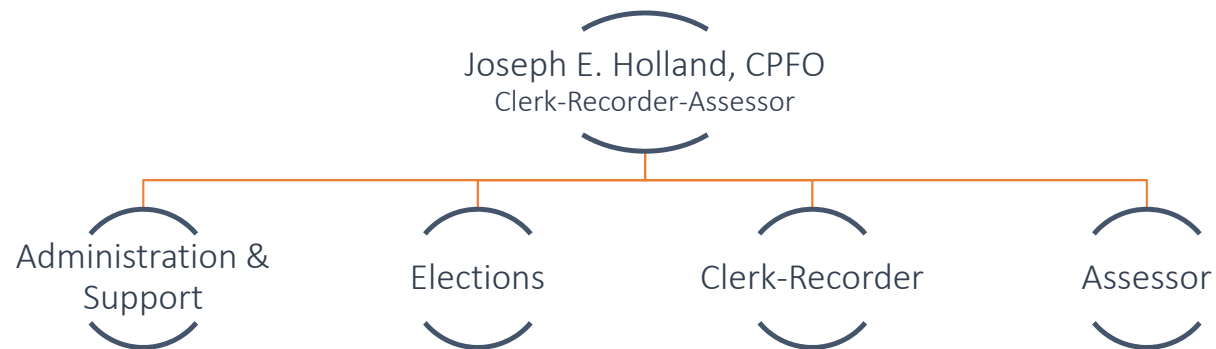




FY 2018-19

# BUDGET WORKSHOP

# CLERK-RECORDER-ASSESSOR



# KEY CHALLENGES / EMERGING ISSUES

- The Assessor Division continues to deal with a structural imbalance and diminishing reserves to cover it
- Staffing challenges in the Assessor Division related to assessments following the Thomas Fire and debris flow disaster events
- Monitoring the fiscal impact of Motor Voter Act (AB 1461) implementation within the Elections Division



# SUMMARY

Operating	\$ 17,968,100
Capital	\$ 2,625,000
General Fund	\$ 10,532,200
FTEs	99.50
Use of One-Time for Ongoing Operations	\$ 634,400; 3.6%
Service Level Reductions	\$ 0
Restoration Requests	\$ 0
Expansion Requests	\$ 0



# CAPITAL PROJECTS DETAIL

- **Voting Equipment; \$2,500,000**

Acquisition and installation of new Elections Vote Tabulation System funded with Federal Help America Vote Act (HAVA) grant funds (\$2M) and existing reserves (\$500k).

