



SHARON R. BOCK  
Clerk & Comptroller  
Palm Beach County

ADMINISTRATIVE POLICY  
April 1, 2008  
(rev. 4/1/09)  
Clerk & Comptroller  
Social Responsibility (CSR) Policy

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**PURPOSE**

***A MESSAGE FROM CLERK BOCK***

As the elected Clerk & Comptroller, I am responsible for protecting, preserving and maintaining public records and public funds. These responsibilities are carried out on behalf of Palm Beach County residents with a focus on integrity, transparency and accountability.

As a citizen, I am committed to making Palm Beach County a great place to raise our families, work, and attract the best and brightest to live and help build our community.

The Clerk & Comptroller Social Responsibility Policy (CSR) was created because:

- We believe we have a responsibility to promote accountability and transparency in government;
- We believe in considering not only our customers and employees, but also our community, when we make decisions;
- We believe we have a responsibility to make a positive contribution to our community;
- We believe in supporting partnerships between businesses, governments, communities and individuals for the betterment of Palm Beach County.

I am proud to work with the world-class team of engaged and enthusiastic employees that are giving meaning to government citizenship and enabling us to carry out this commitment to our community.

Best regards,

Sharon R. Bock, Esq.  
Clerk & Comptroller  
Palm Beach County

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## BACKGROUND

President John F. Kennedy made the following remarks about the responsibilities of individual Americans in Nashville at the 90th Anniversary Convocation of Vanderbilt University, Nashville, Tennessee, May 18, 1963:

*This Nation was not founded solely on the principle of citizens' rights. Equally important, though too often not discussed, is the citizen's responsibility. For our privileges can be no greater than our obligations. The protection of our rights can endure no longer than the performance of our responsibilities. Each can be neglected only at the peril of the other. I speak to you today, therefore, not of your rights as Americans, but of your responsibilities. They are many in number and different in nature. They do not rest with equal weight upon the shoulders of all. Equality of opportunity does not mean equality of responsibility. All Americans must be responsible citizens, but some must be more responsible than others, by virtue of their public or their private position, their role in the family or community, their prospects for the future, or their legacy from the past. Increased responsibility goes with increased ability, for "of those to whom much is given, much is required."*

There are many definitions of social responsibility. Corporate social responsibility is closely linked to business decisions that are based on ethical considerations. It can be defined as an ethical responsibility requiring that corporations assume responsibilities that go beyond profits to contribute to their communities and environment. As defined by The World Business Council for Sustainable Development, located in Geneva, Switzerland and Washington, D.C.:

*"Corporate social responsibility is the continuing commitment by business to behave ethically and contribute to economic development while improving the quality of life of the workforce and their families as well as of the local community and society at large."*

Examples of corporate social responsibility include developing an environmentally friendly manufacturing process, paying fair wages, feeding the hungry, volunteering in schools, building homes for the homeless, or assisting a local charity in a community outreach program.

According to Gordon Brown, Prime Minister of the United Kingdom and Northern Ireland:

*"Today corporate social responsibility goes far beyond the old philanthropy of the past – donating money to good causes at the end of the financial year – and is instead an all-year-round responsibility that companies accept for the environment around them, for the best working practices, for their engagement in their local communities and for their recognition that brand*

*names depend not only on quality, price and uniqueness but on how cumulatively, they interact with companies' workforce, community and environment. ..."*

Corporate social responsibility is at the core of high performing organizations. In fact, the criteria for performance excellence of both the Malcolm Baldrige National Quality Award and Florida Sterling Council include an assessment of an organization's support of the community:

*"Practicing good citizenship refers to leadership and support—within the limits of an organization's resources—of publicly important purposes. Such purposes might include improving education and health care in your community, pursuing environmental excellence, practicing resource conservation, performing community service, improving industry and business practices, and sharing nonproprietary information. Leadership as a role-model organizational citizen also entails influencing other organizations, private and public, to partner for these purposes." Baldrige National Quality Program, Criteria for Performance Excellence 2008*

A recipient of the Florida Governor's Sterling Award, the Clerk & Comptroller is committed to the values of corporate social responsibility, and committed to fostering those values throughout Palm Beach County and beyond.

