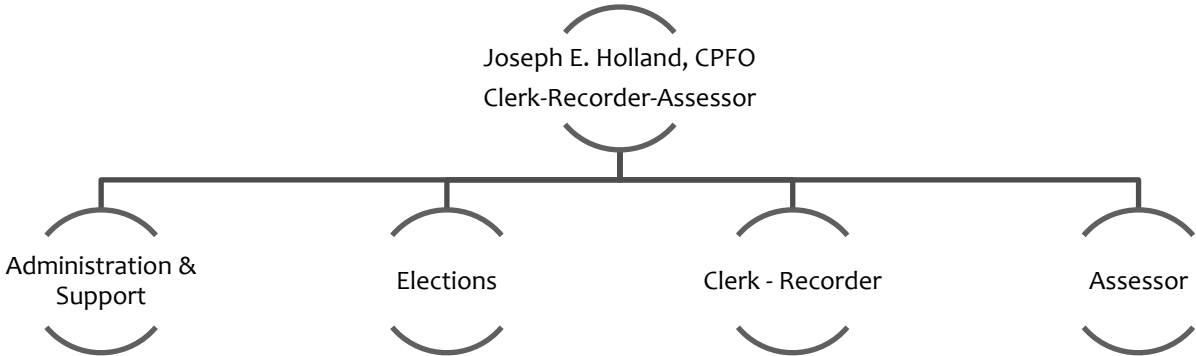


# Clerk-Recorder-Assessor



**BUDGET & FULL-TIME EQUIVALENTS SUMMARY & BUDGET PROGRAMS CHART**

Operating	\$ 16,542,401
Capital	\$ 153,000
FTEs	96.4



# Clerk-Recorder-Assessor

## Department

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### **MISSION STATEMENT**

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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**

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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 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.

### **HIGHLIGHTS OF 2015-17 OBJECTIVES**

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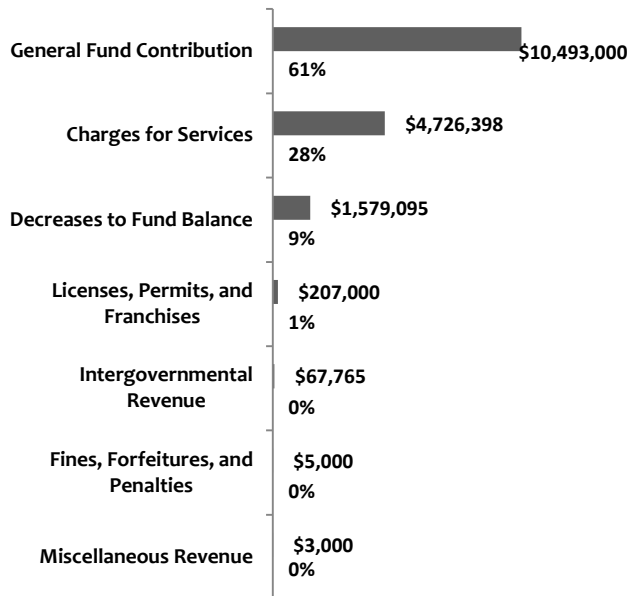
- The Assessor will complete 97% of all assessment work items by close of the annual tax roll, which becomes the base upon which local property taxes are levied, collected, and distributed to cities, the County, and special districts to fund government services.
- The Assessor will initiate the process of updating and modernizing the Assessor Property System with an anticipated completion date of FY 2019-20.
- Elections will conduct the 2016 Primary and General elections as well as a 2016 Retirement Board election.
- Elections, through voter outreach and support, will materially maintain or increase the voter turnout rate related to the last comparable election.
- The Clerk-Recorder will record 70,000 official documents per Fiscal Year and index 100% the same day.
- The Clerk-Recorder will attempt to increase the number of marriage ceremonies performed through community outreach and the continued remodeling and of the Wedding Balcony in the Hall of Records.

