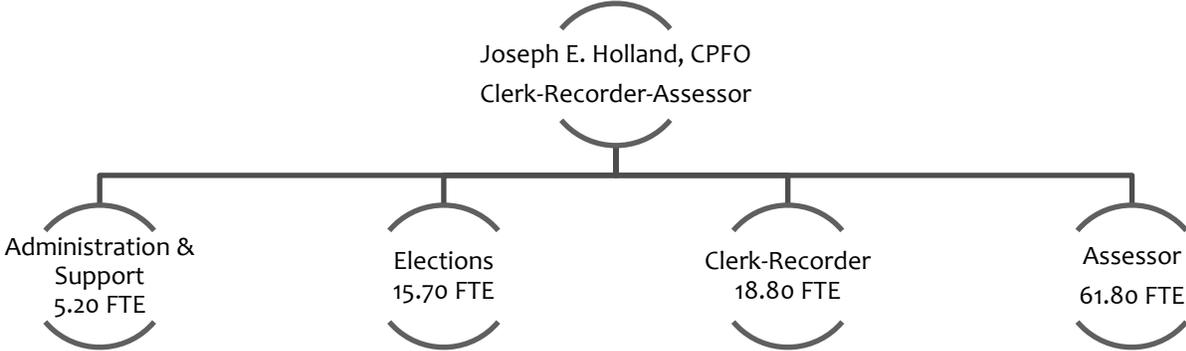


Clerk-Recorder-Assessor



RECOMMENDED BUDGET & STAFFING SUMMARY & BUDGET PROGRAMS CHART

Operating	\$ 18,499,500
Capital	\$ 2,732,500
FTEs	101.5



Clerk-Recorder-Assessor

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 Elections 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 2019-20 OBJECTIVES

- Elections will conduct the Presidential Primary Election.
- Elections will acquire and implement a new vote tabulation system in FY 2019-20.
- Clerk-Recorder will move the Historic Maps library to a more secure environment and catalogue locations into a new system.
- Clerk-Recorder will complete automating the historic birth certificates, which currently reside on microfilm and paper books, decreasing the wait time for customers requesting birth records from the late 1950s.
- Assessor anticipates reviewing an estimated 9,100 parcels subject to Proposition 8/Section 51 of the Revenue and Taxation Code, which requires 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.
- Assessor will continue the process of modernizing the Assessor Property System.

Clerk-Recorder-Assessor

HIGHLIGHTED RENEW '22 INITIATIVES

Already Underway

- Ballot Layout and Vote Tabulation System
 - Received demonstration of voting systems.
 - Finalizing Request for Proposal to begin the formal bid and selection process.
- Voter's Choice Act (VCA) Model of Voting - All Vote-By-Mail Elections with Vote Centers and Ballot Drop Boxes
 - VCA pilot counties identified the planning and implementation phase to be very labor intensive.
 - Preliminary cost estimate—based on current formulas for vote centers and drop boxes—is substantially higher than the cost of the current model of voting in Santa Barbara County.
 - As it continues to be used by other counties through the Presidential Election cycle, Elections will continue to evaluate the VCA model as well as any new technology that can be used to facilitate this model to determine the feasibility of moving to this model in the future.

Implementation in FY 2019-20

- Ballot Layout and Vote Tabulation System
 - Will select and implement a new Ballot Layout and Vote Tabulation System for use beginning with the March 3, 2020 Presidential Primary Election.

