

# VENTURA COUNTY CONSOLIDATED OVERSIGHT BOARD

*Board Letter Standards and SIRE Manual  
Version 2.0*



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## 1.0 INTRODUCTION

The Ventura County Consolidated Oversight Board (VCCOB) meetings are conducted in accordance with the Ralph M. Brown Act (Brown Act). The purpose of the Brown Act is to aid in the conduct of the People's Business by providing the public access, understanding, participation and transparency of the VCCOB's actions.

Regularly scheduled VCCOB meetings are convened every fourth Wednesday of each month (with the exception of August, November and December) at 9:30 a.m. in the County Government Center, Hall of Administration, Board of Supervisors Hearing Room. Special meetings are convened whenever necessary.

The County of Ventura Clerk of the Board's Office publicly lists requests submitted for consideration to the VCCOB on a monthly agenda.

Board letters submitted for placement on the VCCOB meeting agendas are submitted electronically (other than documents requiring the Chair's signature) through the Agenda Management System within SIRE. Each board letter is to include a list of specific recommendations that the VCCOB is being asked to consider/approve with explanation/justification for each recommendation.

Finalized agenda items must be uploaded into SIRE before **noon** on the **Wednesday** prior to the VCCOB meeting date, to allow sufficient time for the VCCOB Administrator (Administrator) to review and give final approval for placement on the agenda.

This document contains standards and procedures that must be followed to ensure the timely processing and approval of board letter submissions, in compliance with County rules, state laws and the Dissolution Act.

## 2.0 PROCESS/DEADLINES

All items appearing on the Ventura County Consolidated Oversight Board (VCCOB) agenda must be uploaded to SIRE (with complete supporting documentation) a minimum of 20 calendar days prior to the proposed board meeting date, which initiates the required **15-Day Review Period** (Late submissions are likely to be scheduled for the following meeting date to allow for a full review period).

The 15-day review period gives the Administrator and VCCOB Counsel sufficient time to review each item and provide any necessary input or direction. During the review period, the Administrator and/or VCCOB Counsel may request additional information/documentation and/or changes in the items submitted for consideration. Failure to timely respond will result in exclusion of the item from the agenda.

Following the 15-day review period, the Successor Agency finalizes the board item materials and uploads them to SIRE for the Administrator's final review/approval and recommendation for inclusion on the agenda. Once approved, the SIRE system sends an email to the submitting Successor Agency confirming approval and posting of the item to the agenda.

The SIRE item below has received final XXX's office approval and has been posted to the X/XX/2018 Ventura County Consolidated Oversight Board Agenda.

**Item ID:** XXXXX

**Status:** Approved and Posted to the Agenda.

**Subject:** Approval of ....

The Clerk of the Board immediately begins processing the agenda for electronic publication. The agenda is compiled on the **Thursday** prior to the scheduled VCCOB meeting and published on the **Friday** prior to the scheduled VCCOB meeting.

## 15-DAY REVIEW PERIOD

<p><b>Day 1 (Thursday):</b></p>	<p><b>SUBMISSION DEADLINE</b></p> <p><i>Note: Late submissions will automatically route to the VCCOB Administrator, who will then determine whether the Board Item may be submitted for review or returned to the Successor Agency who must then contact the Clerk of the Board's Office to request the Board Item's placement on a subsequent meeting agenda.</i></p>
<p><b>Day 2 - Day 13</b></p>	<p><b>REVIEW PERIOD</b></p> <p><i>Note: Board Items will automatically route back to the Successor Agency Gatekeepers once review of the Items is completed.</i></p>
<p><b>Day 14 (Tuesday):</b> <b>Day 15 (Wednesday):</b></p>	<p><b>FINAL SUBMISSION</b></p> <p><i>Note: The Successor Agency must upload the signed Board Letter and any Attachments into SIRE and submit to Administrator NO LATER THAN 12:00 P.M. on Wednesday.</i></p>

## CALENDAR OF THE 15-DAY REVIEW PERIOD

SUN	MON	TUE	WED	THU	FRI	SAT
				29	30	31
			PREVIOUS MONTH	SUBMISSION DEADLINE DAY 1	REVIEW DAY 2	
1 MONTH MEETING IS HELD	2 REVIEW DAY 3	3 REVIEW DAY 4	4 REVIEW DAY 5	5 REVIEW DAY 6	6 REVIEW DAY 7	7
8	9 REVIEW DAY 8	10 REVIEW DAY 9	11 REVIEW DAY 10	12 REVIEW DAY 11	13 REVIEW DAY 12	14
15	16 REVIEW DAY 13	17 GATEKEEPER FINALIZES MATERIALS DAY 14	18 FINAL SUBMISSION DEADLINE DAY 15	19 AGENDA FINALIZED	20 AGENDA PUBLISHED	21
22	23	24	25 ***** VCCOB MEETING *****	26	27	28
29	30	31				

## 3.0 BOARD LETTER STANDARDS AND SUBJECT TITLES

Successor Agencies are responsible for preparing board letters, resolutions, related staff reports and supporting documentation reasonably necessary for all actions recommended to the VCCOB.

Per Health and Safety Code section 34179(e), all actions taken by the Oversight Board shall be adopted by a resolution. Please provide the resolutions as attachments within SIRE. A sample Resolution Template is provided in the Board Letter Template section.

### 3.1 TEMPLATES

Successor Agencies must use the Board Letter and Resolution templates available on the VCCOB website at:

[www.ventura.org/cob/vccob-staff-materials](http://www.ventura.org/cob/vccob-staff-materials)

### 3.2 FORMAT

All board letters must be typed in Arial 12-point font, justified, presented on Successor Agency official letterhead, and signed by the Successor Agency's authorized representative.

Each board letter is to include the following sections:

- Subject – Brief general description of the item of business to be transacted or discussed
- Recommendation – Specific actions that the board is being requested to take (enumerated)
- Impact on Taxing Entities – Narrative of fiscal impact on taxing entities
- Discussion – Provide sufficient explanation and historical background along with justification for each recommended action
- Signature Block – Successor Agency's authorized representative
- Attachments (if applicable) – List all attachments and exhibits. If multiple attachments or exhibits are included, each one must be identified either by description, number, or letter.

### 3.3 SUBJECT TITLES

The Item Subject entered in SIRE must contain the following information when requesting or recommending formal action by the VCCOB:

- Subject lines **MUST** start with the wording "Approval of", "Ratification of", "Adoption of", "Authorization for", "Acceptance of", "Receive and File", "Public Hearing Regarding", "Second Hearing Regarding", "Report Back Regarding", or a combination of any of these items. Resolutions **MUST** start with "Adoption of". Note: the VCCOB adopts Resolutions, they do not approve them.
- Subject titles **MUST** contain a brief general description of *who, what, why, when, and where* in each recommendation requesting action by the VCCOB.
- Subject titles **MUST** incorporate all referenced recommended actions being requested.
- Subject lines are to be typed in **Upper and Lower Case**. Do **not** use all CAPS.
- Acronyms can be used to abbreviate frequently referenced and/or long names of departments, agencies, organizations, and terms as long as the full definition was used at least once in the board letter the first time the acronym is used. *Examples:* Ventura County Consolidated Oversight Board (VCCOB), County Executive Office (CEO), Environmental Impact Report (EIR).

*Example of Subject Titles:*

Receive and File a Report Regarding... (Report Subject);

Adopt a Resolution Regarding... (Subject)

The title **MUST NOT** indicate that anything is on file with the Clerk of the Board. All documents **MUST** be uploaded into SIRE.

### 3.4 RECOMMENDATIONS

Successor Agencies requesting formal action by the VCCOB must list each recommendation for each item. If there is more than one recommended action for an agenda item, each recommendation is to be stated.

The recommendation must clearly specify each action that the VCCOB is being requested to take.

If there are multiple recommendations, each recommendation must be numbered and presented in logical order of approval.

*Reminder: Resolutions are adopted by the VCCOB. The board letter's recommendation and subject title must request action by the VCCOB to **adopt** (not to approve) the Resolution.*



### 3.5 ATTACHMENTS

All attachments associated with the agenda item **MUST** be uploaded in SIRE; numbered and in the order listed below. Each uploaded document and file title must reflect the naming conventions below:

Board Letter

Attachment 1 – Resolution – Brief Description (e.g., Resolution of Intention)

Attachment 2 – Brief Description (e.g., Map of Site)

Attachment 3 – Brief Description (e.g., Legal Description of Property)

Attachment 4 – Brief Description (e.g., Contract for Services)

Attachment 5 – Service Area Map

### 3.6 BOARD LETTER TEMPLATE

**Use Successor Agency Letterhead**

<<Meeting Date>>

Ventura County Consolidated Oversight Board  
County of Ventura  
800 South Victoria Avenue  
Ventura, CA 93009

**Subject:** <<Subject Title Meeting the Requirements Stated Above.>>

**Recommendation:**

<<Specific actions (enumerated) that the Board is being requested to take, meeting the requirements stated above.>>

**Impact on Taxing Entities:**

<<Narrative of fiscal impact on taxing entities.>>

**Discussion:**

<<Provide sufficient explanation and historical background (if any) along with justification for each recommended action.>>

Should you have any questions regarding this item or require additional information, please contact <<Name>> at <<phone number>>.

Sincerely,

<<Signature>>

<<Name>>

<<Title>>

Attachments (if any):

Attachment 1 - <<List all attachments>>



### 3.7 RESOLUTION TEMPLATE

Resolution No. (Leave Blank)

**RESOLUTION OF THE VENTURA COUNTY CONSOLIDATED OVERSIGHT BOARD**  
**<<RESOLUTION TITLE>>**

The Ventura County Consolidated Oversight Board ("VCCOB") does resolve as follows:

**WHEREAS**, Health and Safety Code section 34179 (j) creates a single countywide oversight board effective July 1, 2018 for each county with successor agencies remaining;

**WHEREAS**, the Ventura County Consolidated Oversight Board (VCCOB) has been established in accordance with Health & Safety Code sections 34179(j) to approve certain successor agency actions pursuant to Health & Safety Code 34180 and to direct the successor agencies in certain other actions pursuant to Health & Safety Code section 34181; and

**WHEREAS**, << resolution information>>

**WHEREAS**, << resolution information>>

**NOW, THEREFORE, BE IT FOUND AND RESOLVED AS FOLLOWS:**

1. The above recitations are true and correct.
2. <<insert text>>

**PASSED, APPROVED AND ADOPTED** by the Ventura County Consolidated Oversight Board upon motion of Board Member \_\_\_\_\_, seconded by Board Member \_\_\_\_\_, and duly carried on this <<Date>> day of <<Month>>, <<Year>>.