## **OUR COMMITMENT**

Corporate Social Responsibility is demonstrated in the Clerk & Comptroller's office by our commitment to:

- Our employees;
- The residents of Palm Beach County;
- The communities in which we live and work;
- The services we provide;
- Ethics, accountability and transparency in government.

The Clerk & Comptroller's commitment to corporate social responsibility in public service is unique and innovative. While most government organizations resist change, Clerk Bock recognized early-on the importance of establishing and maintaining close partnerships with local businesses, governments, professional groups, community groups and individuals. Since her election in 2004, she has focused on providing innovative programs and tools — developed after studying best practices and listening to and understanding the needs and concerns of the public — with the ultimate goal of helping to make our community a better place to live and work. This is demonstrated by our commitment to educating the public about government operations, finances and

services. Such citizen empowerment initiatives are a vital part of our social responsibility policy.

## **OUR VISION**

In the absence of competition, some government organizations "go along to get along," without the motivation to improve, reduce costs or deliver high-quality services. The Clerk & Comptroller's office, however, uses a disciplined approach that emphasizes continuous improvement through the creation and implementation of best practices. All employees are driven to do their best and be the best. Our vision, as stated by our employees, is:

*To be recognized as the world-class leader in customer service,  
employee satisfaction and standards of excellence.*

## **OUR VALUES**

The Clerk & Comptroller's values, articulated by our employees, were redefined following Clerk Bock's election to office. These values are not only demonstrated within our offices, but also through our commitment to good government citizenship that supports, educates and empowers our community:

Respect everyone.  
Act with Integrity.  
Embrace Diversity.  
Build Relationships.  
Learn through Innovation.  
Thrive on Challenge.  
Celebrate Achievements.

## **OUR EMPLOYEES**

Our employees and volunteers — our most valuable assets — are wholeheartedly committed to public service. They are engaged with their work and empowered to use innovation to deliver outstanding service. Their enthusiastic embodiment of our values makes the Clerk & Comptroller's office a great place to work.

## **OUR CUSTOMERS**

The Clerk & Comptroller serves a local population of more than 1.3 million. But with advances in technology, we serve countless others all over the world. In our offices, on the telephone and on our Web site, our customers are provided with easy, open access to non-confidential public records that include court cases, property records, county financial information and county commission meeting documents.

## **OUR COMMUNITY**

Described by its Business Development Board, Palm Beach County is the “best of everything,” a community rich in cultural diversity, economic and industrial depth, and artistic and educational offerings. We realize that the business, social and financial health and prosperity of our community directly affect the quality of life of our employees and customers. The quality of life experienced by our employees directly affects our bottom line and our ability to deliver outstanding service. We believe that an investment in our community is an investment in our employees and the customers they serve.

## **POLICY OBJECTIVES**

It is the policy of Clerk & Comptroller’s office to consider social responsibility a vital part of our day-to-day operations. Our leaders act as role models by incorporating those considerations into decision-making in all business activities. Our employees are engaged and enthusiastic about government citizenship. This policy incorporates the following components that reflect existing and emerging standards of social responsibility:

- 1. Adhere to Legal Guidelines:** Commitment to adhere to the statutes, rules and laws that define our duties and responsibilities to the public and to our employees.
- 2. Demonstrate Business Ethics, Transparency and Accountability:** Commitment to maintaining the highest standards of integrity and business governance practices in order to maintain excellence in daily operations, and to promote public confidence in our operations and in county government. Our Ethics Policy provides further detail as to this commitment.
- 3. Continuously Improve Processes and Practices:** Commitment to continuous review of processes and procedures to implement world-class best practices in every area of operation, and to promote good government.
- 4. Provide Open Access to Public Records:** Commitment to providing timely, accurate, complete and courteous responses to requests for public records. The Clerk & Comptroller’s office safeguards essential information required by the public, the court system, county government, law enforcement agencies and other public agencies (e.g., finance data and reports, civil and criminal cases, official records, etc.). The office continuously identifies and implements strategies to improve the accessibility of non-confidential public records.
- 5. Invest in Our Community:** Commitment to supporting those organizations that serve the residents of the county, promote diversity and cultural harmony and seek to improve the lives of area residents. We stress collaborative, consultative, and partnership approaches in our community investment programs. We support and assist the residents of Palm Beach County by fostering development opportunities for area leaders through leadership training and mentorship programs and by contributing to,