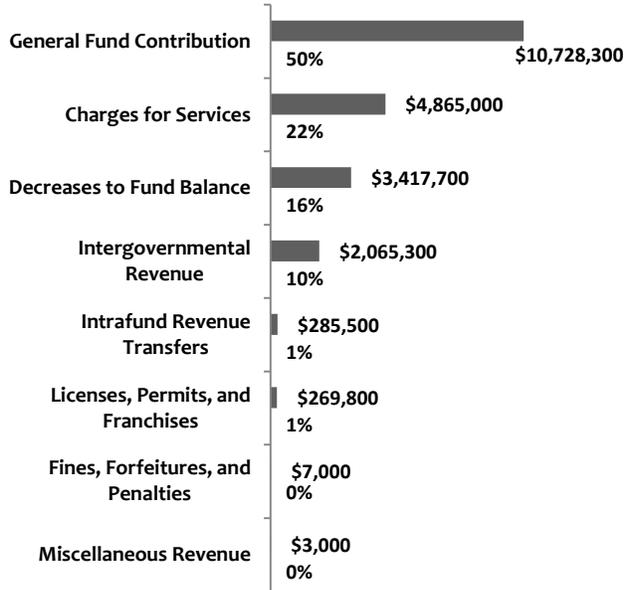
Future Year Implementation

- Voter's Choice Act (VCA) Model of Voting - All Vote-By-Mail Elections with Vote Centers and Ballot Drop Boxes
 - As it continues to be used by other counties through the Presidential Election cycle, Elections will continue to evaluate the VCA model as well as any new technology that can be used to facilitate this model to determine the feasibility of moving to this model in 2024.
 - Legislative changes positively affecting the formulas for the number of vote centers and ballot drop boxes may increase the likelihood of moving to this model.

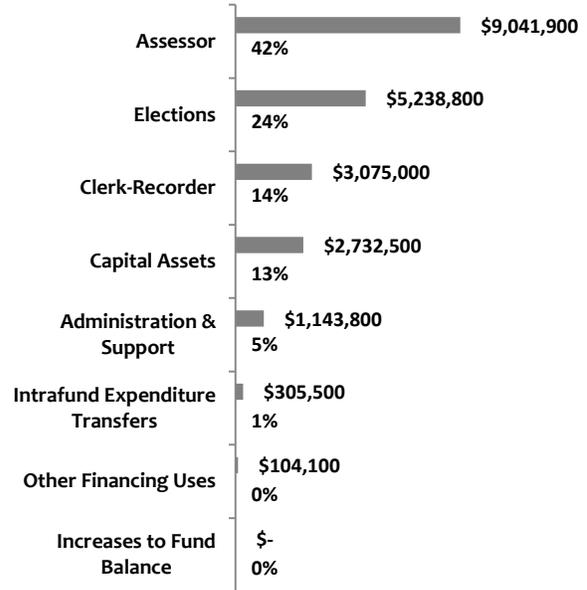
Clerk-Recorder-Assessor

RECOMMENDED SOURCES & USES OF FUNDS

Source of Funds - \$21,641,600

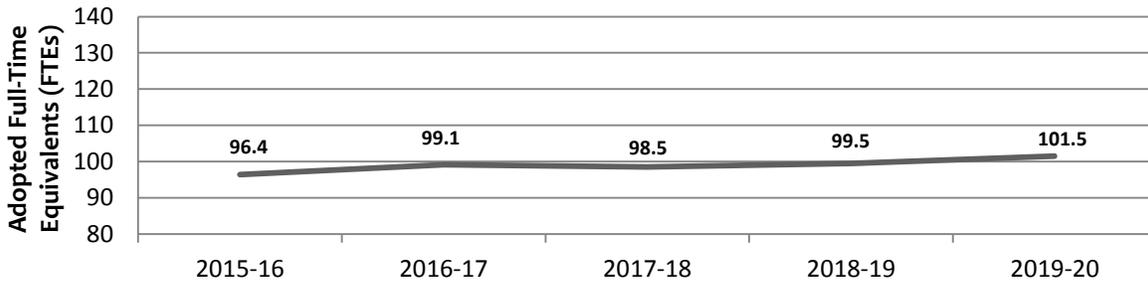


Use of Funds - \$21,641,600



STAFFING TREND

FTE counts include regular staff only, and do not include extra help and contractors-on-payroll.



