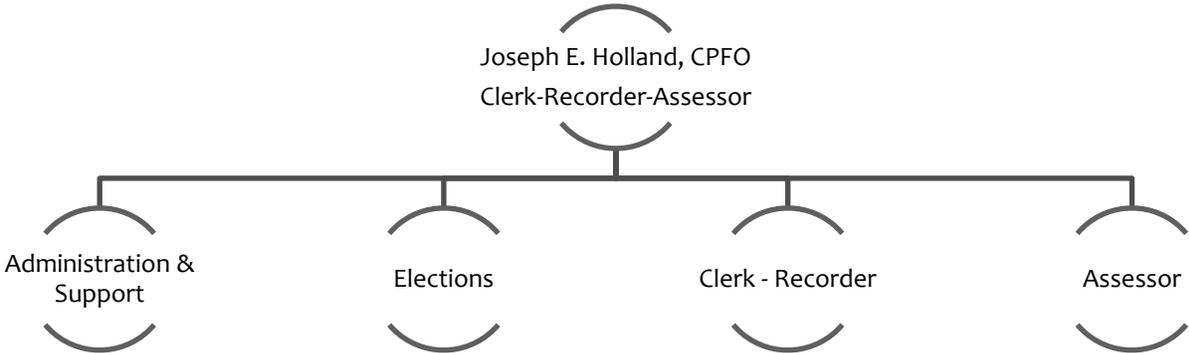


Clerk-Recorder-Assessor



BUDGET & FULL-TIME EQUIVALENTS SUMMARY & BUDGET PROGRAMS CHART

Operating	\$ 17,487,118
Capital	\$ 2,725,000
FTEs	98.5



Clerk-Recorder-Assessor

Department

MISSION STATEMENT

To honor the public's trust by assuring honest and open elections, recording, maintaining and preserving property and vital records, setting fair and impartial values for tax purposes, and providing courteous and professional service at a reasonable cost.

DEPARTMENT DESCRIPTION

The Clerk-Recorder-Assessor Department has three direct service budget programs: Assessor, Clerk-Recorder, and Elections.

Within the official duties as prescribed by the Revenue and Taxation Code, the Assessor Program is responsible for fairly, timely, and accurately assessing the value on all taxable property and creating the annual assessment roll which is the basis for the funding of public services.

In accordance with various sections of the California Government Code, the Clerk-Recorder Program records all official documents for the County, registers and issues copies of vital records (births, deaths, and marriages), and serves as the custodian for those records. In addition, the Clerk function of the Clerk-Recorder provides for filing of domestic partnerships, fictitious business names, notary bonds, and other miscellaneous filings and services.

In accordance with the official duties prescribed by the Election Code, the Elections Program primarily is responsible for registering voters, maintaining a current voter file, and ensuring that voters of the County have the tools they need, the equipment they trust, the information and access they deserve, and the right they value in order to participate in the election process.

The Administration and Support Program provides support functions to the Department's direct service programs by providing leadership and direction in support of the Department's overall mission and goals.

HIGHLIGHTS OF 2017-19 OBJECTIVES

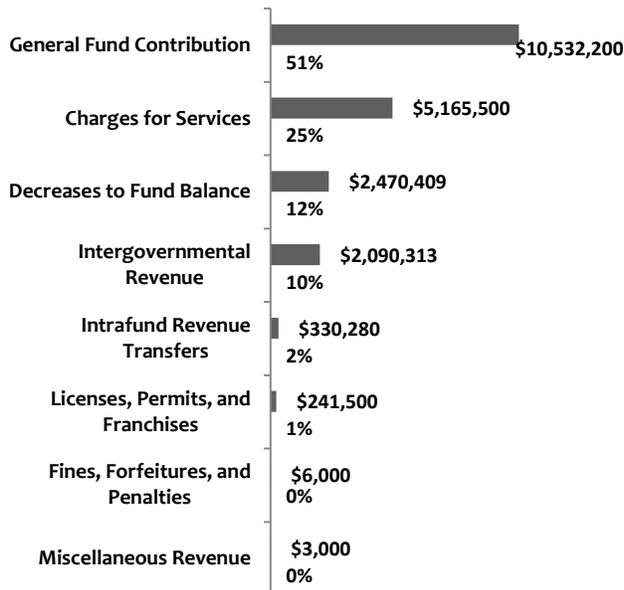
- The Assessor anticipates reviewing an estimated 11,000 parcels subject to Prop 8/Section 51 of the Revenue and Taxation Code, which require property values to be enrolled at the lesser of factored base value or market value as of the January 1st tax lien date, by June 30th as part of the assessment roll.
- The Assessor will continue the process of modernizing the Assessor Property System.
- Elections will conduct the 2018 Direct Primary Election, the 2018 Gubernatorial General Election, and any local elections requested by local agencies.
- Elections will acquire and implement a new vote tabulation system in Fiscal Year 2017-18 with a goal of using the new system in the FY 17-18 Primary election.
- The Clerk-Recorder will record an estimated 85,000 official documents per Fiscal Year and index 100% of those documents the same day.
- The Clerk-Recorder plans to complete the mandated redaction of Social Security Numbers in all official records dating back to 1980.