# Clerk-Recorder-Assessor

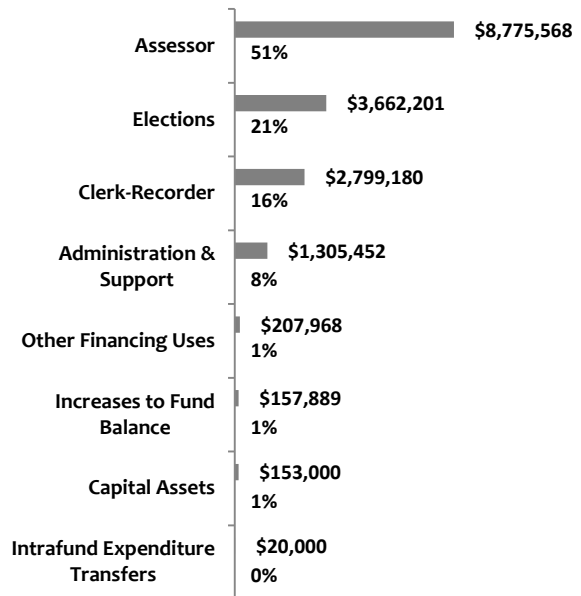
## Department

### RECOMMENDED SOURCES & USES OF FUNDS

#### Source of Funds - \$17,081,258

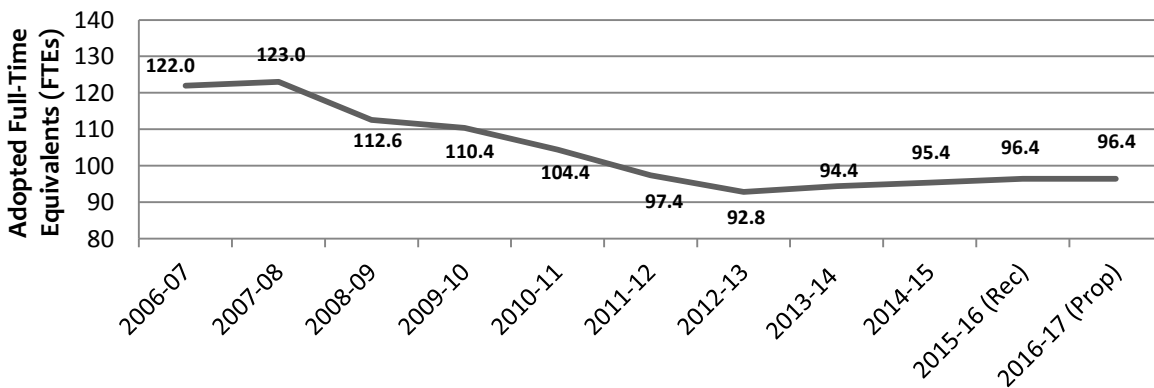


#### Use of Funds - \$17,081,258



### 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	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
Administration & Support	5.42	6.95	(0.15)	6.80	6.80
Elections	13.92	9.06	1.44	10.50	10.50
Clerk-Recorder	18.67	17.94	(0.79)	17.15	17.15
Assessor	55.44	61.42	0.50	61.92	61.92
Total	<u>93.45</u>	<u>95.38</u>	<u>1.00</u>	<u>96.38</u>	<u>96.38</u>
<hr/>					
<b>Budget By Budget Program</b>					
Administration & Support	\$ 1,117,885	\$ 1,295,720	\$ 9,732	\$ 1,305,452	\$ 1,319,983
Elections	2,763,294	3,417,125	245,076	3,662,201	3,638,555
Clerk-Recorder	2,175,702	2,707,458	91,722	2,799,180	2,843,488
Assessor	7,123,161	8,245,095	530,473	8,775,568	8,815,323
Unallocated	804	-	-	-	-
Total	<u>\$ 13,180,846</u>	<u>\$ 15,665,398</u>	<u>\$ 877,003</u>	<u>\$ 16,542,401</u>	<u>\$ 16,617,349</u>
<hr/>					
<b>Budget By Categories of Expenditures</b>					
Salaries and Employee Benefits	\$ 10,351,025	\$ 11,992,417	\$ 675,065	\$ 12,667,482	\$ 12,815,040
Services and Supplies	2,122,189	2,894,879	185,603	3,080,482	2,970,482
Other Charges	707,633	778,102	16,335	794,437	831,827
Total Operating Expenditures	<u>13,180,846</u>	<u>15,665,398</u>	<u>877,003</u>	<u>16,542,401</u>	<u>16,617,349</u>
Capital Assets	260,464	160,000	(7,000)	153,000	153,000
Other Financing Uses	521,531	277,568	(69,600)	207,968	207,968
Intrafund Expenditure Transfers (+)	17,199	20,000	-	20,000	20,000
Increases to Fund Balances	211,145	207,041	(49,152)	157,889	127,640
Fund Balance Impact (+)	650,551	-	-	-	324,634
Total	<u>\$ 14,841,736</u>	<u>\$ 16,330,007</u>	<u>\$ 751,251</u>	<u>\$ 17,081,258</u>	<u>\$ 17,450,591</u>
<hr/>					
<b>Budget By Categories of Revenues</b>					
Licenses, Permits and Franchises	\$ 265,017	\$ 242,000	\$ (35,000)	\$ 207,000	\$ 207,000
Fines, Forfeitures, and Penalties	7,340	12,000	(7,000)	5,000	5,000
Use of Money and Property	1	-	-	-	-
Intergovernmental Revenue	13,486	15,000	52,765	67,765	15,000
Charges for Services	4,734,323	5,171,149	(444,751)	4,726,398	5,494,190
Miscellaneous Revenue	5,202	6,000	(3,000)	3,000	3,000
Total Operating Revenues	<u>5,025,369</u>	<u>5,446,149</u>	<u>(436,986)</u>	<u>5,009,163</u>	<u>5,724,190</u>
Decreases to Fund Balances	193,067	1,099,058	480,037	1,579,095	1,023,601
General Fund Contribution	9,623,300	9,784,800	708,200	10,493,000	10,702,800