respecting and supporting the communities, organizations and cultures with which we work.

**6. Engage, Educate, Empower and Support Residents:** Commitment to the widespread dissemination of county government information to engage public interest and debate, broaden public knowledge and enhance government transparency and accountability. The Clerk & Comptroller is an elected, independent arm of county government, accountable directly to the residents of the county. We are committed to the development and implementation of activities, processes and programs to support, engage, educate, and empower the residents of Palm Beach County. Services and tools developed and implemented by the Clerk & Comptroller's office designed to support, engage, educate and empower residents include:

**a. [www.MyPalmBeachClerk.com](http://www.MyPalmBeachClerk.com)**

Our innovative Web site includes tools designed to provide easy access to information, resources and reports for the convenience of the community.

**b. The Self Service Center**

The Clerk & Comptroller's Self Service Center gives people the choice to handle their own civil court matters such as divorce, small claims and landlord/tenant actions by providing access to more than fifty legal forms at its four Palm Beach County locations. The Center offers attorney consultations for as little as \$15. The Clerk & Comptroller's Web site provides online access to legal forms for small claims, eviction and divorce cases.

**c. The Best Practices Conference**

This annual event brings public and private sector business leaders together to talk about the best practices that can improve the quality of life for everyone in our community. The Clerk & Comptroller of Palm Beach County received the coveted Governor's Sterling Award for "organizational performance excellence." As an award recipient, Clerk Bock demonstrates a continuing commitment to bringing leadership training opportunities to the community and to be a role model of excellence in government. The event brings together nationally-recognized speakers with local leaders in a collaborative learning environment. *Note: The 2009 Best Practices Conference is cancelled due to the economic challenges facing government, non-profit and private sector organizations, as well as the event's sponsors. We hope to resume the event in 2010. If you would like to receive announcements about the event, please e-mail our office.*

**d. Domestic Violence Awareness**

The Clerk & Comptroller's office partners with service providers to increase awareness of the issues surrounding domestic violence. The office's Web site and publications provide education, tools and resources for the community.

**e. Juror Appreciation Month and Jury Duty Employer Appreciation Award**

Jury service is celebrated in partnership with other court officials, by a ceremony in conjunction with the county's annual "Law Week" and other observances throughout the month of May. To provide employees the opportunity to meet their civic obligation, many employers allow employees to receive both time off and a regular salary when serving jury duty. The Clerk & Comptroller sponsors a yearly award to recognize civic-minded employers with citizenship-minded jury service policies.

**f. Support of Charities**

All Clerk & Comptroller employees have the option of donating \$2 per week to "dress down" for charity on Fridays. Donations are given to local nonprofit organizations selected by the employees at an annual ceremony. Since 1994 the Clerk & Comptroller's office has contributed more than \$500,000 to local charities.

The office also participates in an annual Food for Families and Children's Charity Drive.

Circuit Sound, the Clerk's choir, performs during the holiday season and donations at performances are given to a local charity selected by the singers.

**g. The Comprehensive Annual Financial Report (CAFR)**

The CAFR is a comprehensive report on all county finances. The report has been awarded the Certificate of Achievement for Excellence in Financial Reporting every year since 1989 - an honor which bestows national recognition on the office.