Clerk-Recorder-Assessor

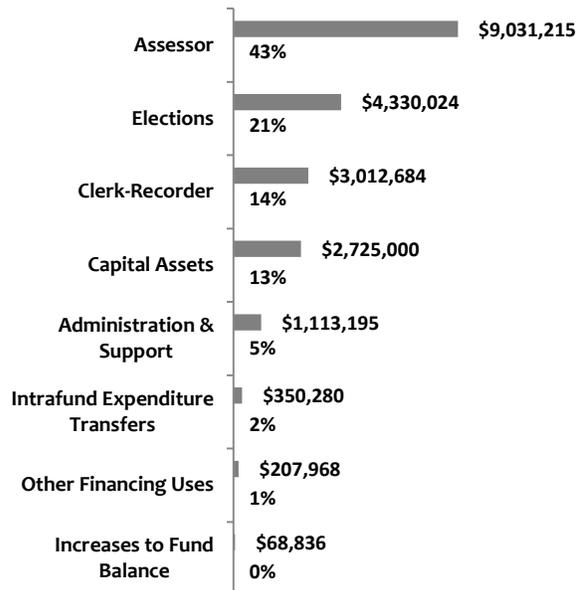
Department

RECOMMENDED SOURCES & USES OF FUNDS

Source of Funds - \$20,839,202

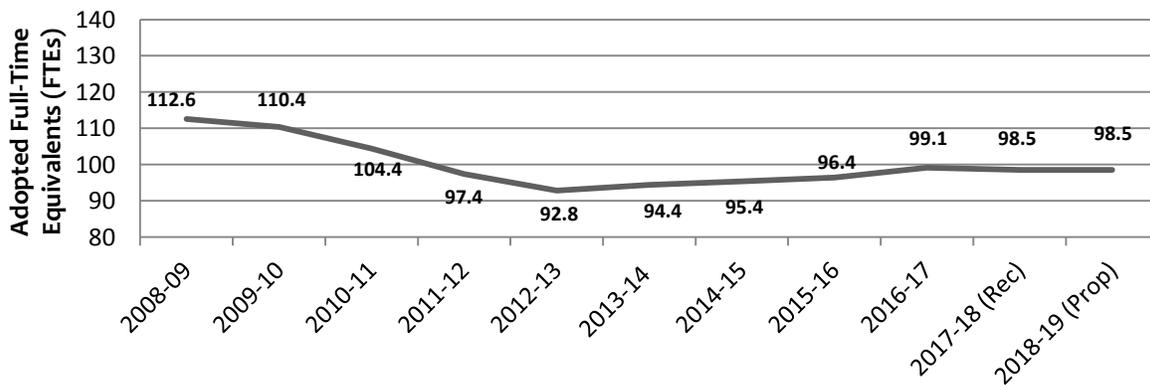


Use of Funds - \$20,839,202



STAFFING TREND

The staffing trend values will differ from prior year budget books in order to show amounts without the impact of any vacancy factors.