Total	<u>\$ 14,841,736</u>	<u>\$ 16,330,007</u>	<u>\$ 751,251</u>	<u>\$ 17,081,258</u>	<u>\$ 17,450,591</u>

# Clerk-Recorder-Assessor

## Department

### **CHANGES & OPERATIONAL IMPACT: 2014-15 ADOPTED TO 2015-16 RECOMMENDED**

#### Staffing

- Staffing increased from 95.4 to 96.4 FTEs resulting from the addition of a Project Manager position, who will oversee the modernization of the Assessor Property System.

The Department's budgeted staff has decreased by 26 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 creating several vacancies within the department. During FY 2014-15 most vacancies have been filled; however, a significant amount of experience was lost. This issue, combined with the sub-optimal FY 2015-16 recommended staffing level continues to impact service delivery of the Department, specifically in the Assessor and Election 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 will continue to experience increases in assessment work backlog. Inadequate staff level in the Elections Program creates inefficiencies and increases risk of errors associated with understaffing critical election functions.

The Department has and will continue to make budget expansion requests for incremental staff increases until an optimal staffing level is achieved.

#### Expenditures

- Net operating expenditure increase of \$877,000:
  - +\$675,000 net increase in Salaries and Employee Benefits costs primarily due to:
    - +391,000 increase due to Cost of Living Adjustments, Retirement and Insurance Benefit cost increases.
    - +160,000 increase due to the addition of the Project Manager position overseeing the modernization of the Assessor Property System.
    - +70,000 increase in Extra Help in the Clerk-Recorder program.
    - +54,000 Overtime expenses associated with the VoteCal project in Elections.
  - +\$186,000 net increase in Services and Supplies primarily due to:
    - +\$99,000 increase in Assessor related services and supplies for the FY 2015-16 cost of modernizing the Assessor Property System.
    - +\$77,000 increase in Assessor related services and supplies for property tax assessment appeal consulting costs.
  - +\$16,000 increase in Other Charges related to an increase in ITD data service charges, which were partially offset by a decrease in Liability insurance.
- Net non-operating expenditure decrease of \$126,000 primarily due to:
  - -\$49,000 reduction in operating revenue surplus designated for future use, due to a reduction in recording fees.
  - -\$70,000 decrease in debt payments due to the Clerk-Recorder's COP debt being paid off in FY 2014-15.