Clerk-Recorder-Assessor

BUDGET OVERVIEW

Staffing Detail By Budget Program	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
Administration & Support	5.40	5.22	5.22	5.20	(0.01)
Elections	12.31	12.70	12.70	15.70	3.00
Clerk-Recorder	16.28	18.78	18.78	18.80	0.02
Assessor	58.75	62.80	62.80	61.80	(1.00)
Unallocated	0.08	-	-	-	-
Total	92.81	99.50	99.50	101.50	2.00
Budget By Budget Program					
Administration & Support	\$ 1,090,952	\$ 1,111,000	\$ 1,052,200	\$ 1,143,800	\$ 32,800
Elections	3,733,437	4,658,100	3,811,000	5,238,800	580,700
Clerk-Recorder	2,527,066	2,970,300	2,652,300	3,075,000	104,700
Assessor	8,320,533	9,228,700	8,833,200	9,041,900	(186,800)
Total	\$ 15,671,989	\$ 17,968,100	\$ 16,348,700	\$ 18,499,500	\$ 531,400
Budget By Categories of Expenditures					
Salaries and Employee Benefits	\$ 12,230,466	\$ 13,326,100	\$ 12,567,100	\$ 13,598,200	\$ 272,100
Services and Supplies	2,712,724	3,868,900	3,080,200	4,092,300	223,400
Other Charges	728,799	773,100	701,400	809,000	35,900
Total Operating Expenditures	15,671,989	17,968,100	16,348,700	18,499,500	531,400
Capital Assets	103,495	2,625,000	85,000	2,732,500	107,500
Other Financing Uses	207,966	208,200	208,200	104,100	(104,100)
Intrafund Expenditure Transfers (+)	347,894	409,700	1,149,500	305,500	(104,200)
Increases to Fund Balances	161,120	30,100	215,700	-	(30,100)
Fund Balance Impact (+)	786,116	-	-	-	-
Total	\$ 17,278,579	\$ 21,241,100	\$ 18,007,100	\$ 21,641,600	\$ 400,500
Budget By Categories of Revenues					
Licenses, Permits and Franchises	\$ 244,636	\$ 269,800	\$ 269,800	\$ 269,800	\$ -
Fines, Forfeitures, and Penalties	7,323	6,500	6,500	7,000	500
Use of Money and Property	5	-	-	-	-
Intergovernmental Revenue	20,347	2,015,300	20,000	2,065,300	50,000
Charges for Services	5,678,194	5,380,000	5,467,300	4,865,000	(515,000)
Miscellaneous Revenue	74,235	3,000	3,000	3,000	-
Total Operating Revenues	6,024,740	7,674,600	5,766,600	7,210,100	(464,500)
Intrafund Expenditure Transfers (-)	330,280	389,700	105,000	285,500	(104,200)
Decreases to Fund Balances	391,359	2,644,600	1,603,300	3,417,700	773,100
General Fund Contribution	10,532,200	10,532,200	10,532,200	10,728,300	196,100
Total	\$ 17,278,579	\$ 21,241,100	\$ 18,007,100	\$ 21,641,600	\$ 400,500

FTE counts include regular staff only, and do not include extra help and contractors-on-payroll.

Clerk-Recorder-Assessor

CHANGES & OPERATIONAL IMPACT: 2018-19 ADOPTED TO 2019-20 RECOMMENDED

Staffing

- Net increase of 2.0 FTEs due to the addition of two Admin Office Professional positions within the Elections Division funded with existing Services and Supplies budget. There was an offsetting FTE change stemming from the transfer of an EDP Systems and Programming Analyst II from Assessor to Elections.

The Department's budgeted staff has decreased by 17.0 FTEs 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, including the Chief Deputy Assessor in FY 2018-19. The FY 2019-20 Recommended staffing levels remain consistent with budgeted FY 2018-19 levels. 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 \$531,400:
 - +\$272,100 increase in Salaries and Employee Benefits costs to fund 101.5 FTEs, partially offset by an increase in budgeted salary savings.
 - +\$223,400 increase in Services and Supplies primarily in the Elections Division due to:
 - +\$139,800 increase in Printing Expense and Postage Expense for pre-election outreach and pre-election crossover mailings as well as other increases to printing and postage costs.
 - +\$82,000 increase in Postage Expense to address requirements stemming from new legislation, AB 216 Prepaid Postage.
 - +\$35,900 increase in Other Charges primarily driven by an increase to Information and Communications Technology data service charges.
- Net non-operating expenditure decrease of \$130,900:
 - -\$104,200 decrease in Intrafund Expenditure Transfers due to a change in intra-department overhead charges per Office of Management and Budget (OMB) Guidance in 2 CFR Part 200.
 - -\$104,100 decrease in Other Financing Uses due to the payoff of debt owed for the Elections Center Building remodel.
 - -\$30,100 decrease in funds designated for future departmental use primarily due to a downturn in recording fee revenue.
 - +\$107,500 increase in Capital Asset expenditures for the acquisition of servers to securely isolate the Election Division's servers from other County servers.

