

GLENN W. ROBERTSON & ASSOCIATES

Response to the Clerks of Court Operations Corporation's (CCOC) November 2009 Request for Proposals for Budget Services December 14, 2009

Glenn W. Robertson & Associates (GWRA) Information

GWRA Established in 1988.

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Glenn W. Robertson's Experience and Education in Summary

- Ten years in City and County Government: including being Pinellas County Assistant County Administrator and Director of Budgeting & Evaluation.
- Almost ten years in State of Florida government: Director of the Office of Policy and Budget (OPB) for three Governors (Democratic and Republican); a principle designer of the Governor's OPB and its performance focused budgeting systems.
- 21 years in GWRA: government and business finance, budget and integrated performance system consulting.
- 7 years experience with helping to design, develop and implement Article V budget & performance systems for Florida's Clerks of the Court: working with the Florida Association (FACC) and the State's Clerks of Court Operations Corporation (CCOC); familiarity with all actors involved in the Article V Clerks' process.
- MA in Economics; MS in Public Management; BA in Economics; BA in Social Sciences (University of South Florida)
- Numerous acknowledgements of budgeting expertise, including National Association of Budget Officers presidency and life-time member honors.

Business Principles and Values

Provide the CCOC with expert budget and performance related services based on 41 years of City, County and State of Florida government and private business experience in designing, developing, implementing and operating finance, budget and policy and performance systems.

Be able to provide the CCOC with consulting dollar value: with the experience and knowledge gained and with the contact base achieved over the years, GWRA can usually service complex CCOC needs in a relatively short time.

Be dedicated to CCOC needs: be responsive and available whenever needed, for as long as needed.

Be a team player within the CCOC: provide services in a respectful , constructive and supportive manner.

Be credible with all parties working with CCOC to provide maximum support to help achieve CCOC objectives (e.g. The Governor's Office, the Legislature, the Department of Financial Services, The Auditor General's Office, the Legislature's Economic & Demographic Research Office, Department of Revenue).

Capacities Related to CCOC Scope of Services Interest

Stakeholder Coordination and Support

- As Director of Governor's OPB and with subsequent years of working with the Legislature, Governor's Office and other state stakeholders, GWRA has worked to be personally and professionally credible and persuasive within State government and to have a positive personal and business reputation.
- GWRA has worked with the all actors involved with Article V and the Clerks' budgeting initiatives for seven years and has strived for credibility within the CCOC and with Clerks and their staff.

Information Technology & Budget Systems design and Development Support

- GWRA has 40 years of experience in designing and developing integrated budget systems and software.
- GWRA works well with IT professionals and is capable of providing guidance to help technical systems meet CCOC manager, CCOC Council and Clerks' Office needs.
- GWRA is experienced in working with CCOC IT support initiatives related to general budgeting and new unit cost related budgeting requirements.

Performance Measurement Systems development and Use

- GWRA developed performance budgeting related systems for many state agencies and local governments in Florida – providing a critical understanding of State expectations for budget and performance integration.
- GWRA has worked many years with the FACC and the CCOC in setting up Article V performance measures.
- A GWRA business focus is to set up integrated planning, policy, budget, finance and performance systems.

Budget Preparation, Analysis and Implementation

- GWRA is familiar with all aspects of the CCOC Article V budgeting system and its implementation.
- GWRA has worked many years with the CCOC, with individual Clerks and with the FACC and with state stakeholders involved in Article V budgeting.
- GWRA is proud to have been part of a CCOC/Clerk/State Stakeholder team that has established sophisticated budgeting systems within tight timeframes in a credible manner since 2003.
- GWRA is experienced in setting up budgeting systems and analytical capacities that are now required in law (2009 SB 2108). GWRA has vast experience in analyzing organizational revenues, expenditures, unit costs trends, workload standards and performance.
- GWRA is quite experienced in developing and working Legislative Budget Requests through the Appropriations process.
- GWRA is quite experienced in setting up operational budgets that implement approved Legislative Appropriations.

- GWRA is experienced in creating and implementing Budget Education & Training for Clerks who are challenged to implement Article V budgeting systems in short periods of time AND are challenged to manage budgets being affected by changing economic conditions and State budget responses.
- GWRA is experienced in preparing graphic presentations and communicating complex budgetary issues.

Unit Costs Budgeting and Efficiency Analysis

- GWRA has set up numerous Unit Cost Budgeting systems for government and business clients.
- GWRA is quite experienced in setting up and implementing efficiency analysis systems that integrate budget, operations and performance storylines when considering, testing and implementing efficiency initiatives.

Long Range Program Planning (LRPP)

- GWRA is quite familiar with the State of Florida's Long Range Program Planning (LRPP) process and has developed numerous LRPPs for state government clients.
- GWRA provides clients with methodologies to integrate LRPPs and Legislative Budget Requests.
- GWRA provides clients with integrated LRPP, budgets and operational work plans to help in organizational management needs.

References:

1. Clerks of Court Operations Corporation (CCOC) leadership.
2. The Honorable Bob Inzer, Clerk of the Courts for Leon County.
3. Governor's Office of Policy & Budget: Jerry McDaniel, Director; Ted Mannelli, Deputy. (488-8710)
4. Legislature: Claude Hendon, Senate Appropriations staff (487-5140); Greg Davis, House Appropriations staff. (488-6204)
5. Economic and Demographic Research Office for the Florida Legislature: Amy Baker (487-1402)
6. Tom Herndon, former Chief of Staff for two Governors (893-2252)
7. Tim Moore, former Commissioner of the Florida Department of Law Enforcement.
8. Numerous persons in Department of Financial Services: the CFO; Burton Marshall

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FEE SCHEDULE

December 2009

Professional Fee

GWRA fee: \$ 125 / hour for services rendered in each of the Clerk of Court Operations Corporation service areas in the Request for Proposal.

GWRA Principle, Glenn W. Robertson, is the service provider.

Expenses

GWRA expenses that have been authorized by the CCOC are requested for reimbursement.