# Clerk-Recorder-Assessor

## Department

### **CHANGES & OPERATIONAL IMPACT: 2014-15 ADOPTED TO 2015-16 RECOMMENDED (CONT'D)**

These changes result in Recommended operating expenditures of \$16,542,000, non-operating expenditures of \$539,000, and total expenditures of \$17,081,000. Non-operating expenditures primarily include capital assets, transfers, and increases to fund balance components.

#### **Revenues**

- Net operating revenue decrease of \$437,000:
  - +53,000 increase in Election grant funds
  - -\$35,000 decrease in Licenses, Permits, and Fees for annual fluctuations in the number of estimated marriage licenses issued.
  - -\$445,000 net decrease in Charges for Services, primarily due to:
    - -\$480,000 decrease in recoverable election costs from local agencies due to FY 2015-16 being a Primary Election with no budgeted local agency consolidation.
    - +\$323,000 increase in property tax and supplemental administration fees (Assessor's Program).
    - -\$287,000 decrease in Clerk-Recorder recording fees from anticipated decrease in document recordings.
- Net non-operating revenue increase of \$1,188,000 primarily due to:
  - +\$480,000 net increase in use of fund balances.
    - +\$259,000 increase in use of Departmental fund balance to fund the development of an upgrade to the Assessor Property System.
    - +\$224,000 increase in use of the Clerk-Recorder restricted fund balances to fund annual fluctuations in program revenues and expenditures.
    - +\$77,000 increase in use of the County's Litigation fund balance to fund appeal consulting costs related to two major property assessment appeals.
    - -80,000 decrease in use of committed fund balances required to fund ongoing operations in the department.
  - +\$708,000 increase in General Fund Contribution.

These changes result in Recommended operating revenue of \$5,009,000, non-operating revenues of \$12,072,000, and total sources of \$17,081,000. Non-operating revenues primarily include General Fund Contribution and decreases to fund balance components.

# Clerk-Recorder-Assessor

## Department

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### ***CHANGES & OPERATIONAL IMPACT: 2015-16 RECOMMENDED TO 2016-17 PROPOSED***

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#### **Expenditures**

The FY 2016-17 Proposed Budget includes no changes in staffing from the FY 2015-16 Recommended Budget; however, there will be a \$148,000 increase in the cost of Salary and Employee Benefits for funding the same level of staff. The Department's General Fund Contribution is anticipated to increase by \$210,000 to cost increases.

#### **Revenues**

Departmental net operating revenue is expected to increase by \$715,000 in FY 2016-17. In the Elections Program, an increase of \$580,000 is anticipated and related to charges for election services to local agencies in the FY 2016-17 General Election. This is partially offset by a decrease of \$53,000 in one time revenue associated with the VoteCal grant program. In the Assessor Program, property tax administration fees are expected to increase by \$188,000. Due to the increase in revenues, primarily associated with a General Election being held in FY 2016-17, a positive Fund Balance Impact of \$325,000 is expected in FY 2016-17. This positive impact could potentially be reserved within the department to offset an expected election revenue decrease in FY 2017-18, a primary election year.