These changes result in Recommended operating expenditures of \$18,499,500, non-operating expenditures of \$3,142,100, and total expenditures of \$21,641,600. Non-operating expenditures primarily include capital assets, transfers, and other financing uses.

Clerk-Recorder-Assessor

CHANGES & OPERATIONAL IMPACT: 2018-19 ADOPTED TO 2019-20 RECOMMENDED (CONT'D)

Revenues

- Net operating revenue decrease of \$464,500:
 - -\$515,000 net decrease in Charges for Services primarily due to:
 - -\$285,000 decrease in recoverable election costs due to fewer local agencies consolidating for a Presidential Primary Election as opposed to a Gubernatorial General Election.
 - -\$142,800 decrease in administrative revenue generated from SB 2 Building Homes and Jobs Act, which went into effect on January 1, 2018, due to improved staff efficiencies in processing SB 2 transactions.
 - -\$100,000 decrease in Supplemental Tax Admin Fee revenue due to the elimination of a backlog that drove up revenues in recent years.
 - +\$50,000 increase in Intergovernmental Revenue stemming from the Federal Help America Vote Act (HAVA) ADA261 grant (\$25,000) and a California Elections Security grant (\$25,000).
- Net non-operating revenue increase of \$865,000:
 - +\$773,100 net increase in use of fund balances primarily due to:
 - +\$824,700 increase in budgeted use of committed fund balances to balance the Department's operating budget.
 - +\$220,600 increase in budgeted use of restricted Assessor AB 818 fund balance to cover costs associated with modernizing the Assessor's Property Tax System.
 - +\$90,000 decrease in use of Elections Voting Equipment committed fund balance due to the acquisition of new servers to isolate Elections Division's servers from other county servers.
 - +\$51,800 increase in use of restricted fund balances within the Recorder budget program due to the continued downturn in recording fee revenue.
 - -\$74,000 decrease in use of Assessment Appeals Support committed fund balance to fund the new Appraiser II position created to address the large volume of assessment appeals.
 - -\$340,000 decrease in use of one-time Emerging Issues committed fund balance to cover the anticipated surge in election costs stemming from implementation of AB 1461 California New Motor Voter Program.
 - +\$196,100 increase in General Fund Contribution.
 - -\$104,200 decrease in Intrafund Revenue Transfers due to a change in intra-department overhead charges per OMB Guidance in 2 CFR Part 200.

These changes result in Recommended operating revenue of \$7,210,100, non-operating revenues of \$14,431,500, and total sources of \$21,641,600. Non-operating revenues primarily include General Fund Contribution and increases to fund balance component usage.