By \_\_\_\_\_  
Chair, Ventura County Consolidated Oversight Board

ATTEST:  
Clerk of the Ventura County Consolidated Oversight Board

By: \_\_\_\_\_  
Deputy Clerk of the Board

### 4.0 REVISIONS, AMENDMENTS AND CORRECTIONS

Successor Agencies revising, amending or correcting a board letter or attachment after the agenda has been posted **MUST** contact the Administrator to obtain approval for changes. Changes must be substantial in nature (not typos).

If approved, the Administrator will notify the Clerk of the Board's Office of the specific change(s). Revisions, amendments, and corrections are due to the Clerk of the Board of Supervisors by **noon on the Monday preceding the VCCOB meeting**.

Successor Agencies **MUST** provide the following revision packet containing two (2) PDFs to the Clerk of the Board:

**1. FORMAL REVISION PACKET FOR DISTRIBUTION TO THE VCCOB  
(1<sup>st</sup> PDF CONTAINS 3 ITEMS)**

- Successor Agency memorandum addressed to “Clerk of the Board of Supervisors and Ventura County Consolidated Oversight Board Agenda Distribution” indicating the meeting date, agenda item number, and a brief explanation of why the document is being changed,
- Red-lined (strike out) of the revised page(s) only, and
- Clean copy of the revised page(s) only.

**2. SIRE REPLACEMENT FILES (2<sup>nd</sup> PDF)**

- Clean copy of the entire corrected document (board letter and/or attachment).

Email the revision packet (i.e., both PDF files) to Jessica Kam ([jessica.kam@ventura.org](mailto:jessica.kam@ventura.org)) and [clerkoftheboard@ventura.org](mailto:clerkoftheboard@ventura.org).

If the error is discovered on the day of the VCCOB meeting, **Successor Agencies must bring 15 paper copies of the revision packet to the boardroom prior to the VCCOB taking action on the item.** The revision packet should include the following:

- Successor Agency memorandum addressed to “Clerk of the Board of Supervisors and Ventura County Consolidated Oversight Board Agenda Distribution”, indicating the meeting date, agenda item number, and a brief explanation of why the document is being changed,
- Red-lined (strike out) of the revised page(s) only, and
- Clean copy of the revised page(s) only.

Email a clean copy of the revised document to Jessica Kam ([jessica.kam@ventura.org](mailto:jessica.kam@ventura.org)) and [clerkoftheboard@ventura.org](mailto:clerkoftheboard@ventura.org).

## 5.0 LEGAL REVIEW, NOTICES AND REQUIREMENTS

### 5.1 LEGAL REVIEW

Each respective Successor Agency’s Legal Counsel is responsible for providing legal opinions and advice, and assisting with content preparation of board letters and resolutions. VCCOB Counsel will have final review of all items for compliance and consistency with laws and the Dissolution Act.

## 5.2 LEGAL NOTICES OR MAILINGS

Successor Agencies required to provide a Legal Notice for a Public Hearing, or any other reason, by Publication of Notice in a newspaper of general circulation are required to prepare the Notice of Public Hearing and must work with the appropriate City Council to determine the Publication Notice requirements (i.e., 10, 15 or 30-Day Notice, publish once or twice in a particular circulation, etc.).

Prior to setting a Public Hearing or placing the agenda item within SIRE, the Successor Agency must request placement on the VCCOB Agenda via email to [clerkoftheboard@ventura.org](mailto:clerkoftheboard@ventura.org).

The Proof of Order or Proof of Publication must be uploaded as a CONFIDENTIAL document as part of the Agenda Item in SIRE (See Section 9.5).

**If the Proof of Order is not filed on time per the legal requirements, the Public Hearing will be postponed to another date, and the Successor Agency is responsible for re-noticing the Public Hearing.**

## 6.0 BOARD MEETING

### 6.1 BOARD LETTER PRESENTATION

Successor Agencies must have a representative at the VCCOB meeting to present their board item(s) and respond to questions as related. Representatives should first state their name for the record and address the Chair and VCCOB Members. Presentations should not exceed five minutes unless pre-approved by the Administrator.

*Note: A PowerPoint presentation is not a requirement.*

### 6.2 ELECTRONIC PRESENTATIONS

For agenda items that include electronic presentations such as PowerPoint, Successor Agencies **MUST** email the General Services Agency (GSA), boardroom media booth no later than noon of the Tuesday before the board meeting date.

The email must be sent to:

[BoardRoom.Presentation@ventura.org](mailto:BoardRoom.Presentation@ventura.org)  
[jessica.kam@ventura.org](mailto:jessica.kam@ventura.org)  
[robert.bravo@ventura.org](mailto:robert.bravo@ventura.org)

Include the following information in the email:

1. Subject: VCCOB Meeting <meeting date>
2. Agenda item number
3. Successor Agency name, name of presenter, and contact information

#### 4. Attach the presentation file titled with the agenda Item number

If a presentation was not already included in the originally published agenda files, or in a revision packet, please provide 15 paper copies to the Clerk of the Board's Office by 2 p.m. on Tuesday before the Wednesday board meeting date. Please print 1 - 4 slides per page, double-sided, in color and stapled. Additionally, if a presenter would like to submit a hard copy of any Attachment, please provide 15 paper copies to the Clerk of the Board's Office.

GSA provides the opportunity to test the presentations in the boardroom on Friday afternoons. Please email [ethan.edmonds@ventura.org](mailto:ethan.edmonds@ventura.org) and [larry.villa@ventura.org](mailto:larry.villa@ventura.org) in advance to schedule a practice run.

### 6.3 MINUTES/MINUTE ORDERS

Official Summary Minutes and Minute Orders for each VCCOB meeting are available online at:

[www.ventura.org/ceo/cob/vccob](http://www.ventura.org/ceo/cob/vccob)

Once the VCCOB approves the previous meetings' minutes, the Official Summary Minutes will be uploaded online in association with the meeting for which the minutes pertain.

Select the *Documents* dropdown menu to access the Minute Orders. Once you have located a desired Minute Order in the PDF, take the following steps to ensure you print only the minute order you desire:

1. Select/View the Minute Order
2. Select Print
3. Within the Print menu window, under Print Range, select current view and print.

### 7.0 CHAIR SIGNATURE

The Clerk of the Board will prepare one single-sided document submitted for the VCCOB Chair's APPROVAL and SIGNATURE to be maintained as part of the meeting record. Additional copies needed by the Successor Agency, must be submitted to the Clerk of the Board before the meeting is called to order.

Additional documents that need to be signed and returned to Successor Agency staff must be submitted to the Clerk of the Board with the Signature Required Transmittal form. The form must contain the agenda date, SIRE ID or agenda number, agenda title, contact information (in order to send the signed copies back to the Successor Agency staff), an indication as to whether these documents are priority (time sensitive) and/or whether certified copies are needed.

The Signature Required Transmittal form is available on the VCCOB website:

[www.ventura.org/cob/vccob-staff-materials](http://www.ventura.org/cob/vccob-staff-materials)

Documents requiring the VCCOB Chair's signature should reflect "Chair, Ventura County Consolidated Oversight Board". Signature blocks requiring the VCCOB Chair to sign must be on the right side of the documents; and signature blocks requiring for Clerk of the Board to "Attest" are to be on the left side of the documents. The Clerk of the Board only attests the VCCOB Chair's signature.

All signatories of the document should first sign the document prior to submitting it to the Clerk of the Board's Office for the VCCOB Chair's signature. The VCCOB Chair should be the last signatory on the document, however, there may be exceptions to this rule such as documents that include other government entities.

If the VCCOB Chair is not the last signatory, the Successor Agency must submit the fully executed document to the Clerk of the Board once all other signatures are obtained.

## 8.0 LOGGING INTO THE SIRE APPLICATION



**Figure 1. Logging In to SIRE**

**Before you begin** – You must have credentials to log in to SIRE. To obtain credentials to use SIRE, an authorized representative from each Successor Agency must email [CEO.ITSupport@ventura.org](mailto:CEO.ITSupport@ventura.org) to request a SIRE account creation.

### **Getting Started:**

Open Internet Explorer  (the preferred browser) and go to:

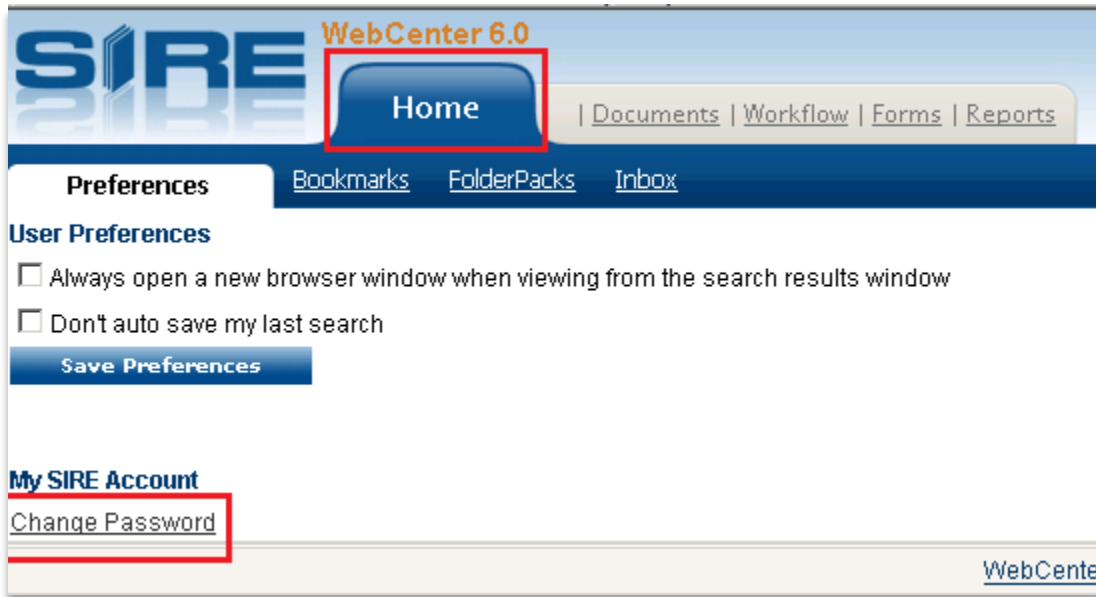
<http://bosagenda.countyofventura.org>

Your username will be the first six letters of your last name and the first letter of your first name.