### ***RELATED LINKS***

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

# Clerk-Recorder-Assessor

## Department

### PERFORMANCE MEASURES

Description	FY 2012-13 Actual	FY 2013-14 Actual	FY 2014-15 Estimated Actual	FY 2015-16 Recommend	FY 2016-17 Proposed
<b>Administration and Support</b>					
Percent of departmental Employee Performance Reviews (EPRs) completed by the due date.	Not Used in Prior Years	Not Used in Prior Years	Not Used in Prior Years	100%	100%
<b>Elections</b>					
Number of voter registration transactions (adds, deletes, and changes) processed for the Fiscal Year	156,004	93,773	85,000	110,000	150,000
Number of Federal, State, and Local Elections conducted in the Fiscal Year	1	2	4	1	2
Percentage and number of Permanent Vote By Mail Voters	55% 111,342	57% 110,990	58% 116,409	59% 116,400	57% 117,000
Percentage of and number of registered voters that voted in the statewide election for the Fiscal Year	81% 164,977	38% 73,136	58% 114,106	63% 128,520	82% 167,280
<b>Clerk Recorder</b>					
Percentage and number of official documents recorded and indexed the same day	100% 111,735	100% 78,793	100% 70,000	100% 70,000	100% 70,000
Percentage and number of documents recorded electronically (E-Recorded)	28% 32,332	28% 22,494	29% 20,300	30% 21,000	35% 24,500
Number of marriage licenses issued	3,379	3,942	3,495	3,360	3,360
<b>Assessor</b>					
Percentage of required property tax assessments completed by July 1 <sup>st</sup> each year to provide basis for tax distribution to all property tax receiving entities	100%	96%	97%	97%	97%
Retention rate and retained value of property under appeal	87% \$1.7 Billion	83% \$2.2 Billion	91% \$1.6 Billion	90% Unknown	90% Unknown



**Clerk-Recorder-Assessor**



# 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	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
COUNTY CLK-REC-ASSESSOR	1.00	1.00	-	1.00	1.00
CHIEF DEPUTY CLERK-RECORDER	0.05	-	-	-	-
PROGRAM MANAGER	0.70	0.20	-	0.20	0.20
EDP OFFICE AUTO SPEC	0.81	2.00	(1.00)	1.00	1.00
FISCAL MANAGER	0.41	1.00	-	1.00	1.00
HR MANAGER	1.00	1.00	-	1.00	1.00
FINANCIAL OFFICE PRO	0.84	1.00	(1.00)	-	-
COMPUTER SYSTEMS SPEC	-	-	1.00	1.00	1.00
DEPT BUS SPEC	0.60	0.75	0.25	1.00	1.00
FINANCIAL OFFICE PRO SR	-	-	0.60	0.60	0.60
EXTRA HELP	0.01	-	-	-	-
Total	5.42	6.95	(0.15)	6.80	6.80

#### Revenue & Expenditures

Budget By Categories of Expenditures	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
Salaries and Employee Benefits	\$ 939,292	\$ 1,113,815	\$ 10,661	\$ 1,124,476	\$ 1,136,531
Services and Supplies	149,669	147,700	-	147,700	147,700
Other Charges	28,924	34,205	(929)	33,276	35,752
Total Operating Expenditures	1,117,885	1,295,720	9,732	1,305,452	1,319,983
Capital Assets	-	50,000	-	50,000	50,000
Total Expenditures	\$ 1,117,885	\$ 1,345,720	\$ 9,732	\$ 1,355,452	\$ 1,369,983
<b>Budget By Categories of Revenues</b>					
General Fund Contribution	1,409,497	1,345,720	9,732	1,355,452	1,369,983
Total Revenues	\$ 1,409,497	\$ 1,345,720	\$ 9,732	\$ 1,355,452	\$ 1,369,983

\*Please note that departments are not required to balance their budget at the program level.

#### 2014-15 Anticipated Accomplishments

- Developed and implemented an attainable budget with the least impact on program service levels.
- Coordinated recruitment efforts to fill 18 vacancies this year from staff attrition.

#### 2015-17 Objectives

- Prepare, monitor, and execute a FY 2015-16 Budget in support of the Department's FY 2015-16 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	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
CHIEF DEPUTY CLERK-RECORDER	0.02	-	-	-	-
CHIEF DEPUTY REGISTRAR OF VOTERS	1.00	1.00	-	1.00	1.00
PROGRAM MANAGER	0.99	1.00	-	1.00	1.00
EDP OFFICE AUTO SPEC	0.12	-	-	-	-
EDP SYS & PROG ANLST	0.35	0.46	(0.21)	0.25	0.25
ADMIN OFFICE PRO	7.29	6.60	(4.85)	1.75	1.75
FINANCIAL OFFICE PRO	0.01	-	-	-	-
DEPT BUS SPEC	-	-	2.00	2.00	2.00
MAPPING/GIS ANALYST	0.15	-	-	-	-
APPRAISER	0.03	-	-	-	-
ADMN OFFICE PRO SR	-	-	4.50	4.50	4.50
EXTRA HELP	3.96	-	-	-	-
Total	<u>13.92</u>	<u>9.06</u>	<u>1.44</u>	<u>10.50</u>	<u>10.50</u>