RELATED LINKS

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

Clerk-Recorder-Assessor

PERFORMANCE MEASURES

Description	FY 2016-17 Actual	FY 2017-18 Actual	FY 2018-19 Estimated Actual	FY 2019-20 Recommend
Administration and Support				
Percent of departmental Employee Performance Reviews (EPRs) completed by the due date.	76%	70%	100%	100%
Elections				
Number of voter registration transactions (adds, deletes, and changes) processed for the Fiscal Year	115,930	90,942	145,000	145,000
Number of Federal, State, and Local Elections conducted in the Fiscal Year	4	3	3	3
Number of VoteCal transactions processed for the Fiscal Year	10,267	15,142	25,000	28,000
Total voter registration in the scheduled statewide election	222,983	206,110	217,417	240,000
Permanent Vote By Mail registration as a percentage of total registration	64%	66%	68%	65%
	141,628	135,511	146,871	156,000
Total turnout in the scheduled statewide election as a percentage of total registration	82%	45%	73%	51%
	182,264	92,919	157,697	122,400
Poll turnout as percentage of total votes in the scheduled statewide election	34%	25%	29%	32%
	61,652	22,978	45,035	39,168
Vote By Mail turnout as percentage of total votes in the scheduled statewide election	66%	75%	71%	68%
	120,612	69,941	112,662	83,232
Clerk Recorder				
Percentage and number of official documents recorded and indexed the same day	100%	100%	100%	100%
	84,056	71,160	70,000	70,000
Percentage and number of documents recorded electronically (E-Recorded)	33%	33%	34%	34%
	27,635	23,570	23,800	23,800
Number of marriage licenses issued	4,062	3,673	3,850	4,000
Assessor				
Total number of parcels subject to Proposition 8/Section 51 of the Revenue and Taxation Code	14,200	12,068	9,600	9,100
Retention rate and retained value of property under appeal	91%	96%	90%	90%
	\$1.10 Billion	\$2.52 Billion	Unknown	Unknown

Clerk-Recorder-Assessor

ADMINISTRATION & SUPPORT BUDGET PROGRAM

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	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
COUNTY CLK-REC-ASSESSOR	1.00	1.00	1.00	1.00	-
CHIEF DEPUTY CLERK-RECORDER	0.05	-	-	-	-
PROGRAM MANAGER	0.01	-	-	-	-
EDP OFFICE AUTO SPEC	0.99	0.81	0.81	0.80	(0.01)
HR MANAGER	1.00	1.00	1.00	1.00	-
ADMN OFFICE PRO	-	-	-	-	-
FISCAL MANAGER	0.44	1.00	1.00	1.00	-
FINANCIAL OFFICE PRO SR	0.65	0.60	0.60	0.60	-
TEAM/PROJECT LDR-GEN	0.44	-	-	-	-
COMPUTER SYSTEMS SPEC	0.81	0.81	0.81	0.80	(0.01)
Total	5.40	5.22	5.22	5.20	(0.01)

FTE counts include regular staff only, and do not include extra help and contractors-on-payroll.

Revenue & Expenditures

Budget By Categories of Expenditures	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
Salaries and Employee Benefits	\$ 1,015,231	\$ 928,300	\$ 932,100	\$ 955,200	\$ 26,900
Services and Supplies	40,184	147,700	86,500	147,700	-
Other Charges	35,537	35,000	33,600	40,900	5,900
Total Operating Expenditures	1,090,952	1,111,000	1,052,200	1,143,800	32,800
Capital Assets	-	50,000	25,000	50,000	-
Total Expenditures	\$ 1,090,952	\$ 1,161,000	\$ 1,077,200	\$ 1,193,800	\$ 32,800
Budget By Categories of Revenues					
Miscellaneous Revenue	63	-	-	-	-
Total Operating Revenues	63	-	-	-	-
Intrafund Expenditure Transfers (-)	330,280	389,700	-	285,500	(104,200)
General Fund Contribution	832,915	771,300	1,077,200	908,300	137,000
Total Revenues	\$ 1,163,258	\$ 1,161,000	\$ 1,077,200	\$ 1,193,800	\$ 32,800

2018-19 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.

2019-20 Objectives

- Prepare, monitor, and execute a FY 2019-20 Budget in support of the Department's FY 2019-20 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

ELECTIONS BUDGET PROGRAM

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	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
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	1.01	1.00	1.00	1.00	-
PROJECT MANAGER	0.01	-	-	-	-
EDP OFFICE AUTO SPEC	0.01	-	-	-	-
EDP SYS & PROG ANLST SR	-	-	-	1.00	1.00
EDP SYS & PROG ANLST	0.34	0.50	0.50	0.50	-
ASSESSMENT SUPERVISOR	0.03	-	-	-	-
ADMN OFFICE PRO	2.00	2.00	2.00	4.00	2.00
FISCAL MANAGER	0.01	-	-	-	-
DEPT BUS SPEC	1.50	2.00	2.00	2.00	-
MAPPING/GIS ANALYST	0.37	0.20	0.20	0.20	-
APPRAISER	0.04	-	-	-	-
ADMN OFFICE PRO SR	5.98	6.00	6.00	6.00	-
Total	<u>12.31</u>	<u>12.70</u>	<u>12.70</u>	<u>15.70</u>	<u>3.00</u>

FTE counts include regular staff only, and do not include extra help and contractors-on-payroll.