**EXAMPLE:** if your name is **Jonathan Meyers**, your username will be **meyersj**

## 8.1 CHANGING YOUR PASSWORD

Once you have successfully logged into the SIRE application, you will be taken to your SIRE Web Center homepage.



**Figure 2. Preferences Tab**

To change your default password, click on the 'Change Password' link at the bottom of the preferences page. The password that you select does not expire.

The image shows a dialog box titled 'SIRE WebCenter Login:'. It features a yellow padlock icon on the left. Below the title are four input fields: 'Change Password', 'Password:', 'New Password:', and 'Confirm Password:'. At the bottom of the dialog box are two buttons: 'Change' and 'Cancel'.

**Figure 3. Changing Your Password**

Once your password is changed it will take you back to the Preferences screen where you can navigate back to your 'Home' page.

## 9.0 CREATING AN AGENDA ITEM

In order to start the process of creating an Agenda Item, you must submit an Electronic Form. Click on the Forms Tab to display the list of Forms that are available. The screen below will be displayed.

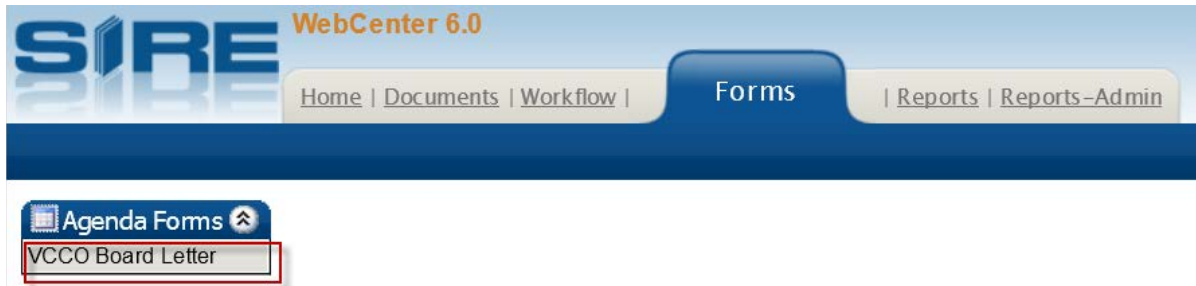


Figure 4. Forms Tab

The Form entitled “VCCO Board Letter” contains fields to capture information to start the workflow and to generate a formatted Board Letter.

Filling out the form is the start of the Board Letter process for each separate item. Once the form is submitted, the Originator has the ability to edit and add additional content to the Board Letter.

It is also possible to enter just the Subject of the Board Letter into the form, and then upload your own, completed, Board Letter (See Section 9.4).

## 9.1 SELECT MEETING TYPE, DATE, AND LOCATION

Once you have selected the appropriate Form, you will be prompted to select the Meeting Type, Meeting Date and suggested section of where item will be placed on the agenda, listed under Meeting Location.

The screenshot shows the SIRE WebCenter 6.0 interface with the 'Forms' tab selected. Below the navigation bar, there is a sub-menu titled 'Agenda Forms' with a downward-pointing arrow. To the right of this sub-menu, the text 'Select a location for your agenda item.' is displayed. Below this text, there are three dropdown menus: 'Meeting Type' with 'Consolidated Oversight Board' selected, 'Meeting Date' with '8/15/2019 9:30 AM' selected, and 'Meeting Location' with 'REGULAR AGENDA' selected. The 'Meeting Location' dropdown menu is currently open, showing the selected option.

Figure 5. Meeting Type, Date and Location



Currently, the only choice available for Meeting Type is the “Consolidated Oversight Board” meeting. This Meeting Type refers to the regularly scheduled Wednesday Board Meeting. The Meeting Date dates are populated by the Clerk of the Board.

The Meeting Location represents the placement on the Agenda. Please select ‘Regular Agenda’ when submitting an item.

## 9.2 COMPLETING THE FORM

The Forms are designed to create a Board Letter document based on the data that is collected in each of the fields. The Subject field is a REQUIRED field and is used throughout the entire SIRE process.

The Submitting Agency dropdown menu defaults to the Successor Agency you are associated with in your user profile.

The screenshot shows the SIRE WebCenter 6.0 interface. The main heading is "Consolidated Oversight Board Submittal Form". The form contains the following fields:

Board Letter Date:	8/15/2019
Submitting Agency:	City of Camarillo
Item Subject:	<div style="background-color: yellow; height: 100px;"></div>

At the bottom of the form are buttons for "Reset", "Check Spelling", and "Save & Continue >>".

Figure 6. Board Letter Submittal Form

When entering the Subject information, you must use an Upper and Lower-Case format.

The screenshot shows the SIRE WebCenter 6.0 interface with the "Agenda Item Files" section. It includes a "Start Form" button and a table of files:

#	*	File Description	R	C	Ext	Date Added	OCR	Full Text	PDF	Pages
1		Board Letter.doc			doc	01/28/2014				0

Figure 7. Agenda Item Files

From this page you can work with the Board Letter that has been generated by SIRE, and/or add attachments. See Section 9.3 for more information about Uploading Documents/Attachments.

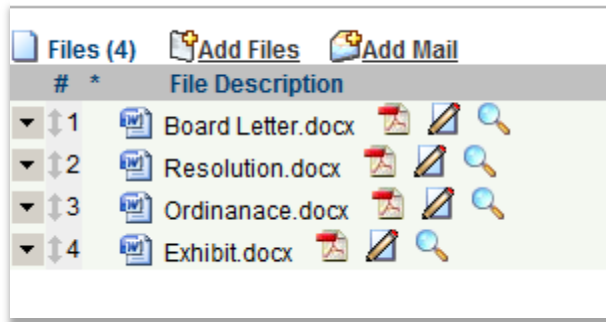
### 9.3 UPLOADING DOCUMENTS/ATTACHMENTS

All attachments associated with the Board Letter must be uploaded into SIRE before releasing the item to the Administrator.

Documents contained within SIRE must follow a specific order and naming convention. In addition to the specified name, please add a brief description of the document. For example, Attachment 1 – Map of County.doc (See Section 3.5).

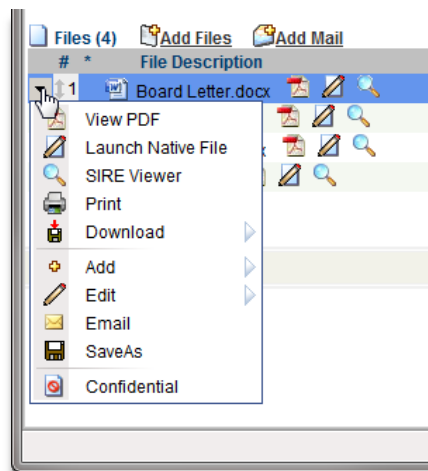
Figure 8, below, displays 4 files in the appropriate order. Note that each file has 3 icons to the right of the file name.

- The leftmost icon opens the file as a PDF document.
- The center icon opens the file in its “native” mode. Native mode means that the file will be opened in the application that it was created in. For example, a Microsoft Word file will be opened in Word.
- The rightmost icon opens the file using the SIRE viewer.



**Figure 8. Item Attachments (Files)**

Figure 9, below, displays additional options for each file in the list.

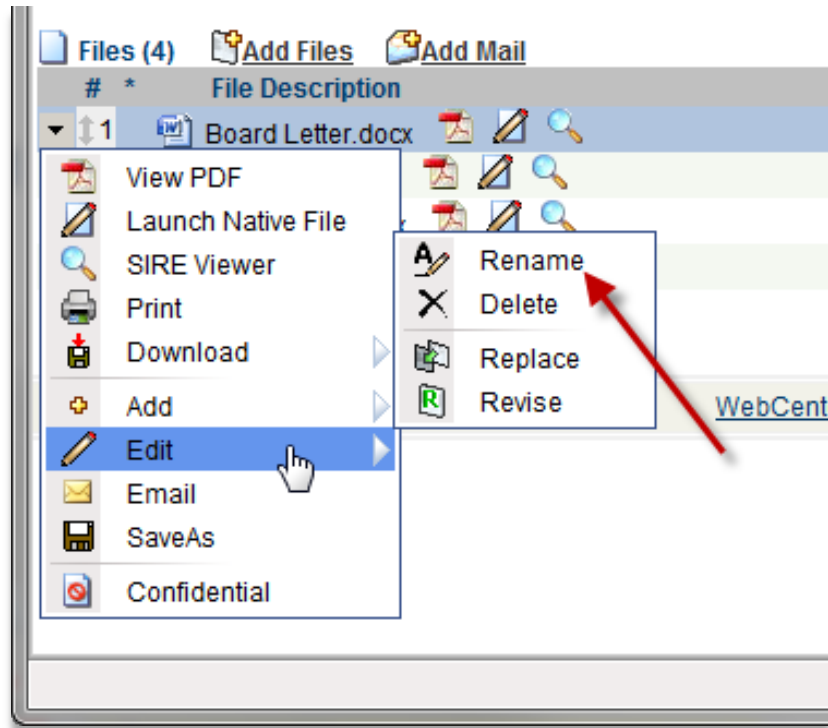


**Figure 9. Item Attachments (Files) Menu**

## 9.4 UPLOAD YOUR OWN BOARD LETTER DOCUMENT TO REPLACE SIRE GENERATED BOARD LETTER

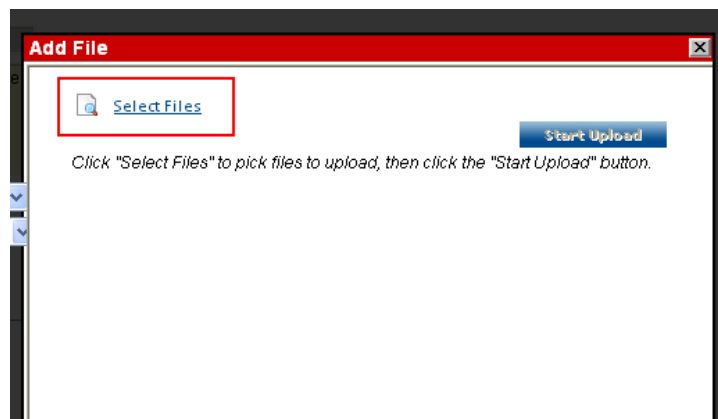
To use the Board Letter that you have already created in Word, follow these steps:

1. Click on Add Files, and then click on Select files to locate your saved Board Letter on your computer or network drive. Once you have located/selected your Board Letter, click Open on the dialog box.
2. Once the Board Letter has been selected, click on the "Start Upload" button.
3. Rename the attached file to "Board Letter" by clicking on the down arrow to the left of the file, and then click on Edit, and then select Rename. See Figure 10 below.