### Revenue & Expenditures

Budget By Categories of Expenditures	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
Salaries and Employee Benefits	\$ 1,437,913	\$ 1,387,181	\$ 228,538	\$ 1,615,719	\$ 1,596,421
Services and Supplies	1,129,256	1,828,442	10,000	1,838,442	1,828,442
Other Charges	196,125	201,502	6,538	208,040	213,692
Total Operating Expenditures	<u>2,763,294</u>	<u>3,417,125</u>	<u>245,076</u>	<u>3,662,201</u>	<u>3,638,555</u>
Capital Assets	232,237	30,000	-	30,000	30,000
Other Financing Uses	207,966	207,966	2	207,968	207,968
Intrafund Expenditure Transfers (+)	13,699	20,000	-	20,000	20,000
Total Expenditures	<u>\$ 3,217,195</u>	<u>\$ 3,675,091</u>	<u>\$ 245,078</u>	<u>\$ 3,920,169</u>	<u>\$ 3,896,523</u>
<b>Budget By Categories of Revenues</b>					
Intergovernmental Revenue	13,486	15,000	52,765	67,765	15,000
Charges for Services	57,745	505,000	(480,000)	25,000	605,000
Total Operating Revenues	<u>71,231</u>	<u>520,000</u>	<u>(427,235)</u>	<u>92,765</u>	<u>620,000</u>
General Fund Contribution	3,383,767	3,155,091	672,313	3,827,404	3,276,523
Total Revenues	<u>\$ 3,454,998</u>	<u>\$ 3,675,091</u>	<u>\$ 245,078</u>	<u>\$ 3,920,169</u>	<u>\$ 3,896,523</u>

\*Please note that departments are not required to balance their budget at the program level.

# Clerk-Recorder-Assessor

## Program

### **ELECTIONS (CONT'D)**

#### **2014-15 Anticipated Accomplishments**

- Successfully conducted the election canvass and certified the election results by the 28<sup>th</sup> day following the November 2014 General Election. Were unable to materially maintain or increase the voter turnout rate related to the last comparable election as a lower overall turnout was seen statewide. Countywide the voter turnout rate was higher than the overall statewide voter turnout rate for the November 2014 election. Will continue towards the goal to materially maintain or increase the rate using voter outreach and support.
- Increased service levels by expanding and improving information available on the Elections website. Added direct links from the homepage in both English and Spanish to access the Secretary of State's online voter registration website. Added a link on the homepage to information on working as a poll worker and an application for County Employees interested in working the election. Also added information on the ballot measures and improved information for Military and Overseas voters on how to obtain and cast a ballot.
- Implemented a new system to provide redacted copies of Campaign Financial Disclosure filings on the Elections website.
- Increased the number of participants in the Student Poll Worker Program from the last comparable election by performing community outreach to local high schools. Seventy-seven students participated in the November 2010 election and 104 participated in the November 2014 election, an increase of 35%.
- Implemented a new Ballot on Demand printing system and an Agilis ballot sorting system. Once these systems have been utilized in a few election cycles, they may create efficiencies and provide cost savings to the County.
- Expanded the Election Officer training program to include a hands-on portion, allowing an opportunity to practice all of the tasks necessary to process voters. The training better prepared the Election Officers for working on Election Day and reduced the potential for errors.

#### **2015-17 Objectives**

- Elections will conduct the 2016 Primary and General elections as well as a 2016 Retirement Board election.
- Elections, through voter outreach and support, will materially maintain or increase the voter turnout rate related to the last comparable election.
- Continue to increase service levels by expanding and improving information available on the Elections website.
- Establish efficient processes and procedures for the implementation of VoteCal, a statewide voter registration database. VoteCal is also utilized for Conditional Voter Registration, and will allow voters to register to vote and vote on the same day, up to and including Election Day.
- Continue to research new vote tabulation systems with a goal to acquire and implement a new system by 2017.