Clerk-Recorder-Assessor

Department

BUDGET OVERVIEW

Staffing Detail By Budget Program	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
Administration & Support	5.59	5.80	(0.48)	5.32	5.32
Elections	15.69	12.50	(0.20)	12.30	12.50
Clerk-Recorder	18.26	17.40	1.59	18.98	18.78
Assessor	61.37	63.42	(1.52)	61.90	61.90
Total	100.91	99.12	(0.62)	98.50	98.50
<hr/>					
Budget By Budget Program					
Administration & Support	\$ 1,088,918	\$ 1,148,034	\$ (34,839)	\$ 1,113,195	\$ 1,149,391
Elections	3,439,228	4,216,383	113,641	4,330,024	4,346,664
Clerk-Recorder	2,295,735	2,796,307	216,377	3,012,684	3,079,116
Assessor	8,045,340	8,869,471	161,744	9,031,215	9,485,289
Total	\$ 14,869,222	\$ 17,030,195	\$ 456,923	\$ 17,487,118	\$ 18,060,460
<hr/>					
Budget By Categories of Expenditures					
Salaries and Employee Benefits	\$ 11,622,631	\$ 12,874,661	\$ 206,098	\$ 13,080,759	\$ 13,738,843
Services and Supplies	2,555,515	3,435,422	175,597	3,611,019	3,493,768
Other Charges	691,077	720,112	75,228	795,340	827,849
Total Operating Expenditures	14,869,222	17,030,195	456,923	17,487,118	18,060,460
Capital Assets	93,844	125,000	2,600,000	2,725,000	125,000
Other Financing Uses	207,966	207,968	-	207,968	207,968
Intrafund Expenditure Transfers (+)	11,311	20,000	330,280	350,280	350,280
Increases to Fund Balances	1,032,012	472,734	(403,898)	68,836	80,180
Fund Balance Impact (+)	167,160	-	-	-	-
Total	\$ 16,381,515	\$ 17,855,897	\$ 2,983,305	\$ 20,839,202	\$ 18,823,888
<hr/>					
Budget By Categories of Revenues					
Licenses, Permits and Franchises	\$ 258,458	\$ 235,000	\$ 6,500	\$ 241,500	\$ 242,000
Fines, Forfeitures, and Penalties	7,280	5,000	1,000	6,000	6,000
Use of Money and Property	1	-	-	-	-
Intergovernmental Revenue	71,119	10,000	2,080,313	2,090,313	10,000
Charges for Services	5,274,907	5,800,721	(635,221)	5,165,500	5,645,500
Miscellaneous Revenue	19,461	3,000	-	3,000	3,000
Total Operating Revenues	5,631,225	6,053,721	1,452,592	7,506,313	5,906,500
Intrafund Expenditure Transfers (-)	-	-	330,280	330,280	330,280
Decreases to Fund Balances	257,290	1,002,676	1,467,733	2,470,409	1,074,445
General Fund Contribution	10,493,000	10,799,500	(267,300)	10,532,200	10,326,100
Fund Balance Impact (-)	-	-	-	-	1,186,563
Total	\$ 16,381,515	\$ 17,855,897	\$ 2,983,305	\$ 20,839,202	\$ 18,823,888

Clerk-Recorder-Assessor

Department

CHANGES & OPERATIONAL IMPACT: 2016-17 ADOPTED TO 2017-18 RECOMMENDED

Staffing

- Net decrease of 0.62 FTEs due to the elimination of an Appraiser (1.0 FTE) position and a part-time Administrative Office Professional (0.62 FTE) in the Assessor Division, offset by an additional Administrative Office Professional 1.0 FTE in the Clerk-Recorder, fully funded by Recorder revenues.

The Department's budgeted staff has decreased by 20 FTE's since FY 2007-08. Over this period of time, workload in some programs decreased, reducing the level of staff needed. However, other staff reductions were necessary to absorb the impact of decreasing revenues, increasing costs, and County implemented budget reductions. This challenge has been compounded in recent years by the loss of experienced staff in the Assessor's office. The sub-optimal FY 2017-18 Recommended staffing level continues to impact service delivery of the Department, specifically in the Assessor Programs. Without optimal long-term staffing, the Assessor's ability to timely and accurately assess the value on all taxable property will continue to be impacted and the Assessor may continue to experience increases in assessment work backlog.

Expenditures

- Net operating expenditure increase of \$457,000:
 - +\$206,000 net increase in Salaries and Employee Benefits costs to fund 98.5 FTEs.
 - +\$176,000 net increase in Services and Supplies primarily in the Elections division due to the anticipated impacts of a new mandated voter registration program (Motor Voter) combined with minimum wage cost increases for Temporary Staff and Poll Workers.
 - +\$75,000 net increase in Other Charges primarily related to an increase in Information Technology Department data service charges.
- Net non-operating expenditure increase of \$2,526,000 primarily due to:
 - \$2,600,000 increase in Capital Asset expenditures due to the anticipated acquisition of a new vote tabulation system.
 - +330,000 increase in Intrafund Expenditure Transfers due to a change in how the department accounts for intra-department overhead charges.
 - -404,000 decrease in funds designated for future Departmental use primarily due to the impact of no election costs reimbursements for the cost of conducting the Fiscal Year 2017-18 Primary Election.

These changes result in Recommended operating expenditures of \$17,487,000, non-operating expenditures of \$3,352,000, and total expenditures of \$20,839,000. Non-operating expenditures primarily include capital assets, transfers, and increases to fund balance components.