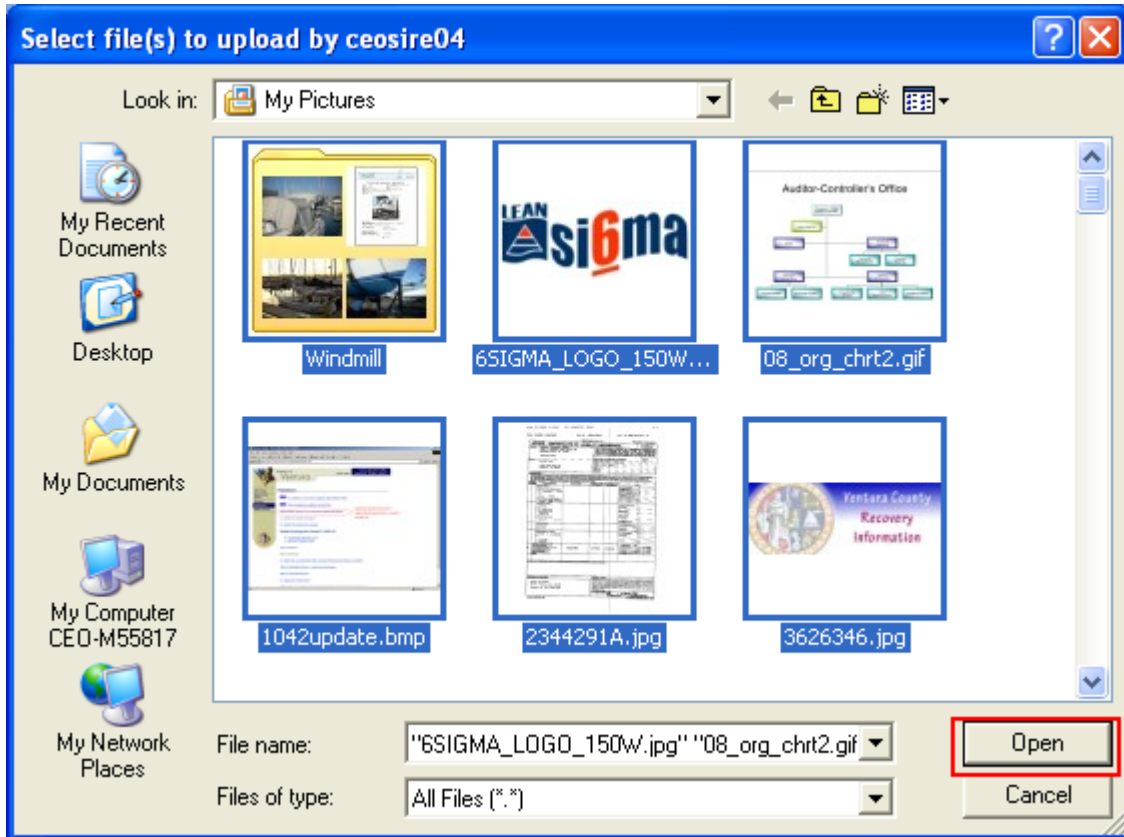
**Figure 10. Renaming Your Board Letter File**

If you have additional supporting material to add to the Agenda Item, click on Add Files, and then click on Select Files.



**Figure 11. Adding Additional Files**

Navigate to the desired location and select the file(s) you want to attach to the Agenda Item. You can select multiple files if needed. Click Open when the files have been selected.



**Figure 12. Selecting Multiple Files**

Then Click on the 'Start Upload' button to attach the file(s).

If you are finished uploading documents, see Section 11.0 to route your item.

Important: Ensure that you add files before deleting files. If you have added files, and then delete all the files, and then add more files; the new files will look like they have been added, but they won't be listed at the time that the Clerk of the Board processes the Agenda.

## 9.5 UPLOADING REDACTED AND NON-REDACTED DOCUMENTS

To submit Redacted documents, you need to create 2 separate documents (1 redacted and 1 unredacted). Upload both versions into SIRE.

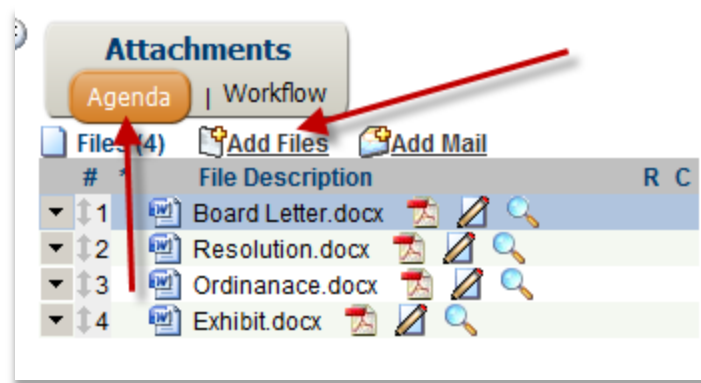


Figure 13. Uploading Redacted and Non-Redacted Files

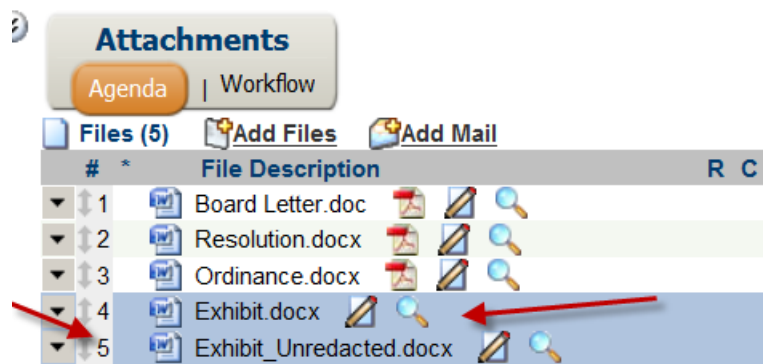
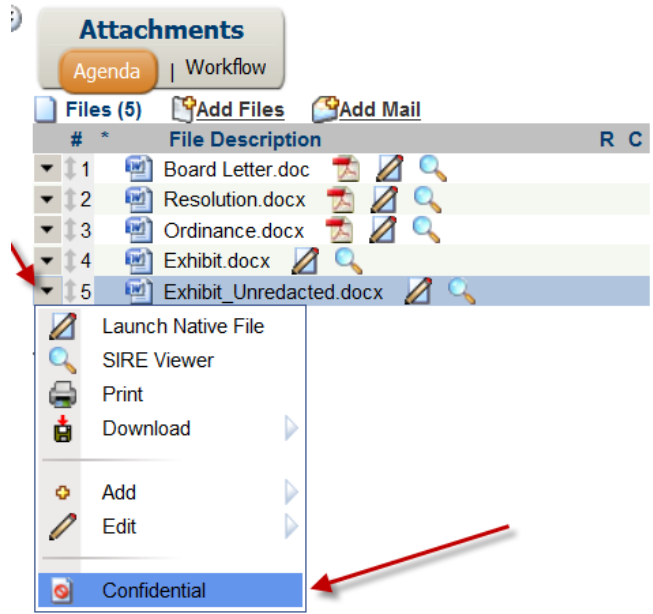


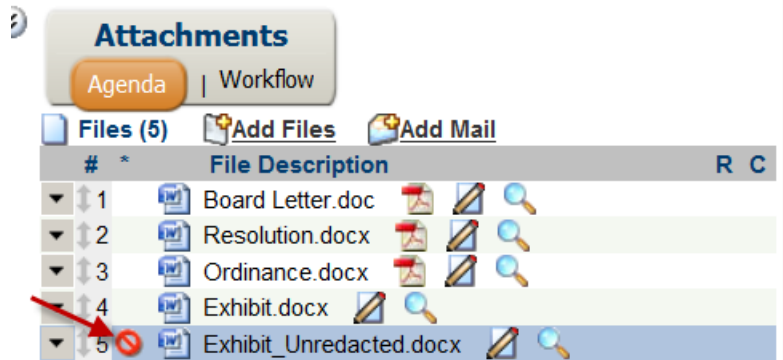
Figure 14. After Uploading Redacted and Non-Redacted Files

Set the unredacted document as **CONFIDENTIAL** by clicking on the black pull-down menu and selecting the option Confidential as shown in Figure 15.



**Figure 15. Marking the Files as Confidential**

All items added that are not marked CONFIDENTIAL will be published in their entirety to the Internet for public viewing.



**Figure 16. Showing the Files Marked as Confidential**

Any file that you upload can be uploaded in its native file format, such as Word, Excel, etc. Once the document has been published to the Internet, SIRE will convert it to a PDF for public viewing.

If you are finished uploading documents, see Section 11.0 to route your item.

## 10.0 WORKING WITH ATTACHMENTS IN SIRE – VIEWING AND MAKING CHANGES

Once a document has been added to SIRE it is possible to edit/revise the document within the SIRE application without having to re-upload a new copy.

There are two different methods to view a document within the SIRE application; both options are explained below.

### 10.1 SIRE TOOL MENU

Click on the Black Arrow to the left of each file to reveal the SIRE Tool Menu that is used to work with the Attachments. Below is a description of each Tool.