**h. *Checks & Balances: Your Guide to County Finances, the Popular Annual Financial Report (PAFR)***

Under the leadership of Clerk Bock, the county's first-ever Popular Annual Financial Report (PAFR) was published in April, 2007, marking the beginning of a significant improvement in the reporting of county finances. A condensed version of the Comprehensive Annual Financial Report, The PAFR is intended to provide complex financial information in a user-friendly, easy-to-digest format. Intended for all residents, the brief guide is available in printed and online versions and covers important topics like property tax bills, how Palm Beach County government funds are managed and spent, and some fun facts. The inaugural publication of the PAFR received the Certificate of Achievement for Excellence for Popular Annual Financial Reporting from the Government Finance Officer's Association. The PAFR is published each year to promote accountability and transparency in government.

**i. *Your Public Trustee: Safeguarding Public Records and Public Funds***

This E-publication provides one convenient source of news on county finances, the court system and public records. The content is based on requests and input of subscribers as well as issues in the community.

#### **j. Clerk & Comptroller Volunteer Program**

Volunteers add much-needed support to our departments and enhance the quality of services provided to the public. Clerk & Comptroller volunteers work alongside our employees, providing information and assistance to the public. Qualified volunteers may also provide specialized assistance in the areas of finance, human resources, communications, and technology. This program provides opportunities for the public to engage in government by contributing their time and talent to support the community.

#### **k. Clerk Alerts**

The Clerk & Comptroller issues bulletins of community interest as the need arises. Bulletin topics have included: Protecting You from Identity Theft; Avoid Paying Excess Fees for Copies; Protecting Your Public Dollars & the Clerk's Role as County Auditor; and Let the Sun Shine – Insist on Transparency. These bulletins provide valuable information and are published on the Clerk's Web site and distributed to newsletter subscribers.

#### **l. Speaker's Bureau**

The Clerk & Comptroller and her staff enjoy having the opportunity to speak to civic and professional organizations in an effort to constantly engage with the people of the county and provide valuable information on topics in the public interest. Identity theft, county finances and the court system are just a few of the many topics that audiences have found to be valuable.

#### **m. Community Events**

Participation in various community events is a responsibility that has been embraced at the Clerk & Comptroller's office as a means of enhancing the public's knowledge of services provided by the office. The Wacky Water Station at the Marathon of the Palm Beaches is an annual event organized and choreographed by Clerk & Comptroller staff. Staff members also participate in the Race for the Cure, the Heart Walk and the South Florida Fair. Information on office services is distributed from the office's booth at community events such as the Senior Activities Festival and Pride Fest.

#### **n. Junior Achievement**

Junior Achievement educates and inspires young people to value the American free-enterprise system, entrepreneurship, understand business and economics and to be workforce ready. The Clerk & Comptroller supports Junior Achievement of the Palm Beaches, Inc. in its goal of ensuring that more than 90,000 county children will have a fundamental understanding of the free enterprise system by the 2007/08 school-year. Employees volunteer as teachers every year.

**7. Listen to and Learn from Stakeholders:** Commitment to timely, clear, honest and respectful dialogue with all stakeholders (the judiciary, members of the Bar, local

residents, government agencies, elected officials, etc.) that clearly articulates the mission and objectives of the office and solicits feedback via on-site, online and telephone surveys. Survey results and feedback are used to identify priorities for the office's strategic plan.

**8. Invest in Our Employees:** Commitment to ensuring that employees:

- Have the flexibility to allow them a healthy work/life balance;
- Are treated fairly and with dignity;
- Have access to health and wellness programs, and a variety of benefits to suit their individual needs;
- Receive respectful consideration for their goals and aspirations;
- Have opportunities for professional growth and development;
- Work in an emotionally and physically healthy environment.