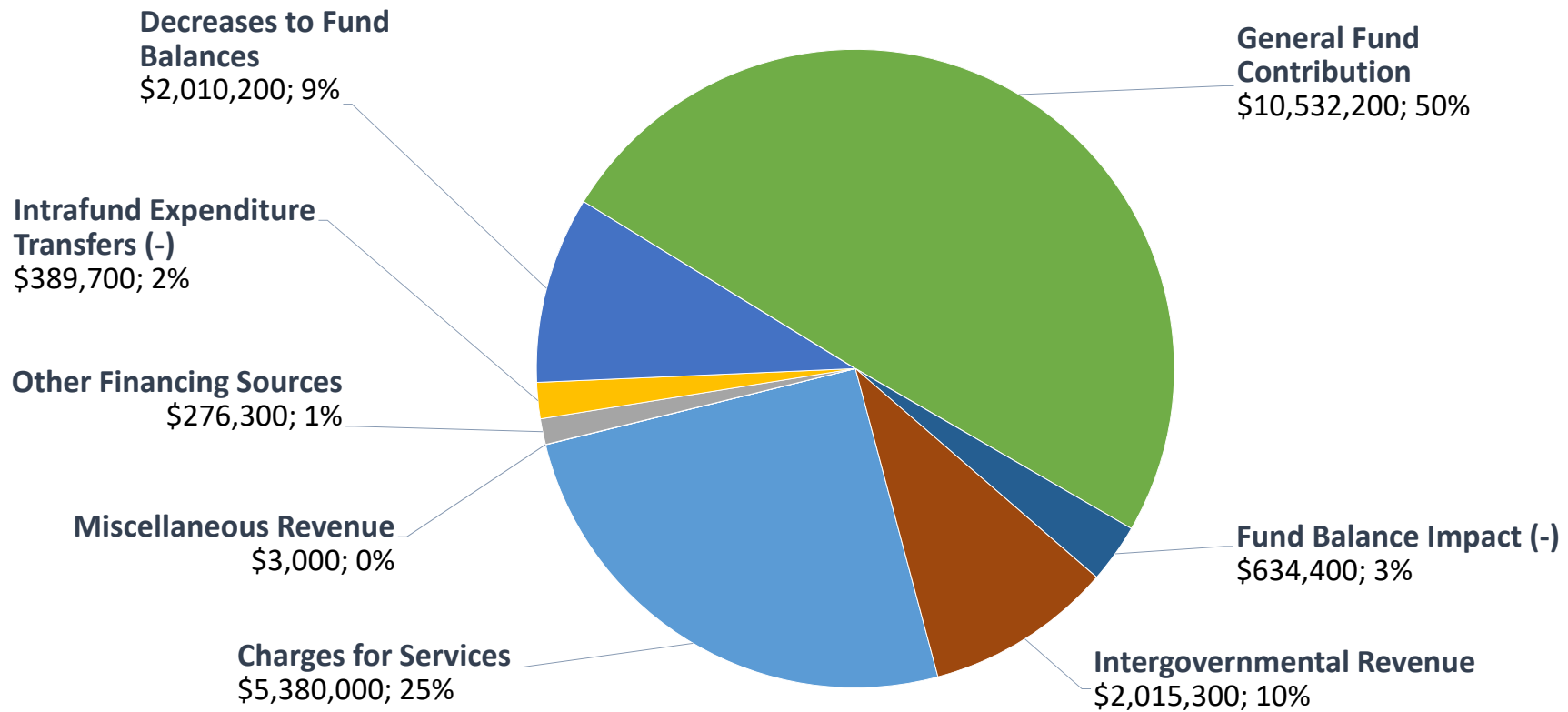
- **Assessor Property System Modernization Project; \$1,635,000**

Modernization of the existing Assessor Property System (APS) which maintains and tracks all secured properties valued at \$75 billion.