Revenue & Expenditures

Budget By Categories of Expenditures	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
Salaries and Employee Benefits	\$ 1,849,234	\$ 1,942,600	\$ 1,699,600	\$ 2,374,800	\$ 432,200
Services and Supplies	1,720,145	2,530,600	1,947,000	2,682,300	151,700
Other Charges	164,059	184,900	164,400	181,700	(3,200)
Total Operating Expenditures	<u>3,733,437</u>	<u>4,658,100</u>	<u>3,811,000</u>	<u>5,238,800</u>	<u>580,700</u>
Capital Assets	103,495	2,530,000	30,000	2,637,500	107,500
Other Financing Uses	207,966	208,200	208,200	104,100	(104,100)
Intrafund Expenditure Transfers (+)	14,114	20,000	14,500	20,000	-
Total Expenditures	<u>\$ 4,059,012</u>	<u>\$ 7,416,300</u>	<u>\$ 4,063,700</u>	<u>\$ 8,000,400</u>	<u>\$ 584,100</u>
Budget By Categories of Revenues					
Intergovernmental Revenue	20,347	2,015,300	20,000	2,065,300	50,000
Charges for Services	108,595	355,000	555,000	70,000	(285,000)
Miscellaneous Revenue	31,365	-	-	-	-
Total Operating Revenues	<u>160,308</u>	<u>2,370,300</u>	<u>575,000</u>	<u>2,135,300</u>	<u>(235,000)</u>
Decreases to Fund Balances	-	932,200	172,500	682,200	(250,000)
General Fund Contribution	4,450,738	4,113,800	3,316,200	5,182,900	1,069,100
Total Revenues	<u>\$ 4,611,046</u>	<u>\$ 7,416,300</u>	<u>\$ 4,063,700</u>	<u>\$ 8,000,400</u>	<u>\$ 584,100</u>

Clerk-Recorder-Assessor

ELECTIONS BUDGET PROGRAM (CONT'D)

2018-19 Anticipated Accomplishments

- Successfully conducted the Montecito Fire Protection District Special Election and the 2018 Gubernatorial General Election.
- Successfully completed a project to update the website making it more accessible to all voters and incorporated suggestions and feedback on accessible layout and functionality from the Santa Barbara County Voting Accessibility Advisory Committee and staff from the Braille Institute.
- Completed the evaluation and selection process of a new vote tabulation system certified by the California Voting Systems Standards.
- Continued to evaluate the viability and cost-effectiveness of conducting all-mailed ballot elections under SB 450 Voter's Choice Act and determined the Division does not currently have the necessary staffing resources to successfully implement.

2019-20 Objectives

- Conduct the Presidential Primary Election.
- Acquire and implement a new vote tabulation system in FY 2019-20.
- Evaluate the impact of conditional voter registration and ways to further streamline and expedite the process.
- Begin the process to fulfill the requirements of the county elections official under recently passed Measure G2018 (County Ordinance 5051) to form an eleven-member Citizens' Independent Redistricting Commission.

Clerk-Recorder-Assessor

CLERK-RECORDER BUDGET PROGRAM

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	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
CHIEF DEPUTY CLERK-RECORDER	0.94	1.00	1.00	1.00	-
DIVISION CHIEF	1.00	1.00	1.00	1.00	-
EDP OFFICE AUTO SPEC	-	0.19	0.19	0.20	0.01
EDP SYS & PROG ANLST	0.66	0.50	0.50	0.50	-
ADMN OFFICE PRO	9.29	11.50	11.50	12.50	1.00
FISCAL MANAGER	0.02	-	-	-	-
FINANCIAL OFFICE PRO SR	0.33	0.40	0.40	0.40	-
ADMN OFFICE PRO SR	4.03	4.00	4.00	3.00	(1.00)
TEAM/PROJECT LDR-GEN	0.02	-	-	-	-
COMPUTER SYSTEMS SPEC	-	0.19	0.19	0.20	0.01
Total	16.28	18.78	18.78	18.80	0.02

FTE counts include regular staff only, and do not include extra help and contractors-on-payroll.