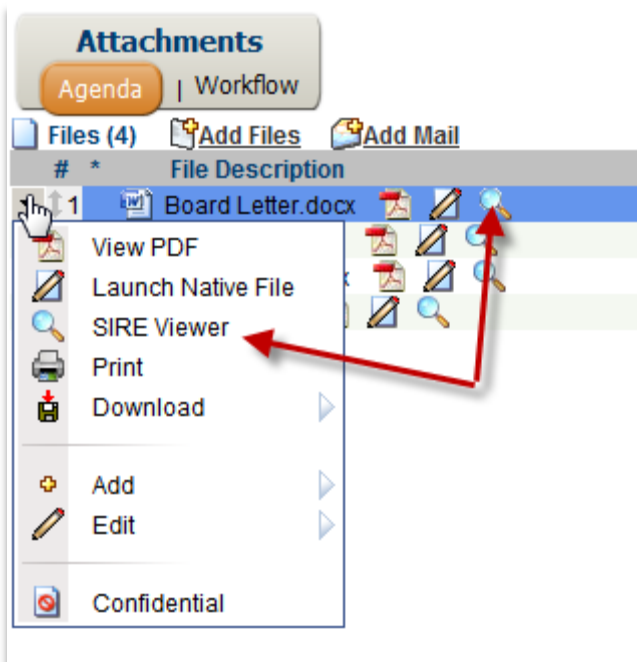


Figure 17. SIRE Viewer Menu Option

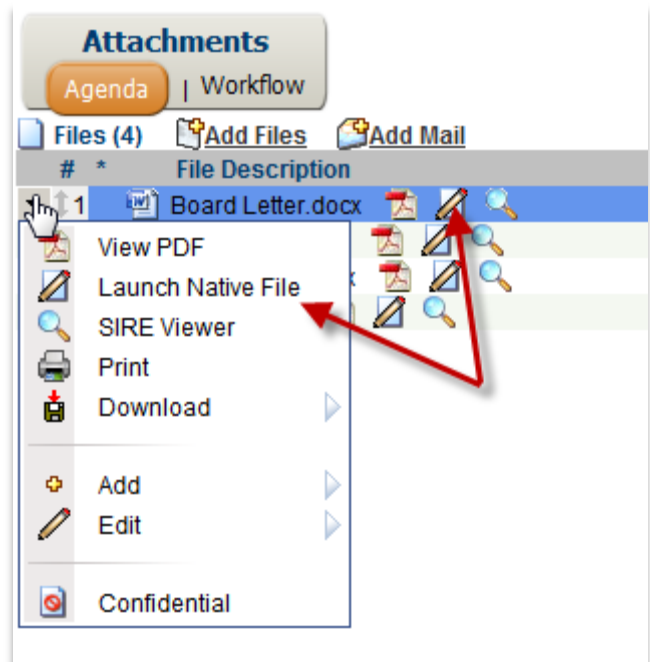


Figure 18. Launch Native Mode Menu Option

**SIRE VIEWER = READ ONLY - LAUNCH NATIVE FILE = EDIT**



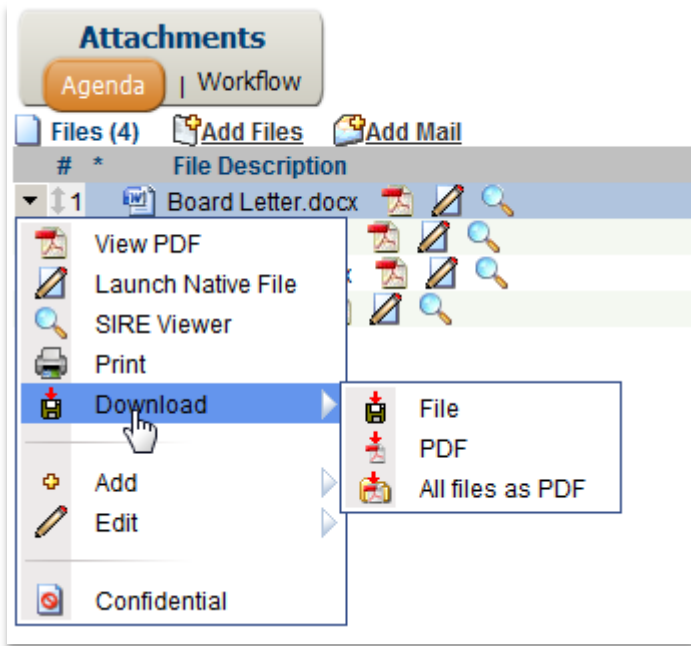


Figure 19. Downloading Attachments

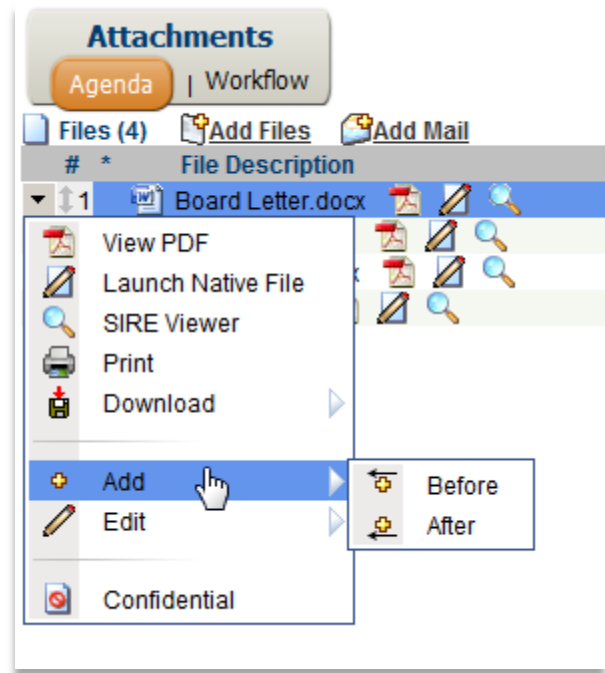


Figure 20. Adding Attachments

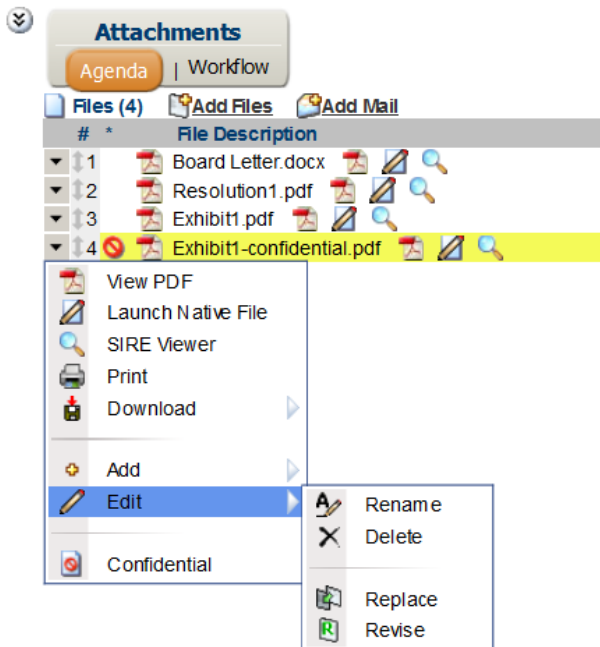


Figure 21. Editing Attachments

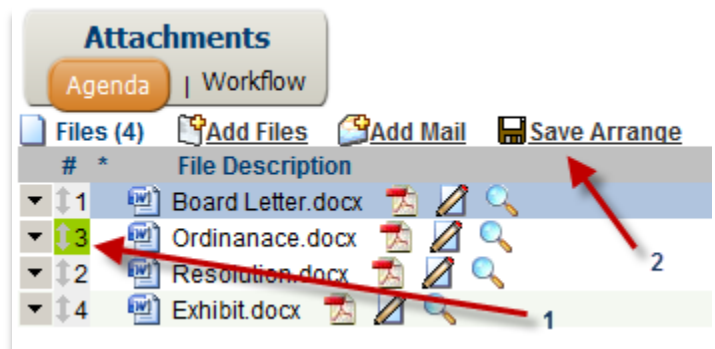





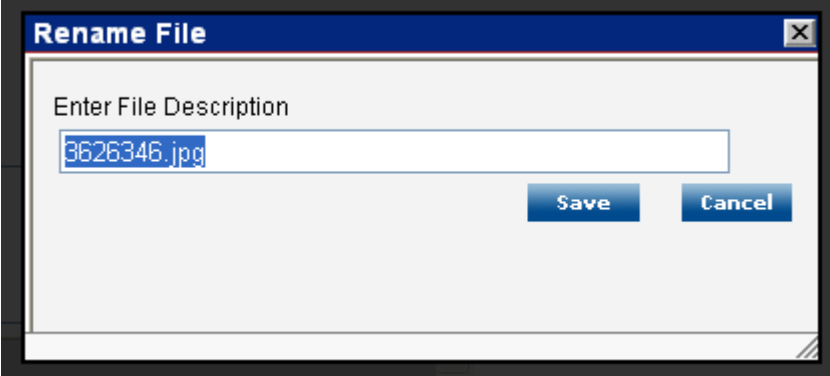




Figure 22. Re-ordering and Saving Attachment Arrangements

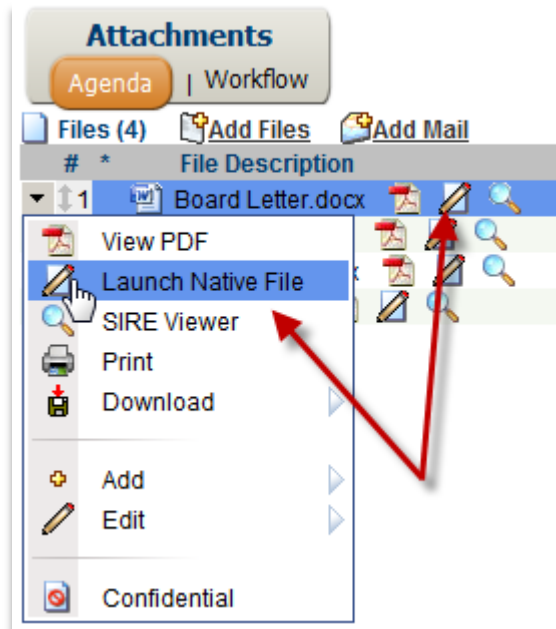
Icon	Usage
	SIRE Viewer – Clicking on the Magnifying Glass either from the drop-down menu or from the icon next to the document title opens SIRE’s Viewer. This is a quick way to open the document for read/review purposes. You may NOT edit the document using the SIRE Viewer (See Section 10.3).
	Launch Native File – Clicking on the Launch icon will launch the Native Application. For instance, if the file is .doc, then Word will open. Use this icon to Edit the document.
	Download Tool – This allows you to either Download a copy of an attachment or open it for viewing purposes only (no editing).
	Add Files – This Add feature allows you to add files before or after the file that you selected from the list of files.
	<p>Renaming Tool – This allows you to rename the attachments in SIRE.</p> <div data-bbox="505 653 1330 1026" data-label="Image">  </div> <p>Enter the new name of the attachment or edit the existing title</p>
	Deleting Tool – This allows you to delete attachments in SIRE.
	<p>Arrange Files – Clicking on the up/down arrow for the file that you want to re-order allows you to drag the file up or down to the correct position.</p> <p><b>BE SURE TO CLICK “SAVE ARRANGE” WHEN FINISHED OR THE ORDER WILL REVERT TO THE ORIGINAL SETTINGS.</b></p>