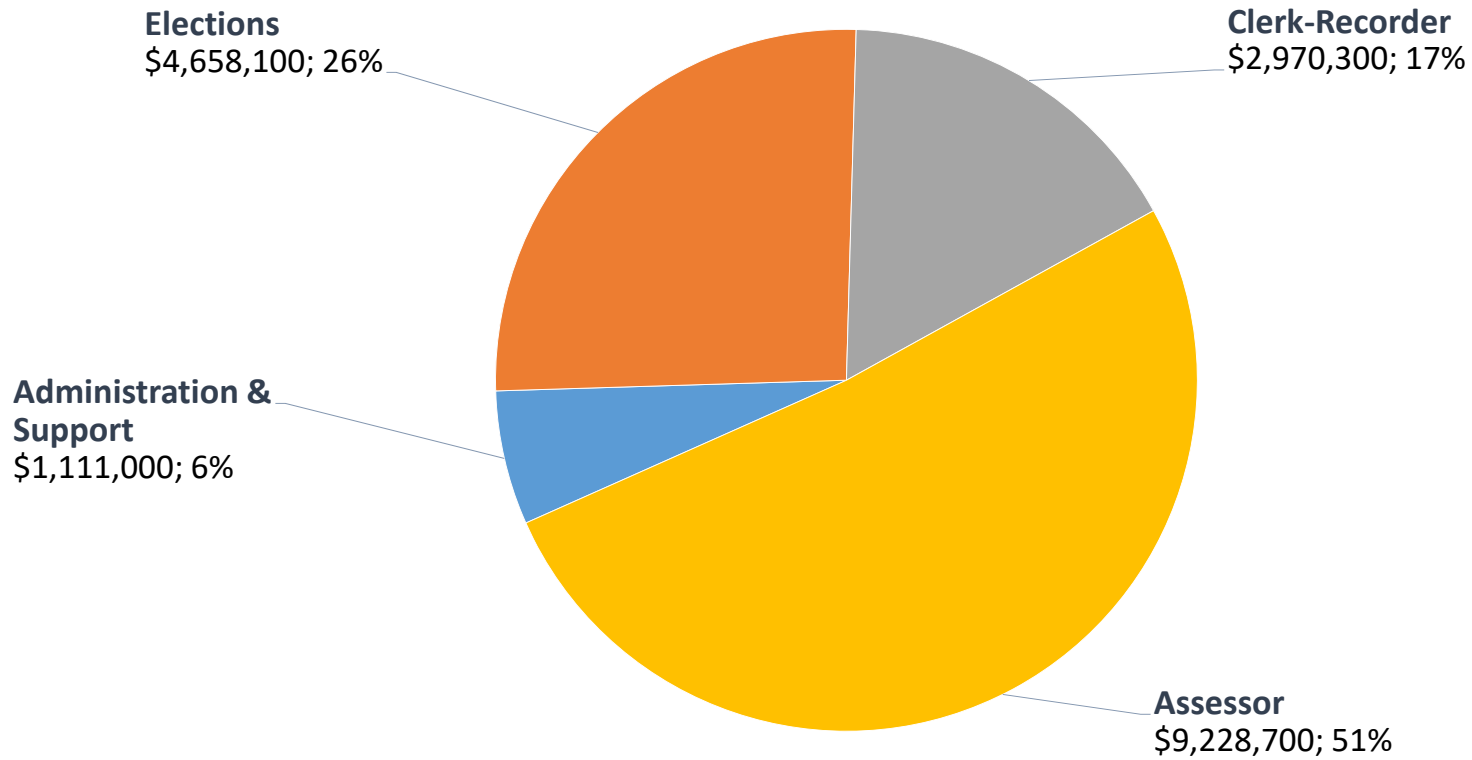
*\*Returning to the Board on May 15, 2018 to revisit project funding*



