods	Customer Satisfaction; Coordinate entities; Proactive excellence	Directors – C Managers-TM	Internal staff	Sept. 2009
Collaborate with Board departments to enhance grants management and reporting	Customer Satisfaction; Coordinate entities; Proactive excellence	Directors – C Managers-TM	Internal staff	Sept. 2009
2b. Focus training programs	All	Managers – C Supervisors - TM	Internal staff time; tracking system; emp testing and evaluation of current skills	3 rd Qtr 2008
Training for Oracle	All			

LOOKING AHEAD – DEPARTMENTAL GOALS

Internal Audit Division

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
1. Clarify/Expand Audit Authority				
1a. Market audit services to other Constitutional Offices and promote citizen awareness	Coordinate entities Proactive excellence Managing change	Director – C Managers – T and assistance from Clerk	Staff time More staff State of the art audit software Training (white collar crime efficiency)	Now to 4 th Qtr 2008 3 rd Qtr 2007 to 3 rd Qtr 2008 Now to 2 nd Qtr 08
1b. Formalize audit authority and responsibilities	Coordinate entities Proactive excellence Managing change	Director – C Managers – T and assistance from Clerk	Staff time More staff State of the art audit software Training (white collar crime efficiency)	Now to 4 th Qtr 2008 3 rd Qtr 2007 to 3 rd Qtr 2008 Now to 2 nd Qtr 08
2. County's Primary Consulting Resource				
2a. Market consulting services	Customer satisfaction Coordinate entities Proactive excellence Managing change	Director – C Managers – T	Staff time More staff (skilled in consulting services)	Now to 3 rd Qtr 2008 Now to 3 rd Qtr 2007

LOOKING AHEAD – DEPARTMENTAL GOALS

Internal Audit Division Continued

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
2b. Develop technical advisory group	Customer satisfaction Coordinate entities Proactive excellence Managing change	Director – C Managers – T		Now to 4 th Qtr 2007 to 3 rd Qtr 2008
3. Enhance Audit Selection	Customer Satisfaction Proactive Excellence Coordination of Entities	H. Collazo - C M. Dondero-T R. Ovesen - T	Staff Time Auditee Time	Now to 4 th Qtr 2007

LOOKING AHEAD – DEPARTMENTAL GOALS

CLERK'S TECHNOLOGY

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Clarity time tracking software to include Leave Slip Reasons	Customer satisfaction Proactive excellence Managing change			TBD
Explore Clarity ideal state usage by IT	Customer satisfaction Proactive excellence			Start FY 2009
Expansion of Tech Knowledge Base to facilitate uniform, accuracy, and rapid response to support issues.	Customer satisfaction Proactive excellence			TBD
Tech Cross Training	Proactive excellence Managing change			TBD
Check Printing plan for business continuity between Clerk's Accounting/CJC and Finance Division to include plan for disaster recovery when both locations are incapacitated.	Customer satisfaction Coordinate entities Proactive excellence			TBD
Review Finance Programming Staff positions to determine eligibility for professional exempt status.	Coordinate entities Proactive excellence			TBD
Explore replacement of physical Fax machines with enterprise RightFax software.	Customer satisfaction Proactive excellence Managing change			TBD

LOOKING AHEAD – DEPARTMENTAL GOALS

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Virtual Machine Desktop Computers. The deployment strategy targets specific types of application usage. Candidates are Public Jury Room, Call Center, Public View Stations and Break Rooms	Coordinate entities Proactive excellence Managing change			TBD
Virtual Server Consolidation to provide ease of provisioning, fault tolerance and ability to restore onto dissimilar hardware; useful for disaster recovery	Customer satisfaction Coordinate entities Proactive excellence Managing change			TBD
Exploring the future Oracle Support Model required by Oracle Project Unified System project to ensure BCC Purchasing, OMB, Unified Personnel & Clerk Finance have a coordinated team strategy required by the integrated nature of ERP system.	Customer satisfaction Coordinate entities Proactive excellence Managing change			TBD
Oracle Training to bridge Finance INFOR system knowledge into Oracle.	Customer satisfaction Coordinate entities Proactive excellence Managing change			TBD
Participate in review of approved PIM projects to point out risks, dream and collaborate.	Customer satisfaction Coordinate entities Proactive excellence Managing change			TBD

LOOKING AHEAD – DEPARTMENTAL GOALS

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Explore Mainframe green screen modernization alternatives for Civil and Probate.	Customer satisfaction Coordinate entities Proactive excellence Managing change		Clerk Vendors	TBD
Explore 3 rd Party Vendor Case Management solutions for Civil and Probate.	Customer satisfaction Coordinate entities Proactive excellence Managing change		Vendors	TBD
Delivery of Juvenile In-Court Docketing (ICD) to enable real time data to capture savings and eliminate need for delayed back office processes.	Customer satisfaction Proactive excellence Managing change			April 2008 Aug. 2008
Explore management of Clerk Technology projects using a Portfolio Approach.	Customer satisfaction Proactive excellence Managing change			TBD
Point of Sale (POS) documentation that spans all Clerk fine and fee payments to Clerk's Accounting for Fund distributions to CJIS for obligation updates.	Customer satisfaction Coordinate entities Proactive excellence Managing change			TBD

LOOKING AHEAD – DEPARTMENTAL GOALS

Bold Steps/Actions	Strategic Pillar	Champions (C) Team Members (T)	Resources Needed	Timeline
Define opportunities for Statewide Civil Data Sharing Standards.	Customer satisfaction Proactive excellence Managing change			TBD
Explore a Global 360 Report Management Tool.	Customer satisfaction Proactive excellence Managing change			TBD