Clerk-Recorder-Assessor

Department

CHANGES & OPERATIONAL IMPACT: 2016-17 ADOPTED TO 2017-18 RECOMMENDED (CONT'D)

Revenues

- Net operating revenue increase of \$1,453,000:
 - +2,080,000 increase in Intergovernmental Revenue in the form of grant and bond funds to offset a one-time capital expenditure on voting equipment.
 - +\$7,000 increase in Licenses, Permits and Franchises for annual fluctuations in the number of estimated marriage licenses issued.
 - -\$635,000 decrease in Charges for Services, primarily due to:
 - -\$770,000 decrease in recoverable election costs from local agencies due to FY 2017-18 being a Gubernatorial Primary Election with little to no budgeted local agency consolidation.
 - +\$218,000 net increase in Clerk-Recorder charges for services primarily from an anticipated increase in budgeted document recordings.
 - -\$83,000 net decrease in the Assessor's Program primarily due to an anticipated reduction in recoverable property tax administration fees.
- Net non-operating revenue increase of \$1,531,000 primarily due to:
 - +\$1,468,000 net increase in use of fund balances.
 - +\$858,000 increase in budgeted use of committed fund balances to balance the Department's operating budget.
 - +\$472,000 increase in use of Elections fund balance to fund the balance of voting equipment acquired primarily with Federal and State monies.
 - +\$91,000 increase in use of Departmental fund balance to fund New Assessor Property System Project costs estimated to be higher in FY 2017-18 as a result of more project manager hours dedicated to the project.
 - +\$47,000 increase in use of the Clerk-Recorder restricted fund balances needed to fund Clerk-Recorder program costs estimated to be higher in FY 2017-18.
 - +330,000 increase in Intrafund Revenue Transfers due to a change in how the department accounts for intra-department overhead charges.
 - -\$267,000 net decrease in General Fund Contribution from a \$554,000 county implemented reduction, offset by a \$287,000 general fund contribution increase for salary and benefits.

These changes result in Recommended operating revenue of \$7,506,000, non-operating revenues of \$13,333,000, and total sources of \$20,839,000. Non-operating revenues primarily include General Fund Contribution and decreases to fund balance components.

Clerk-Recorder-Assessor

Department

CHANGES & OPERATIONAL IMPACT: 2017-18 RECOMMENDED TO 2018-19 PROPOSED

Expenditures

The FY 2018-19 Proposed Budget includes no changes in staffing from the prior year's Recommended Budget. The increase in the cost of Salary and Employee Benefits for funding the same level of staff will be \$658,000. Services and Supplies are estimated to decrease by \$117,000 the majority of which is due to a reduction of one-time expenditures in the Elections Division. Capital Asset costs will decrease by \$2,600,000 due to the one-time voting equipment acquisition in Fiscal Year 2017-18.

Revenues

Departmental net operating revenue is expected to decrease by \$1,600,000 in FY 2018-19, all in the Elections Division. An increase of \$480,000 in election cost reimbursements from local agency consolidations in the FY 2018-19 Gubernatorial General Election. The increase will be offset by the loss of \$2,080,000 in one-time Federal and State funds provided to purchase voting equipment in FY 17-18.

2018-19 Budget Gap

To maintain FY 2017-18 service levels, \$18,824,000 of funding will be required in FY 2018-19. Of this amount, \$17,637,000 will be funded by departmental revenues, funding sources and General Fund Contribution, leaving a \$1,187,000 structural imbalance. The \$1,187,000 budget gap is \$329,000 greater than the gap in FY 2017-18 due to increases in Salaries and Employee Benefits, which are partially offset by an anticipated increase in Elections revenue. A funding source will need to be identified to backfill the FY 2018-19 Department gap in order to avoid critical service level reductions in creating the County's property tax roll.

RELATED LINKS

For more information on the Clerk-Recorder-Assessor's Department refer to their website at <http://sbcassessor.com/ClerkRecorder/ClerkRecorder.aspx>.

Clerk-Recorder-Assessor

Department

PERFORMANCE MEASURES

Description	FY 2014-15 Actual	FY 2015-16 Actual	FY 2016-17 Estimated Actual	FY 2017-18 Recommend	FY 2018-19 Proposed
Administration and Support					
Percent of departmental Employee Performance Reviews (EPRs) completed by the due date.	Not Used in Prior Years	82%	75%	100%	100%
Elections					
Number of voter registration transactions (adds, deletes, and changes) processed for the Fiscal Year	101,697	126,711	114,486	95,000	100,000
Number of Federal, State, and Local Elections conducted in the Fiscal Year	4	1	4	1	2
Total voter registration in the scheduled statewide election	196,998	201,865	222,983	230,000	235,000
Permanent Vote By Mail registration as a percentage of total registration	58%	62%	63%	60%	60%
Total turnout in the scheduled statewide election	114,106	118,974	182,264	80,500	129,250
Poll turnout as percentage of total votes in the scheduled statewide election	32%	32%	34%	29%	33%
Vote By Mail turnout as percentage of total votes in the scheduled statewide election	68%	68%	66%	71%	67%
Clerk Recorder					
Percentage and number of official documents recorded and indexed the same day	100% 78,339	100% 79,418	100% 88,500	100% 85,000	100% 85,000
Percentage and number of documents recorded electronically (E-Recorded)	30% 23,399	31% 24,317	34% 30,000	34% 28,900	34% 28,900
Number of marriage licenses issued	3,777	3,912	4,050	4,000	4,000

