

Attachment B

County Counsel Department Response to KPMG Review and Implementation Timeline

Recommendation 1.1: Enhance regular caseload and activity tracking to improve data-driven decision-making related to staffing mix, resource allocation, and task assignment.

Response: Agree

Timeline: Fall 2023

- In progress: New updated case management system will allow us to run more detailed, regular reports on caseload and activity tracking to improve decision making on staffing and resource allocation. Ongoing.
- Completed: Began evaluating attorney time spent on administrative tasks and evaluated whether some tasks could be moved from attorneys to Legal Office Professionals (LOPs). Ongoing.
 - Implemented additional time codes.
 - Identified tasks that could be consolidated with LOPs and potentially Administrative Office Professionals (AOPs).
 - Interviewed attorneys and LOPs about workload, tasks and training.
 - Found that attorneys did not have enough administrative support and LOPs were doing tasks that could be done by AOPs.
 - Found that attorney managers were doing tasks that could be done by a non-attorney.
- Completed:
 - Implemented changes to assignments for LOPs to streamline specialized skills and make more efficient.
 - Engaged with CEO's office about staffing needs.
 - 1 AOP positions (convert Extra Help to make permanent).
- In progress: For management, KPMG report found that benchmark counties had a rate of supervision of 1 manager to 3 attorneys. We have a ratio of 1 manager to 8 attorneys.
 - Submitted request for reclassification to create new non-attorney manager, Operations Support Manager (Team Project Leader), which should allow attorney managers more time to supervise attorneys as to substantive legal issues. Approved by HR and CEO.
 - Recruitment opened in early March 2023 and position filled April 17, 2023.

Recommendation 1.2: Enhance reporting and tracking of outside counsel utilization by case type to consistently evaluate internal staffing needs and enhance budget planning.

Response: Agree

Timeline: Summer 2023

- Completed: Developed reports that track outside counsel by firm and case type. Management team meets monthly to track outside counsel time and evaluate budget. Ongoing.
- Completed: As recommended, evaluated functions of outside counsel and identified one type of case that could be handled in-house in more cost-effective manner with additional staffing. Ongoing.
- In progress: Recruitment to add one attorney resource in FY 23/24 for litigation and reduced outside counsel budget accordingly.

Recommendation 2.1: Enhance data tracking and reporting related to case outcomes, staff productivity, and performance to allow for increased operational oversight.

Response: Agree

Timeline: Spring 2024

- In progress: New updated case management system will allow us to run more detailed, regular reports on caseload and activity tracking to improve decision making on staffing and resource allocation.
- In progress: New Operations Support Manager will be responsible for completing implementation of new case management system, oversight of system, data tracking and reporting, and implementation of KPMG recommendations.
- Completed: Developed metrics and additional performance measures that are more meaningful and added to budget report for 2023-2024 budget D-pages including: debriefing process, use of technology and training, implementation of process improvements, and soliciting annual feedback from departments on legal services.

Recommendation 2.2: Conduct an assessment of internal training needs for LOPs and develop formal internal debrief processes to allow for more proactive education.

Response: Agree

Timeline: Spring 2024

- Completed: Interviewed attorneys and LOPs about workload, tasks and training.
 - Implemented changes to assignments for LOPs to streamline specialized skills and make more efficient.
 - Engaged with CEO's office about staffing needs.

- Added 1 AOP position (one existing Extra Help position to make permanent). Recruitment will begin summer 2023.
- Completed: Developed formal internal debrief process to allow for more proactive education.
 - Announced implementation to staff.
 - Scheduled quarterly meetings for proactive training on litigation issues. At each quarterly meeting, case updates will be covered, that include new legal issues and case outcomes.
- Completed: Developed annual training schedule for all LOPs as well as identified individual training needs.

Recommendation 2.3: Enhance frequency and approach to County Department training and formalize debrief approaches to allow for more proactive education and communication across County Departments.

Response: Agree

Timeline: Spring 2023

- Completed: In coordination with Risk Management, developed debrief process with other County Departments to allow for more proactive education. Ongoing.
 - Developed form to streamline feedback.
 - Announced implementation to staff.
- Completed: In addition to existing training for individual departments, developed annual training schedule for County Departments including what to expect in litigation, litigation document holds, and document productions.
- In progress: Implementing new training schedule and rolling out to County Departments. Ongoing.

Recommendation 3.1: For complex cases received from Assessor, County Counsel should work with Assessor to develop additional internal criteria to assess workload to allow for enhanced decision-making on caseload assignment, staffing, and resource mix.

Response: Agree

Timeline: Spring 2023

- Completed: In coordination with Assessor, developed internal thresholds to identify non-complex cases that would benefit from County Counsel support and with which County Counsel could assist upon Assessor's request.

Recommendation 3.2: Engage with the Assessor to obtain access to the assessment appeals documents to streamline information sharing processes between both departments.

Response: Partially Agree

Timeline: Spring 2023

- Completed: County Counsel has engaged with the Assessor and agreed to use SmartSheet and Box to share documents and streamline information sharing. Ongoing.
- Completed: County Counsel coordinated with Assessor and it is not practical to share documents by providing County Counsel's Office access to Assessor's network. Due to confidentiality of information therein which is not necessary for County Counsel's representation of Assessor in the appeals.

Recommendation 3.3: Establish a data reporting framework across County Counsel, Clerk of the Board, and the Assessor's Office to enable a process wide view of performance across the assessment appeals process.

Response: Agree

Timeline: Fall 2023

- Completed: In coordination with Assessor and Clerk of the Board, identified enhancements to current Assessment Appeals database to track filings and hearing dates (similar to a court docket). This will enable the recommended tracking of number of cases, types of cases, timing of filings (applications, correspondence, briefs, and other pleadings), hearings and outcomes.
- In progress: County Counsel coordinated with Clerk of Board to confirm that the Clerk has engaged a current IT consultant to work on adding categories for tracking, reporting and analytics in Assessment Appeals database- consultant is also working on develop reporting capabilities which would allow Assessor, County Counsel and Clerk of the Board to separately run reports and track progress.