Revenue & Expenditures

Budget By Categories of Expenditures	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
Salaries and Employee Benefits	\$ 1,909,051	\$ 2,218,900	\$ 2,053,600	\$ 2,250,800	\$ 31,900
Services and Supplies	463,577	588,900	447,200	647,400	58,500
Other Charges	154,438	162,500	151,500	176,800	14,300
Total Operating Expenditures	2,527,066	2,970,300	2,652,300	3,075,000	104,700
Capital Assets	-	25,000	10,000	25,000	-
Intrafund Expenditure Transfers (+)	333,780	389,700	-	285,500	(104,200)
Increases to Fund Balances	161,120	30,100	215,700	-	(30,100)
Total Expenditures	\$ 3,021,966	\$ 3,415,100	\$ 2,878,000	\$ 3,385,500	\$ (29,600)
Budget By Categories of Revenues					
Licenses, Permits and Franchises	244,636	269,800	269,800	269,800	-
Fines, Forfeitures, and Penalties	7,323	6,500	6,500	7,000	500
Charges for Services	2,474,489	2,456,900	2,297,900	2,375,000	(81,900)
Miscellaneous Revenue	4,159	3,000	3,000	3,000	-
Total Operating Revenues	2,730,607	2,736,200	2,577,200	2,654,800	(81,400)
Intrafund Expenditure Transfers (-)	-	-	105,000	-	-
Decreases to Fund Balances	291,359	678,900	195,800	730,700	51,800
Total Revenues	\$ 3,021,966	\$ 3,415,100	\$ 2,878,000	\$ 3,385,500	\$ (29,600)

Clerk-Recorder-Assessor

CLERK-RECORDER BUDGET PROGRAM (CONT'D)

2018-19 Anticipated Accomplishments

- Updated the Documentary Tax Ordinance to clarify and include recent modifications from the legislature regarding the tax.
- Pursued standardizing indexing practices with other counties, creating a new training manual, and providing training for the staff.
- Implemented a new website for the Clerk-Recorder providing expanded content and additional accessibility for users such as translation into Spanish and compatibility with mobile devices and applicable standards.
- Digitized real estate records from 1961-1969 for improved quality of copy images.
- Updated the historic index legacy system to be web based.
- Completed automating the historic birth certificates, which currently reside on microfilm and paper books, decreasing the wait time for customers requesting birth records from the 1960s.

2019-20 Objectives

- Perform technology upgrades throughout the division.
- Continue to explore and upgrade the Recording System to automate staff processing and create customer self-service options.
- Move the Historic Maps library to a more secure environment and catalogue locations into a new system.
- Complete automating the historic birth certificates, which currently reside on microfilm and paper books, decreasing the wait time for customers requesting birth records from the late 1950s.

The Clerk-Recorder experienced considerable drops in recordings for real estate transactions, which appears to be consistent with other counties throughout California. Much of the decline stems from a few major factors: implementation of a new State law (SB 2 Building Homes and Jobs Act) significantly increasing fees, a natural disaster in Montecito halting issuance of new flood insurance policies, and an overall drop in refinancing of home loans due to growing interest rates.