**Table 1. SIRE Editing Icon Legend**

## 10.2 EDITING/REVISING ATTACHMENTS USING NATIVE METHOD

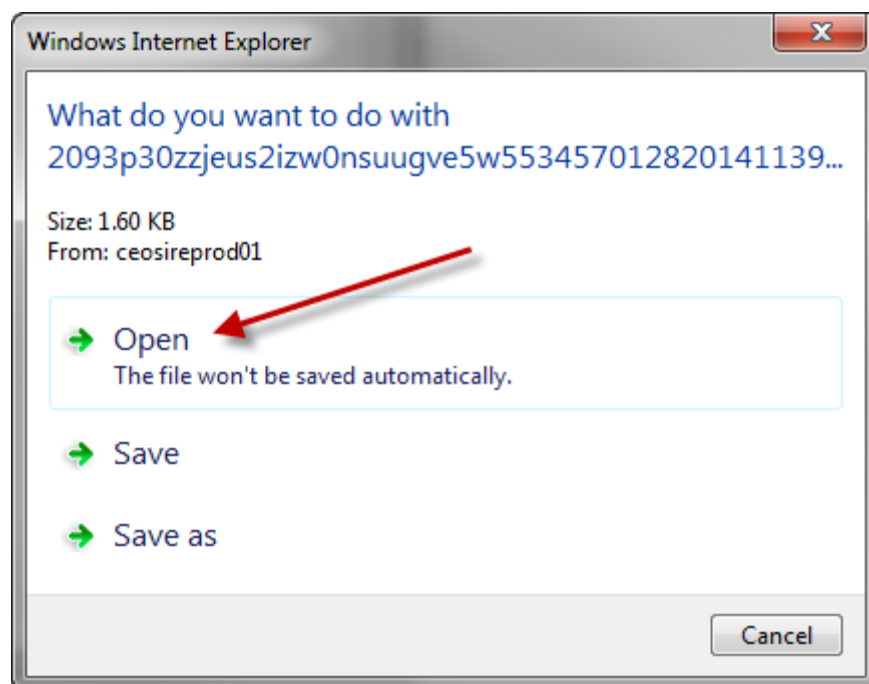
Using the Native Method allows you to open the document using the application that is associated with the attached file. For instance, using Word for a .doc and Excel for a .xls, etc.

To view an attachment in the native application, click on the Black Arrow (Board Letter.doc) to the left of the file name and then select Launch Native File. Alternatively, click the Launch Native File icon to the right of the desired attachment.



**Figure 23. Launching Files in Native Mode**

If you are prompted with the screen below (Figure 24), always click Open.



**Figure 24. Opening Files in Native Mode**

The Native Mode Launcher window (Figure 25) will now appear giving you the option to open the file in the Native Application (like Word, WordPerfect, etc.). The document will open automatically (Figure 26).

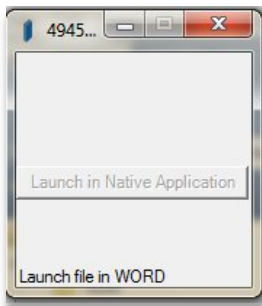


Figure 25. Native Mode Launcher

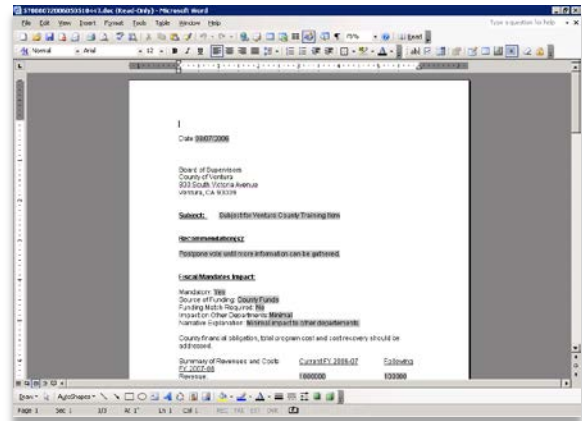


Figure 26. Attachment in Native Mode

After you have made your revisions, click on the Revise or Replace icons.

**Revise:** This will make your new document the primary document and archive the older one as a revised file. When choosing this option, you will still be able to view the older revision on the same page.

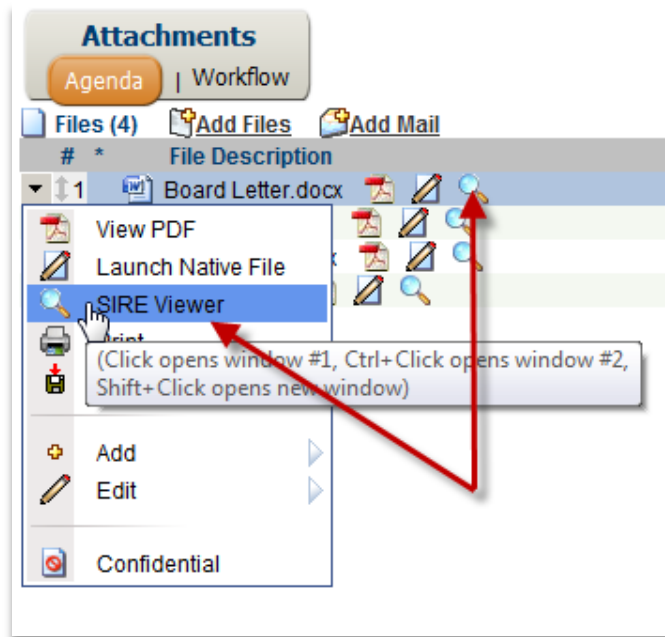
**Replace:** This will do just that, replace the current document with the one you just made changes to.

**ONCE THE ORIGINAL DOCUMENT HAS BEEN REPLACED, IT CANNOT BE RETRIEVED AGAIN FROM WITHIN THE SYSTEM.**

### 10.3 SIRE VIEWER – OPEN DOCUMENTS

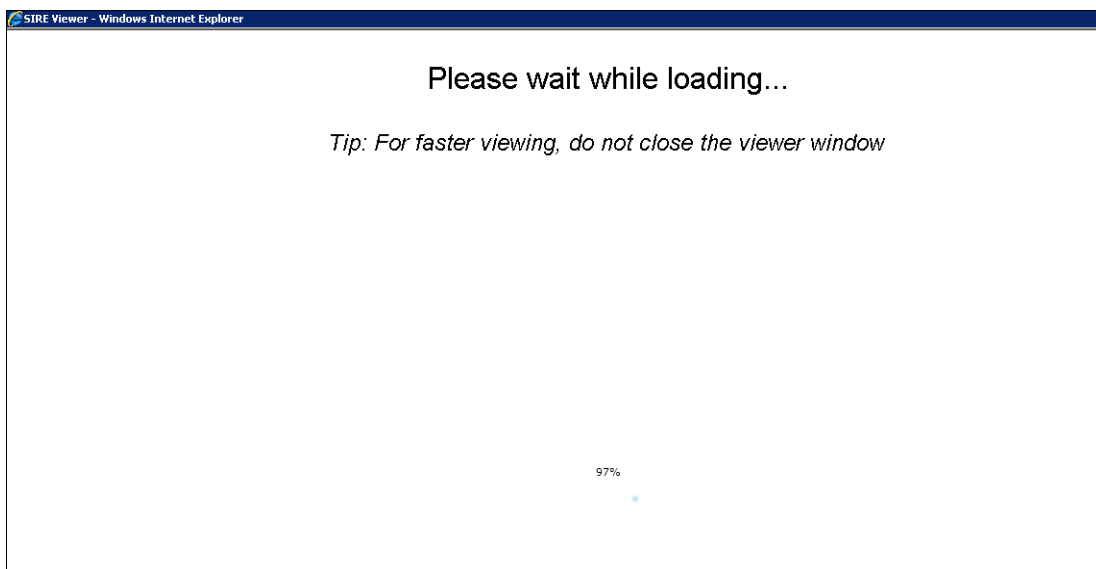
The SIRE Viewer can be used when the User does not have the Native Application that was used to generate the file installed on their computer, such as CAD Program. It can also be used to read a document without making any edits/changes.

Click on the Black Arrow to the left of the filename and select SIRE Viewer.