# 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	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
CHIEF DEPUTY CLERK-RECORDER	0.93	1.00	-	1.00	1.00
DIVISION MANAGER	0.69	1.00	-	1.00	1.00
PROGRAM MANAGER	0.01	1.00	-	1.00	1.00
EDP OFFICE AUTO SPEC	0.07	-	-	-	-
FISCAL MANAGER	0.32	-	-	-	-
EDP SYS & PROG ANLST	0.65	0.54	0.21	0.75	0.75
ADMIN OFFICE PRO	11.43	13.40	(3.90)	9.50	9.50
FINANCIAL OFFICE PRO	0.82	1.00	(1.00)	-	-
FINANCIAL OFFICE PRO SR	-	-	0.40	0.40	0.40
ADMN OFFICE PRO SR	-	-	3.50	3.50	3.50
EXTRA HELP	3.74	-	-	-	-
Total	<u>18.67</u>	<u>17.94</u>	<u>(0.79)</u>	<u>17.15</u>	<u>17.15</u>

### Revenue & Expenditures

Budget By Categories of Expenditures	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
Salaries and Employee Benefits	\$ 1,658,509	\$ 2,001,308	\$ 87,969	\$ 2,089,277	\$ 2,126,146
Services and Supplies	384,594	562,570	(250)	562,320	562,320
Other Charges	132,599	143,580	4,003	147,583	155,022
Total Operating Expenditures	<u>2,175,702</u>	<u>2,707,458</u>	<u>91,722</u>	<u>2,799,180</u>	<u>2,843,488</u>
Capital Assets	-	60,000	(7,000)	53,000	53,000
Other Financing Uses	313,565	69,602	(69,602)	-	-
Intrafund Expenditure Transfers (+)	3,500	-	-	-	-
Increases to Fund Balances	211,145	207,041	(49,152)	157,889	127,640
Total Expenditures	<u>\$ 2,703,913</u>	<u>\$ 3,044,101</u>	<u>\$ (34,032)</u>	<u>\$ 3,010,069</u>	<u>\$ 3,024,128</u>
<b>Budget By Categories of Revenues</b>					
Licenses, Permits and Franchises	265,017	242,000	(35,000)	207,000	207,000
Fines, Forfeitures, and Penalties	7,340	12,000	(7,000)	5,000	5,000
Charges for Services	2,412,323	2,492,597	(287,407)	2,205,190	2,205,190
Miscellaneous Revenue	5,202	6,000	(3,000)	3,000	3,000
Total Operating Revenues	<u>2,689,882</u>	<u>2,752,597</u>	<u>(332,407)</u>	<u>2,420,190</u>	<u>2,420,190</u>
Decreases to Fund Balances	193,067	529,550	223,789	753,339	767,398
Total Revenues	<u>\$ 2,882,949</u>	<u>\$ 3,282,147</u>	<u>\$ (108,618)</u>	<u>\$ 3,173,529</u>	<u>\$ 3,187,588</u>

\*Please note that departments are not required to balance their budget at the program level.

# Clerk-Recorder-Assessor

## Program

### **CLERK-RECORDER (CONT'D)**

#### **2014-15 Anticipated Accomplishments**

- Recorded 70,000 official documents and indexed 100% the same day.
- Increased the percentage of marriage ceremonies performed by County Deputy Marriage Commissioners as a percentage of total marriage licenses issued by 21% over the last two Fiscal Years.
- Completed an assessment of archived records, maps, and microfilm, to identify items in need of restoration. As the custodian of records, the Clerk-Recorder is responsible for archiving and preserving document recordings and vital records. This assessment reviewed records dating back to 1850, and identified those in need of restoration.