Clerk-Recorder-Assessor

ASSESSOR BUDGET PROGRAM

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	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
CHIEF DEPUTY ASSESSOR	0.99	1.00	1.00	1.00	-
PROGRAM MANAGER	3.87	4.00	4.00	4.00	-
FINANCIAL SYS ANALYST SR	2.00	2.00	2.00	2.00	-
PROJECT MANAGER	0.92	1.00	1.00	1.00	-
ENTERPRISE LDR-GEN	0.08	-	-	-	-
EDP SYS & PROG ANLST SR	1.96	3.00	3.00	2.00	(1.00)
EDP SYS & PROG ANLST	1.00	1.00	1.00	1.00	-
ASSESSMENT SUPERVISOR	5.97	6.00	6.00	6.00	-
ADMN OFFICE PRO	8.71	11.00	11.00	11.00	-
MAPPING/GIS ANALYST SUPV	1.00	1.00	1.00	1.00	-
MAPPING/GIS ANALYST	2.63	2.80	2.80	1.80	(1.00)
APPRAISER	19.46	20.00	20.00	20.00	-
AUDITOR-APPRAISER	4.31	5.00	5.00	5.00	-
ADMN OFFICE PRO SR	5.37	5.00	5.00	5.00	-
FINANCIAL OFFICE PRO SR	0.02	-	-	-	-
MAPPING/GIS TECH	-	-	-	1.00	1.00
ACCOUNTANT-AUDITOR	0.46	-	-	-	-
Total	<u>58.75</u>	<u>62.80</u>	<u>62.80</u>	<u>61.80</u>	<u>(1.00)</u>

FTE counts include regular staff only, and do not include extra help and contractors-on-payroll.

Revenue & Expenditures

Budget By Categories of Expenditures	2017-18 Actual	2018-19 Adopted	2018-19 Estimated Actual	2019-20 Recommended	Change From FY18-19 Ado to FY19-20 Rec
Salaries and Employee Benefits	\$ 7,456,950	\$ 8,236,300	\$ 7,881,800	\$ 8,017,400	\$ (218,900)
Services and Supplies	488,818	601,700	599,500	614,900	13,200
Other Charges	374,765	390,700	351,900	409,600	18,900
Total Operating Expenditures	<u>8,320,533</u>	<u>9,228,700</u>	<u>8,833,200</u>	<u>9,041,900</u>	<u>(186,800)</u>
Capital Assets	-	20,000	20,000	20,000	-
Intrafund Expenditure Transfers (+)	-	-	1,135,000	-	-
Total Expenditures	<u>\$ 8,320,533</u>	<u>\$ 9,248,700</u>	<u>\$ 9,988,200</u>	<u>\$ 9,061,900</u>	<u>\$ (186,800)</u>
Budget By Categories of Revenues					
Use of Money and Property	5	-	-	-	-
Charges for Services	3,095,109	2,568,100	2,614,400	2,420,000	(148,100)
Miscellaneous Revenue	38,648	-	-	-	-
Total Operating Revenues	<u>3,133,763</u>	<u>2,568,100</u>	<u>2,614,400</u>	<u>2,420,000</u>	<u>(148,100)</u>
Decreases to Fund Balances	100,000	1,033,500	1,235,000	2,004,800	971,300
General Fund Contribution	5,248,547	5,647,100	6,138,800	4,637,100	(1,010,000)
Total Revenues	<u>\$ 8,482,310</u>	<u>\$ 9,248,700</u>	<u>\$ 9,988,200</u>	<u>\$ 9,061,900</u>	<u>\$ (186,800)</u>

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ASSESSOR BUDGET PROGRAM (CONT'D)

2018-19 Anticipated Accomplishments

- Anticipate reviewing roughly 9,600 parcels subject to Proposition 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.
- Reviewed property tax values on properties affected by the Thomas Fire and subsequent debris flow events.
- Continued updating and modernizing the Assessor Property System.
 - Completed Phase 2: Title Transfer Module, Property Assessor Enhancements, and General Inquiry.

2019-20 Objectives

- Review an estimated 9,100 parcels subject to Proposition 8/Section 51 of the Revenue and Taxation Code, which requires 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 the disputed roll value at risk.
- Continue to review property tax values on properties affected by the Thomas Fire and subsequent debris flow events.
- Continue updating and modernizing the Assessor Property System.
 - Complete Phase 3: Maps Module.
 - Complete Phase 4: Change of Ownership Statement Module and Penalty Interface with Auditor.

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