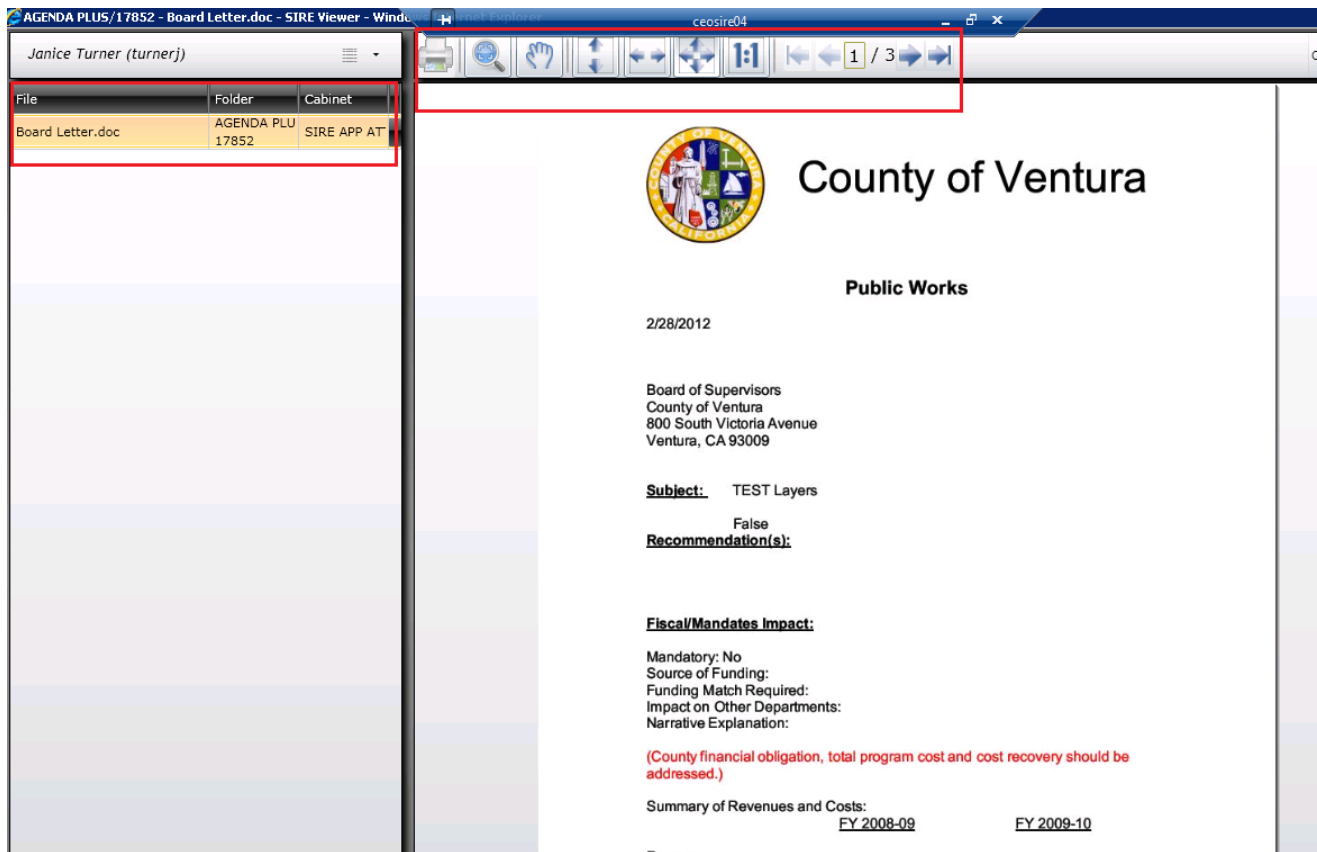
**Figure 27. SIRE Viewer Menu Options**

Once you have clicked on View, the page displayed in Figure 28 will appear while the document loads.



**Figure 28. SIRE Viewer Opening File**

Once the document loads, you will see the document on the screen as indicated in Figure 29.



**Figure 29. SIRE Viewer**

When you are finished reading the document you may click the X in the upper right-hand corner to close the window.

## 11.0 WORK QUEUE

At each step in the process that you are required to perform some action, the item will appear in your Workflow Work Queue. There are several points that this may occur, depending on your role in the process.

Successor Agency staff submitting Board Letters are assigned to one of two roles: Originator or Gatekeeper. Role assignment is at the discretion of the Successor Agency, who may choose to assign both roles to the same staff member.

The flow process for items to successfully make it onto the Agenda is as follows:

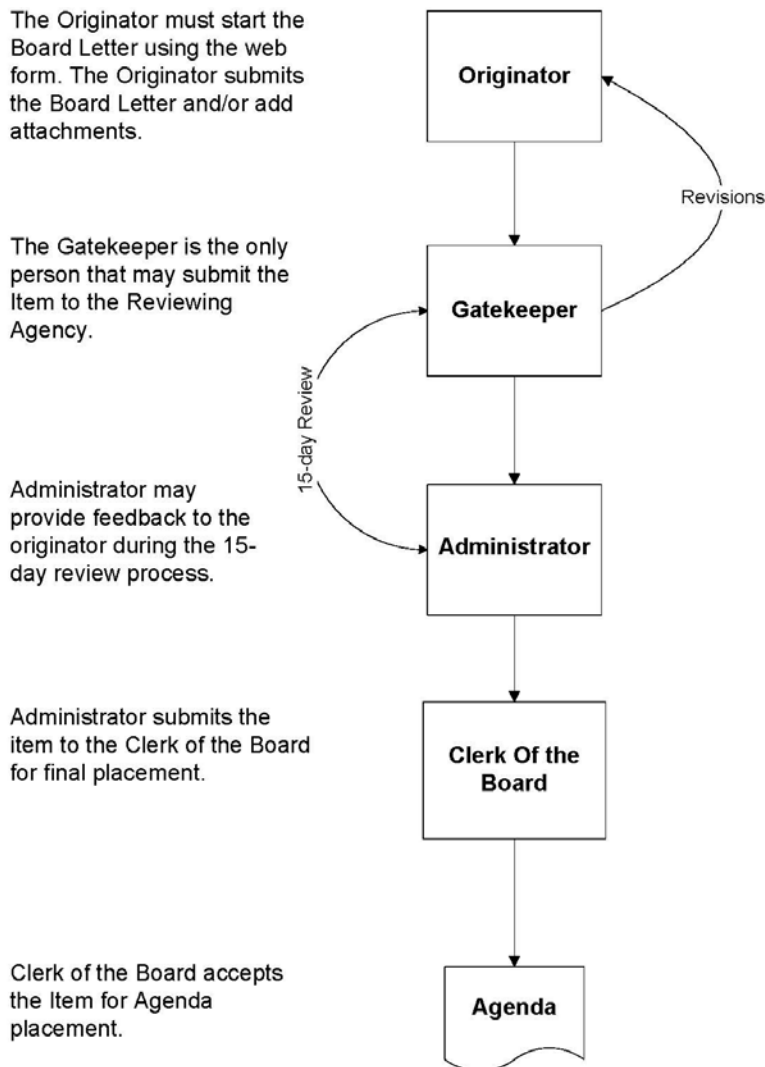
- Originator starts process by completing the form.
- Originator routes item to Gatekeeper for review.
- Gatekeeper releases item to Administrator.
- Administrator routes item to Clerk of the Board (COB) or returns item to Gatekeeper for corrections.
- Clerk of the Board (COB) approves the item for placement on the Agenda.

**All items in your Work Queue require immediate attention.**

Once the item has been routed to the next step in the process it is removed from your queue and is no longer accessible. The item will be returned to your queue when further action on your part is required.

E-Mail Notification – Each time an item is assigned to your Work Queue, you will receive an email alerting you to the arrival of the item in your queue. The item is then ready for processing in SIRE.

### Ventura County Consolidated Oversight Board Process Flowchart



**Figure 30. Workflow Email**



## 11.1 WORK QUEUE – ORIGINATOR – STEP 1

After completing the “Creating an Agenda Item” in Section 9.0, the person completing the step automatically becomes the Originator. Once the Form has been completed, the item is in the Originator’s Work Queue pending further processing as shown in Figure 31.

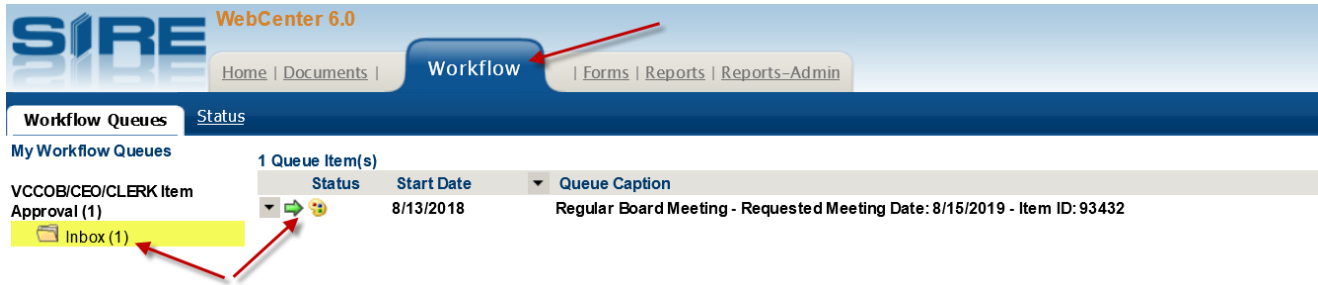
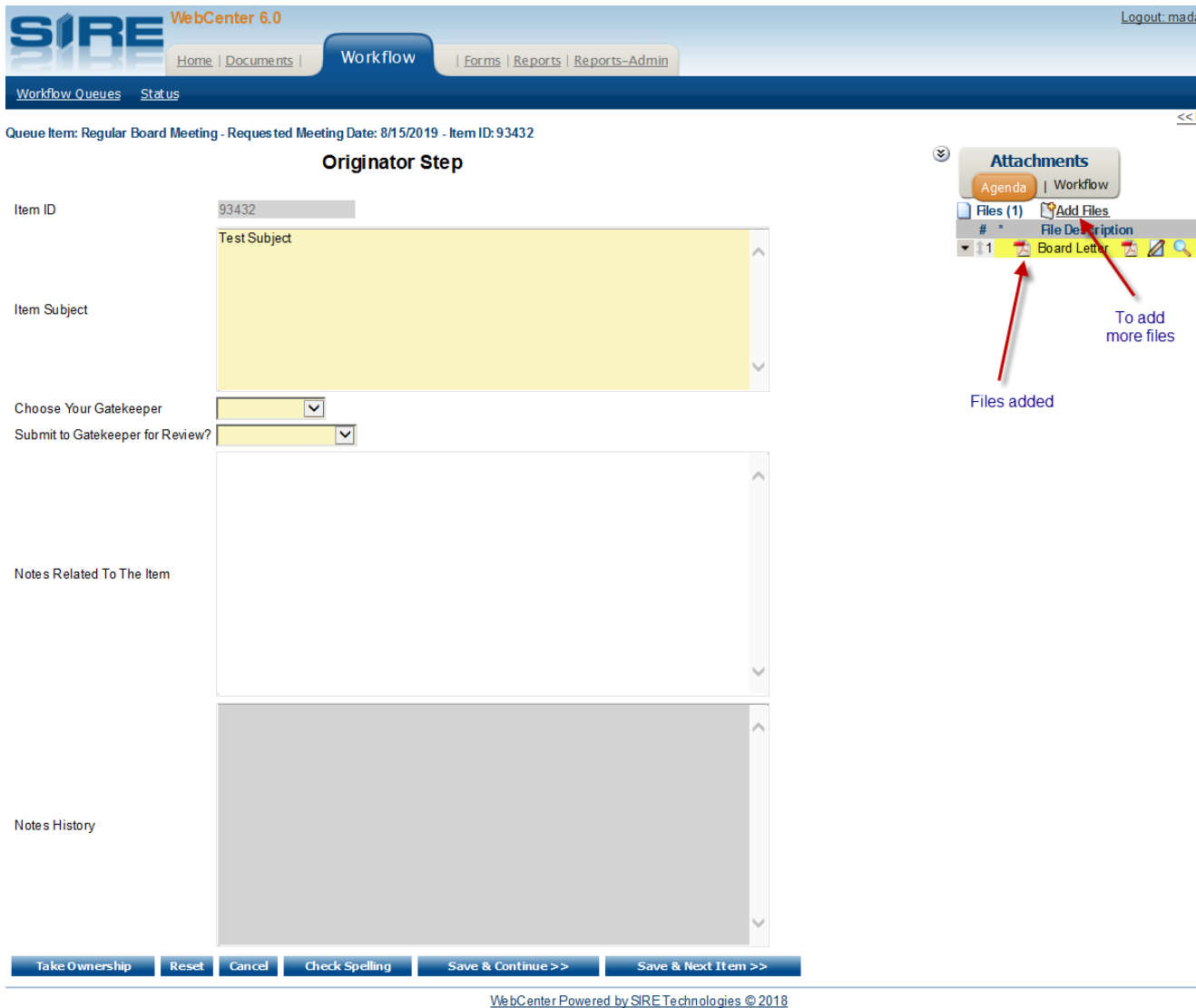