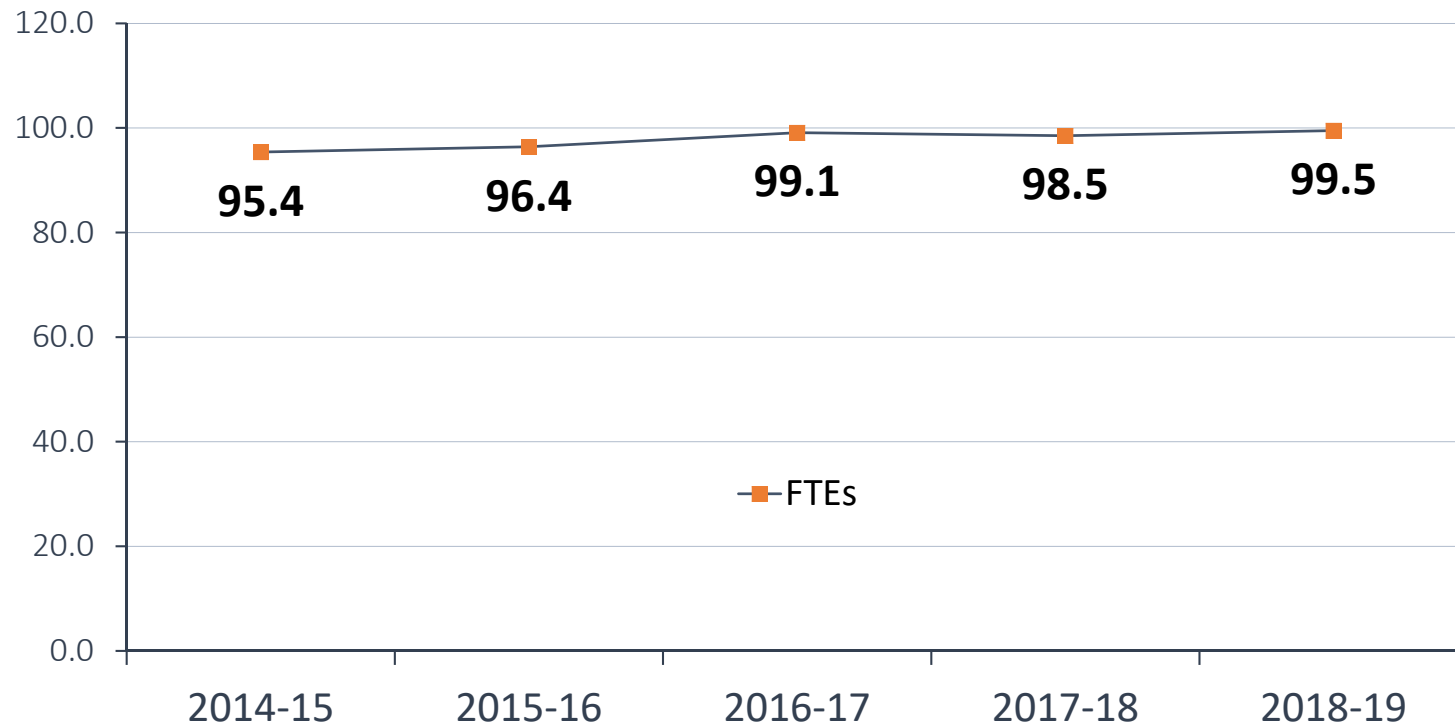
# FY 2018-19 SOURCE OF FUNDS



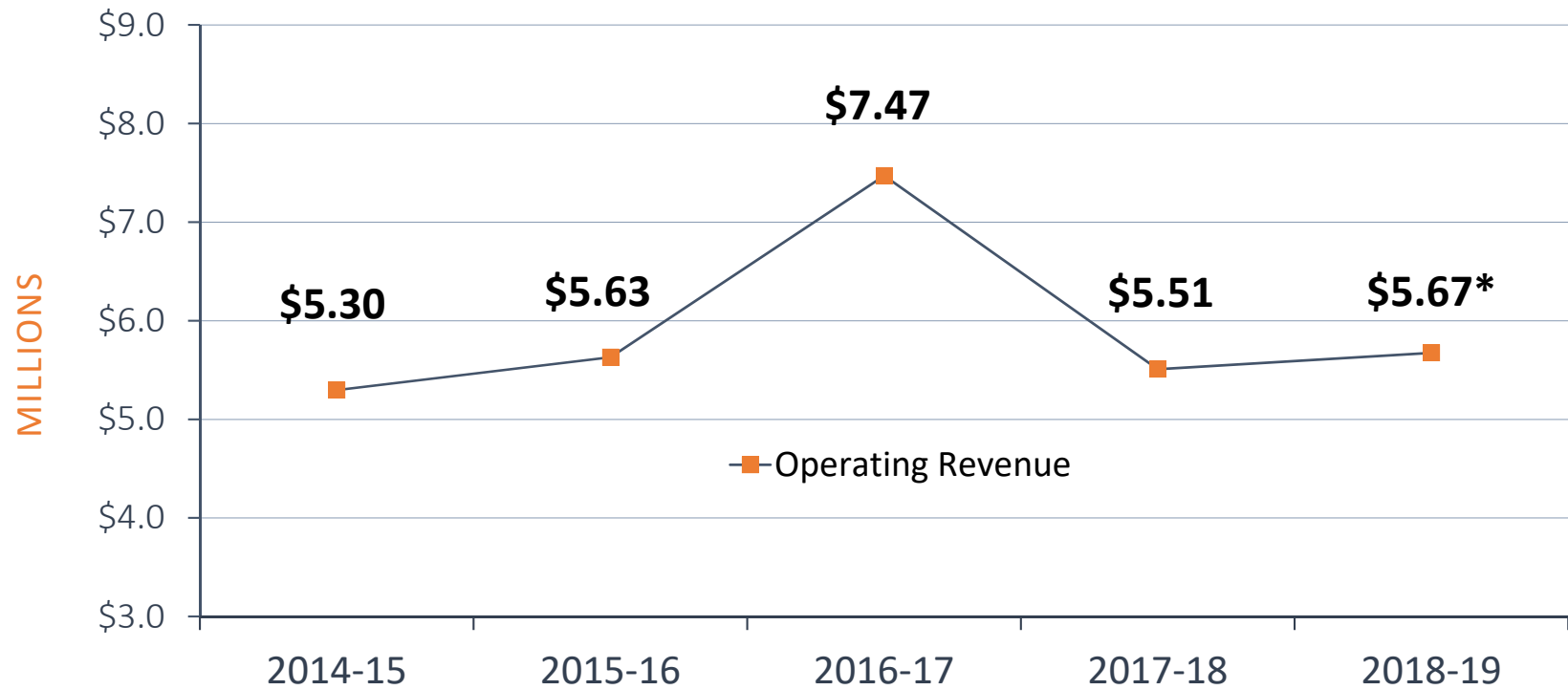
# FY 2018-19 USE OF OPERATING FUNDS



# STAFFING SUMMARY



# OPERATING REVENUE | 5-YEAR SUMMARY

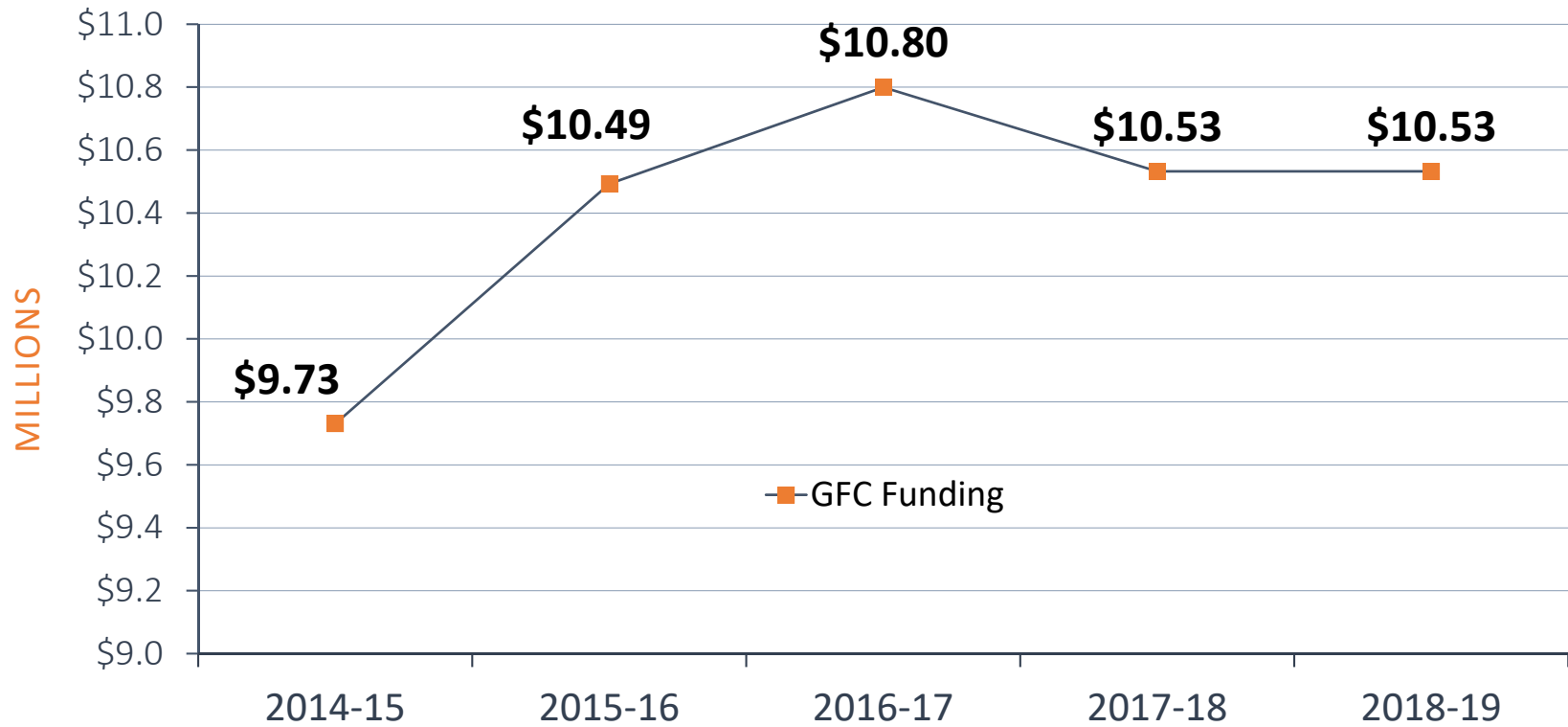


\* Does not include \$2M in one-time Federal grant revenue for Voting Equipment





# GFC | 5-YEAR SUMMARY



# FY 2017-18 ANTICIPATED ACCOMPLISHMENTS

- Elections Program

- Successfully conducted the Santa Barbara County Employees' Retirement System Board Election and the Los Olivos Community Services District Formation Election and will conduct the 2018 Statewide Direct Primary Election in June 2018.
- Revised procedures for Curbside Voting to improve processes and better serve voters needing assistance.



# FY 2017-18 ANTICIPATED ACCOMPLISHMENTS

- Clerk-Recorder Program

- Implemented the SB 2 Building Homes and Jobs Act, which included development of policies and procedures in coordination with County Counsel and the Uniform Practice Committee from the County Recorders Association. The revenue collected will be earmarked for affordable housing and administered by the California Department of Housing and Community Development.