Clerk-Recorder-Assessor

Department

PERFORMANCE MEASURES (CONT'D)

Description	FY 2014-15 Actual	FY 2015-16 Actual	FY 2016-17 Estimated Actual	FY 2017-18 Recommend	FY 2018-19 Proposed
Assessor					
Total number of parcels subject to Prop 8/Section 51 of the Revenue and Taxation Code	18,100	16,300	14,200	11,000	9,000
Retention rate and retained value of property under appeal	88% \$1.9 Billion	95% \$1.25 Billion	91% Unknown	94% Unknown	90% Unknown

Clerk-Recorder-Assessor

Program

ADMINISTRATION & SUPPORT

The Administration and Support Program serves as support functions to the Department's direct service programs by providing leadership and direction in support of the Department's overall mission and goals.

Staffing

Staffing Detail By Budget Program	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
COUNTY CLK-REC-ASSESSOR	1.00	1.00	-	1.00	1.00
CHIEF DEPUTY CLERK-RECORDER	0.02	-	-	-	-
PROGRAM MANAGER	0.09	0.20	(0.10)	0.10	0.10
EDP OFFICE AUTO SPEC	0.86	1.00	(0.19)	0.81	0.81
FINANCIAL SYS ANALYST SR	0.01	-	-	-	-
HR MANAGER	0.99	1.00	-	1.00	1.00
ADMINISTRATIVE LDR-GEN	0.28	-	-	-	-
COMPUTER SYSTEMS SPEC	0.99	1.00	(0.19)	0.81	0.81
FISCAL MANAGER	-	1.00	-	1.00	1.00
TEAM/PROJECT LDR-GEN	0.63	-	-	-	-
FINANCIAL OFFICE PRO SR	0.66	0.60	-	0.60	0.60
EXTRA HELP	0.06	-	-	-	-
Total	5.59	5.80	(0.48)	5.32	5.32

Revenue & Expenditures

Budget By Categories of Expenditures	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
Salaries and Employee Benefits	\$ 994,876	\$ 987,345	\$ (37,779)	\$ 949,566	\$ 984,222
Services and Supplies	66,687	124,200	(1,500)	122,700	122,700
Other Charges	27,354	36,489	4,440	40,929	42,469
Total Operating Expenditures	1,088,918	1,148,034	(34,839)	1,113,195	1,149,391
Capital Assets	-	50,000	-	50,000	50,000
Total Expenditures	\$ 1,088,918	\$ 1,198,034	\$ (34,839)	\$ 1,163,195	\$ 1,199,391
Budget By Categories of Revenues					
Miscellaneous Revenue	15,434	-	-	-	-
Total Operating Revenues	15,434	-	-	-	-
Intrafund Expenditure Transfers (-)	-	-	330,280	330,280	330,280
Decreases to Fund Balances	-	229,044	(229,044)	-	-
General Fund Contribution	1,355,452	968,990	(136,075)	832,915	869,111
Total Revenues	\$ 1,370,886	\$ 1,198,034	\$ (34,839)	\$ 1,163,195	\$ 1,199,391

Clerk-Recorder-Assessor

Program

ADMINISTRATION & SUPPORT (CONT'D)

2016-17 Anticipated Accomplishments

- Developed and implemented an attainable budget with the least impact on program service levels.
- Coordinated recruitment efforts to fill departmental vacancies due to staff attrition.

2017-19 Objectives

- Prepare, monitor, and execute a FY 2017-18 Budget in support of the Department's FY 2017-18 goals and objectives.
- Provide administrative support in the timely recruitment of new staff as attrition occurs to minimize impact on service levels and ensure business continuity.

Clerk-Recorder-Assessor

Program

ELECTIONS

The Elections Program primarily is responsible for registering voters, maintaining a current voter file, and ensuring that voters of the County have the tools they need, the equipment they trust, the information and access they deserve, and the right they value in order to participate in the election process.