We are committed to providing equal opportunity in all aspects of employment and will not engage in or tolerate unlawful workplace conduct, including discrimination, intimidation, or harassment. The following are in support of these principles:

- Drug Free Workplace Programs
- Equal Employment Opportunity Policy
- Veterans Preference Policy
- Mandatory Annual Training:
  - Ethics & the Public Trust
  - Anti-Harassment
  - Diversity
  - Safety and Violence in the Workplace

The following are components of the office's commitment to providing employees with a positive workplace experience:

*Note: Some programs are currently suspended due to severe legislative budget cuts.*

**a. Employee Opinion Survey:** The Clerk & Comptroller administers an employee survey through the Great Place to Work Institute®(GPTW). GPTW publishes the yearly list of "100 Best Companies to Work For" in *Fortune* magazine. Results of the survey are used to make improvements throughout the Clerk's office based on employee feedback, enable the office to benchmark against the country's best companies, and identify priorities for the office's strategic plan.

**b. People Achieving Top Health (P.A.T.H):** The emotional and physical health of our employees is a top priority. PATH initiatives are spread throughout the year, including:

- PATH to Health Fair includes medical information from local health providers and free screenings for breast cancer, cholesterol, blood pressure, carotid artery disease and others;
- Employee Assistance Program (EAP) provides employees with free, confidential assistance with work and personal issues;
- Free flu shots;
- Employer Deposit in Flexible Spending Account is dependent upon the performance of the office's self-insured plan and provides medical reimbursement opportunities beyond basic health insurance;
- Free health coverage for employee-only participants;
- Financial Health workshops;
- American Heart Association Heart Walk;
- Susan G. Komen Race for the Cure;

**c. Professional Growth & Development:** The office provides a variety of internal and external training offerings that are responsive to current trends, organizational priorities and employee needs assessments.

**d. Tuition Reimbursement:** As funding permits, the office provides partial reimbursement of tuition expenses for college courses as well as pay increases for degrees and certifications earned during employment.

**e. Professional Associations:** As funding permits, the office supports employee membership in professional organizations to expand opportunities for benchmarking best practices.

**f. Leadership Development:** The office places a high priority on the development of its leaders to ensure they can effectively support employees and organizational initiatives. Each year, one director or chief officer is enrolled in Leadership Palm Beach County.

**g. Employee Activities:** The Clerk & Comptroller is committed to providing employees with opportunities to build relationships outside the office. An Events & Activities Specialist coordinates events throughout the year with a focus on the needs of all demographics. Events include:

- Take our Daughters and Sons to Work Day
- Scholastic Book Fair
- Peanut Island Picnic
- Family Day Matinee
- Clerk Idol
- Dog Days of Summer Pet Celebration
- Dinner Dance
- Roller Skating
- Bowling
- Children's Holiday Show

**h. Benefits:** The office is proud of its benefits offerings, including:

- Health, Dental, Life, Disability, Supplemental (AFLAC) Insurance;
- Domestic Partner Coverage;
- Free Vision Coverage;
- Pre-Paid Legal and Identity Theft Insurance;
- Florida Retirement Plan (non-contributory)
- Deferred Compensation (pre-tax)
- Flexible Medical Spending Accounts
- Pet Insurance

**i. Performance-Based Pay Increases:** As funding permits, twice-yearly performance reviews are conducted and employees receive percentage pay increases based upon performance review score.

**j. Support for Parental Responsibilities:** Parents receive administrative leave to attend parent/teacher conferences throughout the school year.

**j. Leave Donation Program:** The allows employees to assist a fellow employee during medical crises by donating accrued vacation leave so that the receiving employee may continue to be paid by the Clerk & Comptroller's Office.

**9. Our Beliefs:** Our employees created our mission, vision and values as an expression of our shared beliefs and commitments. They are applied to all aspects of our operations and our community. We believe that:

- Good citizenship extends beyond individual actions to the governments and businesses in our community;
- We recognize that employee engagement and enthusiasm are contagious, and that they can be leveraged to enable government to make a positive contribution to the community;
- It is only through partnerships between businesses, governments and individuals that we can truly make Palm Beach County a great place to live and work.

## OUR FUTURE

We believe that as this policy matures and its impact on the community is observed and measured, it will be considered a best practice for world-class government social responsibility.



SHARON R. BOCK  
Clerk & Comptroller

*Rev. April 1, 2009*



DATE