- Provided staffing for the Local Recovery and Assistance Center, which supported residents affected by the Thomas Fire and subsequent flood and debris flow events. Fees for certified copies of vital records (birth, death, and marriage) were suspended for any individual who lost such records as a result of the wildfires and related flooding and mudslides.



# FY 2017-18 ANTICIPATED ACCOMPLISHMENTS

- Assessor Program

- Anticipate reviewing roughly 11,300 parcels subject to Prop 8/Section 51 of the Revenue and Taxation Code, which require property values to be enrolled at the lesser or factored base value or market value as of the January 1<sup>st</sup> tax lien date, by June 30<sup>th</sup> as part of the assessment roll.
- Perform timely resolution of assessment appeals within the statutory timeframe while adequately defending the \$4.1 billion disputed roll value at risk.
  - Major Appeals Cases Resolved: United Launch Alliance (ULA), Pacific Coast Energy Company (PCEC), & Canary Hotel
- Review property tax values on properties affected by the Thomas Fire and debris flow events.



# FY 2018-19 OBJECTIVES

- Elections Program

- Conduct the Montecito Fire Protection District Special Election, the 2018 Gubernatorial General Election, and any local elections as requested by local agencies.
- Finalize project to update website making it more accessible to all voters.
- Acquire and implement a new vote tabulation system in Fiscal Year 2018-19.
- Continue to evaluate the viability and cost-effectiveness of Senate Bill 450, which 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.



# FY 2018-19 OBJECTIVES

- Clerk-Recorder Program

- Pursue updating the Documentary Tax Ordinance to clarify and include recent changes from the legislature regarding the tax.
- Pursue standardizing indexing practices with other counties, creating a new training manual, and providing training for the staff.
- Implement a new website for the Clerk-Recorder with expanded content and additional accessibility for users such as translation into Spanish and compatibility with mobile devices and 508 standards.
- Digitize Real Estate records from 1961-1969 for improved quality of copy images.



# FY 2018-19 OBJECTIVES

- Assessor Program

- Review an estimated 9,000 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 1<sup>st</sup> tax lien date, by June 30<sup>th</sup> as part of the assessment roll.
- Perform timely resolution of assessment appeals within the statutory timeframe while adequately defending the disputed roll value at risk.
- Complete Phase 3 on the Maps Module and Change of Ownership Module modernizing the Assessor Property System (APS).
- Complete Phases 5 and 6 on the Title Transfer Module modernizing the APS.