Staffing

Staffing Detail By Budget Program	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
CHIEF DEPUTY CLERK-RECORDER	0.01	-	-	-	-
CHIEF DEPUTY REGISTRAR OF VOTERS	1.00	1.00	-	1.00	1.00
CHIEF DEPUTY ASSESSOR	0.01	-	-	-	-
PROGRAM MANAGER	1.00	1.00	-	1.00	1.00
EDP OFFICE AUTO SPEC	0.08	-	-	-	-
PROJECT MANAGER	0.02	-	-	-	-
HR MANAGER	0.01	-	-	-	-
EDP SYS & PROG ANLST	0.34	0.50	(0.20)	0.30	0.50
ASSESSMENT SUPERVISOR	0.02	-	-	-	-
ADMN OFFICE PRO	1.49	2.00	-	2.00	2.00
COMPUTER SYSTEMS SPEC	0.01	-	-	-	-
DEPT BUS SPEC	2.00	2.00	-	2.00	2.00
MAPPING/GIS ANALYST	0.20	-	-	-	-
APPRAISER	0.07	-	-	-	-
TEAM/PROJECT LDR-GEN	0.01	-	-	-	-
ADMN OFFICE PRO SR	4.54	6.00	-	6.00	6.00
FINANCIAL OFFICE PRO SR	0.01	-	-	-	-
EXTRA HELP	4.87	-	-	-	-
Total	15.69	12.50	(0.20)	12.30	12.50

Revenue & Expenditures

Budget By Categories of Expenditures	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
Salaries and Employee Benefits	\$ 1,732,716	\$ 1,874,802	\$ (41,296)	\$ 1,833,506	\$ 1,945,025
Services and Supplies	1,559,734	2,149,952	157,097	2,307,049	2,204,798
Other Charges	146,779	191,629	(2,160)	189,469	196,841
Total Operating Expenditures	3,439,228	4,216,383	113,641	4,330,024	4,346,664
Capital Assets	69,240	30,000	2,600,000	2,630,000	30,000
Other Financing Uses	207,966	207,968	-	207,968	207,968
Intrafund Expenditure Transfers (+)	11,311	20,000	-	20,000	20,000
Total Expenditures	\$ 3,727,744	\$ 4,474,351	\$ 2,713,641	\$ 7,187,992	\$ 4,604,632
Budget By Categories of Revenues					
Intergovernmental Revenue	71,119	10,000	2,080,313	2,090,313	10,000
Charges for Services	53,905	795,000	(770,000)	25,000	505,000
Total Operating Revenues	125,023	805,000	1,310,313	2,115,313	515,000
Decreases to Fund Balances	-	150,136	471,805	621,941	-
General Fund Contribution	3,827,404	3,519,215	931,523	4,450,738	4,089,632
Total Revenues	\$ 3,952,427	\$ 4,474,351	\$ 2,713,641	\$ 7,187,992	\$ 4,604,632

Clerk-Recorder-Assessor

Program

ELECTIONS (CONT'D)

2016-17 Anticipated Accomplishments

- Successfully conducted the 2016 Presidential General Election as well as a Retirement Board Election and the Cuyama Water Basin District Election. Will conduct the Isla Vista Recreation and Park District Election in May 2017.
- Through voter outreach and support, increased the voter turnout rate 1% and the number of registered voters by 9% over the last Presidential General election.
- Establish efficient processes and procedures for the implementation of Conditional Voter Registration, which will allow voters to register to vote and vote on the same day, up to and including Election Day.
- Commenced reviewing and revising all Elections website content. Once all content has been revised, will work with the Secretary of State's office as well as the members of the Santa Barbara County Voting Accessibility Advisory Committee to determine how to best provide the information in an accessible format.
- Successfully completed the revision of the Single Comprehensive Code to align with the reporting categories required by the Political Reform Act, resulting in more equitable reporting requirements based on job duties.
- Increased Participation in the Student Pollworker Program from 103 in the 2014 Gubernatorial General to 153 in the 2016 Presidential General Election, an increase of 48.5%.
- In preparation for the implementation of a statewide voter registration database, participated in a second mock election in August 2016 to determine necessary process changes and anticipate impacts.
- Successfully installed three drive-thru ballot drop boxes to increase voting participation. Over 6,300 ballots were returned in the ballot drop boxes for the 2016 Presidential General Election, 5.3% of the total vote-by-mail ballot returns.
- Increased the number of bilingual pollworkers from the previous Presidential General Election by 28.3%. Contracted with a call-in interpreter service to provide bilingual assistance to voters in 117 languages at each office and polling place location.
- Have continually increased the number of vote-by-mail ballots issued and returned at each Presidential General Election since 2008. In the 2016 Presidential General Election, issued 160,065 vote-by-mail ballots compared to 123,932 issued at the Presidential General Election in 2012, an increase of 29.2%. 124,978 vote-by-mail ballots were returned in 2016 compared to 100,676 in 2012, an increase of 24.1%

2017-19 Objectives

- Conduct the 2018 Direct Primary Election, the 2018 Gubernatorial General Election, and any local elections as requested by local agencies.
- Continue to update the Elections website to make information more accessible to voters.
- Acquire and implement a new vote tabulation system in Fiscal Year 2017-18 with a goal of using the new system in the FY 17-18 Primary election.
- Senate Bill 450 allows specified counties on or after January 1, 2018, and any county on or after January 1, 2020, to conduct all-mailed ballot elections if certain conditions are satisfied. Will continue to evaluate the viability and cost-effectiveness of this option for Santa Barbara County.