#### **2015-17 Objectives**

- The Clerk-Recorder will record 70,000 official documents per Fiscal Year and index 100% the same day.
- Increase the number of users that submit documents for recordation using the electronic recording delivery system known as SECURE (Statewide Electronic Courier Universal Recording Environment), creating cost and processing efficiencies to both users and the County. E-recording documents through this system reduces courier and postage costs to the submitters while also allowing for faster notification that documents submitted have been recorded or rejected. Benefits to the County include automation of the cashiering, scanning and return mail functions, while also creating the ability to better measure productivity at each stage of the recording process.
- Increase the number of customers paying for daily recording fees through the use of the County's online payment collection system. Customer benefits include flexibility for payment from multiple bank accounts, access to accounting data, and the ability to generate custom reports. It also creates efficiencies for the County by eliminating the need to handle and tender paper check payments.
- The Clerk-Recorder is in 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.
- The Clerk-Recorder will attempt to increase the number of marriage ceremonies performed through community outreach and the continued remodeling and of the Wedding Balcony in the Hall of Records

# 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	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
CHIEF DEPUTY ASSESSOR	1.00	1.00	-	1.00	1.00
DIVISION MANAGER	0.04	-	-	-	-
PROGRAM MANAGER	2.68	2.80	1.00	3.80	3.80
PROJECT MANAGER	0.46	1.00	-	1.00	1.00
FINANCIAL SYS ANALYST SR	1.54	2.00	-	2.00	2.00
EDP SYS & PROG ANLST SR	2.08	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	5.77	6.00	-	6.00	6.00
ADMIN OFFICE PRO	13.96	17.62	(6.50)	11.12	11.12
FINANCIAL OFFICE PRO	0.33	-	-	-	-
MAPPING/GIS ANALYST	2.85	3.00	-	3.00	3.00
APPRAISER	16.82	18.00	-	18.00	18.00
AUDITOR-APPRAISER	5.00	5.00	-	5.00	5.00
ADMN OFFICE PRO SR	-	-	5.00	5.00	5.00
FINANCIAL OFFICE PRO SR	-	-	1.00	1.00	1.00
EXTRA HELP	0.92	-	-	-	-
Total	55.44	61.42	0.50	61.92	61.92

#### Revenue & Expenditures

Budget By Categories of Expenditures	2013-14 Actual	2014-15 Adopted	Change from FY14-15 Ado to FY15-16 Rec	2015-16 Recommended	2016-17 Proposed
Salaries and Employee Benefits	\$ 6,314,505	\$ 7,490,113	\$ 347,897	\$ 7,838,010	\$ 7,955,942
Services and Supplies	458,670	356,167	175,853	532,020	432,020
Other Charges	349,985	398,815	6,723	405,538	427,361
Total Operating Expenditures	7,123,161	8,245,095	530,473	8,775,568	8,815,323
Capital Assets	28,227	20,000	-	20,000	20,000
Total Expenditures	\$ 7,151,388	\$ 8,265,095	\$ 530,473	\$ 8,795,568	\$ 8,835,323
<b>Budget By Categories of Revenues</b>					
Use of Money and Property	1	-	-	-	-
Charges for Services	2,264,255	2,173,552	322,656	2,496,208	2,684,000
Total Operating Revenues	2,264,256	2,173,552	322,656	2,496,208	2,684,000
Decreases to Fund Balances	-	569,508	256,248	825,756	256,203
General Fund Contribution	4,830,036	5,283,989	26,155	5,310,144	6,056,294
Total Revenues	\$ 7,094,292	\$ 8,027,049	\$ 605,059	\$ 8,632,108	\$ 8,996,497

\*Please note that departments are not required to balance their budget at the program level.

# Clerk-Recorder-Assessor

## Program

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### **ASSESSOR (CONT'D)**

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#### **2014-15 Anticipated Accomplishments**

- Completed 97% of all secured and unsecured assessment work items by close of the annual tax roll (July 1) to create the assessment roll, which becomes the base upon which local property taxes are levied, collected and distributed to the cities, County and special districts to fund government services.
- 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.

#### **2015-17 Objectives**

- The Assessor will complete 97% of all assessment work items by close of the annual tax roll, which becomes the base upon which local property taxes are levied, collected, and distributed to cities, the County and special districts to fund government services.
- Perform timely resolution of assessment appeals within the statutory timeframe while adequately defending the disputed roll value at risk.
- Complete 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.
- The Assessor will initiate the process of updating and modernizing the Assessor Property System with an anticipated completion date of FY 2019-20.