# PERFORMANCE MEASURES - ELECTIONS

DESCRIPTION	2015-16 ACTUAL	2016-17 ACTUAL	2017-18 EST. ACTUAL	2018-19 RECOMMENDED
Number of voter registration transactions (adds, deletes, and changes) processed for the fiscal year	<b>126,711</b>	<b>115,930</b>	<b>85,000</b>	<b>90,000</b>
Total voter registration in the scheduled statewide election	<b>201,865</b>	<b>222,983</b>	<b>230,000</b>	<b>276,000</b>
Percentage and number of Permanent Vote by Mail voters	<b>62%</b> 125,156 / 201,865	<b>63%</b> 141,628 / 222,983	<b>60%</b> 138,000 / 230,000	<b>60%</b> 165,600 / 276,000
Total turnout in the scheduled statewide election	<b>59%</b> 118,974 / 201,865	<b>82%</b> 182,264 / 222,983	<b>40%</b> 92,000 / 230,000	<b>60%</b> 165,600 / 276,000
Poll turnout as a percentage of total votes in the scheduled statewide election	<b>32%</b> 38,157 / 118,974	<b>34%</b> 61,652 / 182,264	<b>30%</b> 27,600 / 92,000	<b>35%</b> 57,960 / 165,600





# PERFORMANCE MEASURES - CLERK-RECORDER

DESCRIPTION	2015-16 ACTUAL	2016-17 ACTUAL	2017-18 EST. ACTUAL	2018-19 RECOMMENDED
Percentage and number of official documents recorded and indexed the same day	<b>100%</b> 79,418	<b>100%</b> 84,056	<b>100%</b> 70,000	<b>100%</b> 70,000
Percentage and number of documents recorded electronically (E-Recorded)	<b>31%</b> 24,317 / 79,418	<b>33%</b> 27,635 / 84,056	<b>34%</b> 23,800 / 70,000	<b>34%</b> 23,800 / 70,000
Number of marriage licenses issued	<b>3,912</b>	<b>4,062</b>	<b>3,850</b>	<b>4,000</b>



# PERFORMANCE MEASURES - ASSESSOR

DESCRIPTION	2015-16 ACTUAL	2016-17 ACTUAL	2017-18 EST. ACTUAL	2018-19 RECOMMENDED
Total number of parcels subject to Prop 8/Section 51 of the Revenue and Taxation Code	<b>16,300</b>	<b>14,200</b>	<b>11,300</b>	<b>9,000</b>
Retention rate and retained value of property under appeal	<b>95%</b> \$1.25 Billion	<b>91%</b> \$1.10 Billion	<b>90%</b> Unknown	<b>90%</b> Unknown



# RENEW '22 | FY 2018-19 IMPLEMENTATION

## **Actions or evaluations that are already underway**

- Elections - Replace Ballot Tabulation and Layout Systems
- Assessor - Complete and implement the Possessory Interest Valuation Program
- Clerk-Recorder - Automate recording of government liens and releases

## **Proposals that are consistent with existing BOS policy or direction**

- Assessor - Work with Agricultural Commissioner's Office and Planning & Development to better coordinate Williamson Act contract compliance



# RENEW '22 | FUTURE YEAR IMPLEMENTATION

- Elections - Continue to research the feasibility and cost-effectiveness of transitioning to all Vote-By-Mail elections
- Clerk-Recorder - Automate processing and issuance of vital copies (birth certificates, death certificates, and marriage licenses)
- Assessor - Continue to rebuild the Assessor's Property Tax System



# FY 2018-19 SERVICE LEVEL REDUCTIONS

**NONE**



# SUMMARY

- Assessor - Magnitude of ongoing operational gap could result in significant service level reductions adversely impacting the assessment roll which provides funding for many county, state, and local agency public services
- Assessor - Continue to rebuild and modernize the Assessor's Property Tax System
- Elections - Purchase and installation of the new Vote Tabulation System
- Clerk-Recorder - Anticipate experiencing continued complications stemming from implementing the Building Homes and Jobs Act (SB 2) as well as reduction in recording volume