Clerk-Recorder-Assessor

Program

CLERK-RECORDER

The Clerk-Recorder Program records all official documents for the County, registers and issues copies of vital records (births, deaths, and marriages), and serves as the custodian for those records. In addition, the Clerk function of the Clerk-Recorder provides for filing of domestic partnerships, fictitious business names, notary bonds, and other miscellaneous filings and services.

Staffing

Staffing Detail By Budget Program	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
CHIEF DEPUTY CLERK-RECORDER	0.97	1.00	-	1.00	1.00
DIVISION CHIEF	1.54	1.00	-	1.00	1.00
PROGRAM MANAGER	0.06	-	-	-	-
EDP OFFICE AUTO SPEC	0.06	-	0.19	0.19	0.19
EDP SYS & PROG ANLST	0.66	0.50	0.20	0.70	0.50
ADMN OFFICE PRO	8.32	9.50	2.00	11.50	11.50
ADMINISTRATIVE LDR-GEN	0.02	-	-	-	-
COMPUTER SYSTEMS SPEC	-	-	0.19	0.19	0.19
TEAM/PROJECT LDR-GEN	0.05	-	-	-	-
FINANCIAL OFFICE PRO SR	0.32	0.40	-	0.40	0.40
ADMN OFFICE PRO SR	3.31	5.00	(1.00)	4.00	4.00
EXTRA HELP	2.94	-	-	-	-
Total	18.26	17.40	1.59	18.98	18.78

Revenue & Expenditures

Budget By Categories of Expenditures	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
Salaries and Employee Benefits	\$ 1,749,840	\$ 2,085,960	\$ 174,228	\$ 2,260,188	\$ 2,334,319
Services and Supplies	410,374	568,850	22,000	590,850	575,850
Other Charges	135,522	141,497	20,149	161,646	168,947
Total Operating Expenditures	2,295,735	2,796,307	216,377	3,012,684	3,079,116
Capital Assets	15,205	25,000	-	25,000	25,000
Intrafund Expenditure Transfers (+)	-	-	330,280	330,280	330,280
Increases to Fund Balances	632,012	114,185	(45,349)	68,836	80,180
Total Expenditures	\$ 2,942,953	\$ 2,935,492	\$ 501,308	\$ 3,436,800	\$ 3,514,576
Budget By Categories of Revenues					
Licenses, Permits and Franchises	258,458	235,000	6,500	241,500	242,000
Fines, Forfeitures, and Penalties	7,280	5,000	1,000	6,000	6,000
Charges for Services	2,672,566	2,352,900	217,600	2,570,500	2,570,500
Miscellaneous Revenue	4,024	3,000	-	3,000	3,000
Total Operating Revenues	2,942,328	2,595,900	225,100	2,821,000	2,821,500
Decreases to Fund Balances	164,085	339,592	276,208	615,800	693,076
Total Revenues	\$ 3,106,413	\$ 2,935,492	\$ 501,308	\$ 3,436,800	\$ 3,514,576

Clerk-Recorder-Assessor

Program

CLERK-RECORDER (CONT'D)

2016-17 Anticipated Accomplishments

- Record approximately 88,500 official documents in the current Fiscal Year and index 100% of the records in the same day.
- Began to index additional trustor names on Substitution of Trustee documents which provides better customer service and more transparency for the records.
- Replaced the hardware environment comprised of many servers and improved the ability to restore operations in the event of a major disaster.
- Purchased a new microfilm digital scanner and is performing various automation projects to digitize the vital and official records.
- Began the process of replacing master microfilm for the official records for the period of recording from 1959-1974. The project will result in film that will last 200 years, data entry for this historic index and creation of a database to search and access the records digitally. This is a multi-year project that will be completed in phases and the work with the vendor has begun in creating the digital images and enhancing the quality of the images.

2017-19 Objectives

- Complete the mandated redaction of Social Security Numbers in all official records dating back to 1980 (Required to be completed as of 12/31/2017).
- Pursue updating the Documentary Tax Ordinance to clarify and include recent updates from the legislature regarding the tax.
- Pursue standardizing Indexing practices with other counties, create a new training manual, and provide training for the staff.
- Accelerate automating the historic birth certificates which currently reside on microfilm and paper books, which will decrease the wait time for customers requesting birth records from the 1960's.