Figure 31. Originator Queue

Once you have opened the item, you will see a page that resembles Figure 32.



**Figure 32. Originator Step Details**

From this page, you can continue to work with the attachments on the right-hand side of the screen. (See Section 10.0).

You can also route the item to your Gatekeeper. It is necessary to route the item to your Gatekeeper to continue the process. Select your Gatekeeper from the pull-down menu of Choose your Gatekeeper. Select Yes from the Submit to Gatekeeper for Review. It is possible to select yourself as the Gatekeeper for the item. If you choose to do so, you must perform the steps as the Gatekeeper as well as the Originator.

It is also possible to Cancel the item or keep the item in your Work Queue. To Cancel the item, select your Gatekeeper from the pull-down menu, and select Cancel the Item from the Submit to Gatekeeper for Review pull down. The item will NOT be routed to the Gatekeeper but will be cancelled.

### Originator Step

Item ID	93432
Item Subject	Test Subject
Choose Your Gatekeeper	Kristin Madary
Submit to Gatekeeper for Review?	CANCEL THE ITEM NO YES

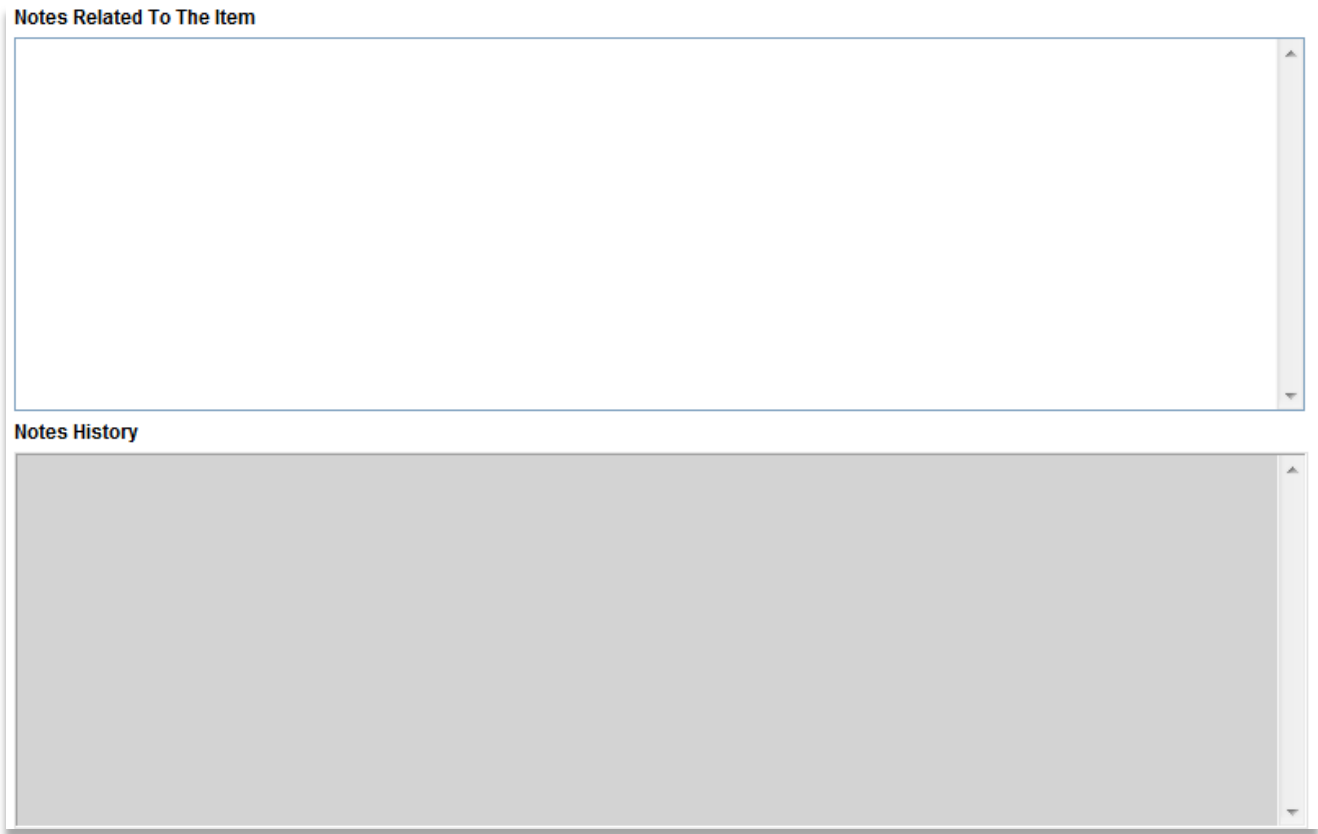


**Figure 33. Canceling the Item**

To keep the item in your Work Queue to continue working on the item, select your Gatekeeper from the pull-down menu, and select NO from the Submit to Gatekeeper for Review pull-down menu.

The Originator Step is one of the few steps where it is possible to change the Subject line.

It is also possible to add Notes to the item. Any information added to the Notes field is viewable by everyone in the Reviewing process. Anything written to the Notes field by anyone in the process is automatically appended to the Notes History field, along with the username, date, and time, in chronological order, with the latest item displayed at the top of the list.



**Figure 34. Notes and Notes History**

## 11.2 WORK QUEUE – GATEKEEPER – STEP 2

Once the Originator has released the item to the Gatekeeper, the Gatekeeper can review the item, including all the attachments (See Section 3.5), return the item to the Originator, or release the item to the Administrator.

The Gatekeeper may also edit the Subject line.

The Gatekeeper may also read any notes that the Originator has supplied, as well as, add any additional notes. All Notes added by the Originator or Gatekeeper are viewable by all parties in the Review process.

### Department Gatekeeper Review

Item ID: 93432

Item Subject: Test Subject

Submit to CEO's Office for placement on the Agenda?  YES  NO  SEND BACK TO ORIGINATOR

Notes Related To The Item

Notes History

**Attachments**

Agenda | Workflow

Files (1) Add Files

#	File Description	R	C
1	Board Letter		

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**Figure 35. Gatekeeper Step**

If you need to cancel the item from the Gatekeeper Step, return the item to the Originator, and the Originator can cancel the item. See Figure 35 for a selection of routing options. The Originator can follow the steps in Figure 33.

**11.3 WORK QUEUE – ITEMS RETURNED BY ADMINISTRATOR – STEP 3**

Anytime the Administrator has a comment or needs changes made to the Board item, the item must return to the Gatekeeper.

Typically, when the Administrator has returned an item to the Gatekeeper there are Notes added to the Notes History section explaining why he/she returned it and what he/she wants done. It is also possible that the Administrator has edited your document(s). The Administrator has been trained to explain his/her changes in the Notes History field or highlight the text in some way to call your attention to the change.

## 12.0 SIRE SUPPORT AND VACATION DELEGATION

### 12.1 VACATION RULE

If you are going on vacation or will be out of the office and would like to setup delegation of your role, please contact the CEO IT Support Team with the information below at:

Email: [ceo.itsupport@ventura.org](mailto:ceo.itsupport@ventura.org)

- Your name (i.e., the employee that will be out of the office).
- Name of the person you are delegating to (i.e., the covering employee).
- Dates you would like delegation to start and stop.
  - Start date and time
  - End date and time

**PLEASE NOTE THAT DELEGATION WILL AFFECT ALL ITEMS IN YOUR QUEUE.**

### 12.2 SIRE IT SUPPORT

For user management or any other issues with SIRE please contact the CEO IT Support Team at

[CEO.ITSupport@ventura.org](mailto:CEO.ITSupport@ventura.org) or call (805) 658-4333.

## 13.0 STAFF CONTACT INFO

### VCCOB Administrator

Robert Bravo (805) 662-6868  
[robert.bravo@ventura.org](mailto:robert.bravo@ventura.org)

### Clerk of the Board

Jessica Kam (805) 654-2558  
[jessica.kam@ventura.org](mailto:jessica.kam@ventura.org)

Rosa Gonzalez (805) 654-2533  
[rosa.gonzalez@ventura.org](mailto:rosa.gonzalez@ventura.org)

Board Book, VCCOB User Manual and Material Templates can be accessed at:

[www.ventura.org/cob/vccob-staff-materials](http://www.ventura.org/cob/vccob-staff-materials)

Ventura County Consolidated Oversight Board web page:

[www.ventura.org/ceo/cob/vccob](http://www.ventura.org/ceo/cob/vccob)

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