Clerk-Recorder-Assessor

Program

ASSESSOR

The Assessor Program is responsible for fairly, timely, and accurately assessing the value on all taxable property and creating the annual assessment roll which is the basis for the funding of public services.

Staffing

Staffing Detail By Budget Program	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
CHIEF DEPUTY ASSESSOR	0.99	1.00	-	1.00	1.00
PROGRAM MANAGER	3.85	3.80	0.10	3.90	3.90
FINANCIAL SYS ANALYST SR	1.57	2.00	-	2.00	2.00
PROJECT MANAGER	0.98	1.00	-	1.00	1.00
EDP SYS & PROG ANLST SR	2.62	3.00	-	3.00	3.00
EDP SYS & PROG ANLST	1.00	1.00	-	1.00	1.00
MAPPING/GIS ANALYST SUPV	1.00	1.00	-	1.00	1.00
ASSESSMENT SUPERVISOR	4.98	6.00	-	6.00	6.00
ADMN OFFICE PRO	10.23	10.62	(0.62)	10.00	10.00
MAPPING/GIS ANALYST	2.34	3.00	-	3.00	3.00
APPRAISER	19.54	20.00	(1.00)	19.00	19.00
AUDITOR-APPRAISER	4.31	4.00	1.00	5.00	5.00
ADMN OFFICE PRO SR	6.04	6.00	-	6.00	6.00
ACCOUNTANT-AUDITOR	0.42	1.00	(1.00)	-	-
EXTRA HELP	1.51	-	-	-	-
Total	<u>61.37</u>	<u>63.42</u>	<u>(1.52)</u>	<u>61.90</u>	<u>61.90</u>

Revenue & Expenditures

Budget By Categories of Expenditures	2015-16 Actual	2016-17 Adopted	Change from FY16-17 Ado to FY17-18 Rec	2017-18 Recommended	2018-19 Proposed
Salaries and Employee Benefits	\$ 7,145,199	\$ 7,926,554	\$ 110,945	\$ 8,037,499	\$ 8,475,277
Services and Supplies	518,720	592,420	(2,000)	590,420	590,420
Other Charges	381,422	350,497	52,799	403,296	419,592
Total Operating Expenditures	<u>8,045,340</u>	<u>8,869,471</u>	<u>161,744</u>	<u>9,031,215</u>	<u>9,485,289</u>
Capital Assets	9,399	20,000	-	20,000	20,000
Increases to Fund Balances	400,000	358,549	(358,549)	-	-
Total Expenditures	<u>\$ 8,454,740</u>	<u>\$ 9,248,020</u>	<u>\$ (196,805)</u>	<u>\$ 9,051,215</u>	<u>\$ 9,505,289</u>
Budget By Categories of Revenues					
Use of Money and Property	1	-	-	-	-
Charges for Services	2,548,436	2,652,821	(82,821)	2,570,000	2,570,000
Miscellaneous Revenue	3	-	-	-	-
Total Operating Revenues	<u>2,548,440</u>	<u>2,652,821</u>	<u>(82,821)</u>	<u>2,570,000</u>	<u>2,570,000</u>
Decreases to Fund Balances	93,205	283,904	948,764	1,232,668	381,369
General Fund Contribution	5,310,144	6,311,295	(1,062,748)	5,248,547	5,367,357
Total Revenues	<u>\$ 7,951,789</u>	<u>\$ 9,248,020</u>	<u>\$ (196,805)</u>	<u>\$ 9,051,215</u>	<u>\$ 8,318,726</u>

Clerk-Recorder-Assessor

Program

ASSESSOR (CONT'D)

2016-17 Anticipated Accomplishments

- Anticipate reviewing roughly 14,000 parcels subject to Prop 8/Section 51 of the Revenue and Taxation Code, which require property values to be enrolled at the lesser of factored base value or market value as of the January 1st tax lien date, by June 30th as part of the assessment roll.
- Performed timely resolution of assessment appeals within the statutory timeframe while adequately defending the disputed roll value at risk.
- Completed review of all parcels subject to Section 51 of the Revenue and Taxation Code, which require property values to be enrolled at the lesser of factored base value or market value as of the January 1st tax lien date, by June 30th as part of the assessment roll.
- Continued analyzing the system requirements for updating and modernizing the Assessor Property System.

2017-19 Objectives

- Review an estimated 11,000 parcels subject to Prop 8/Section 51 of the Revenue and Taxation Code, which require property values to be enrolled at the lesser of factored base value or market value as of the January 1st tax lien date, by June 30th as part of the assessment roll.
- Perform timely resolution of assessment appeals within the statutory timeframe while adequately defending \$7.6 Billion disputed roll value at risk.
- Complete Phase 3, Design, and begin Phase 4, Construction, of modernizing the Assessor Property System.

Clerk-Recorder-Assessor

