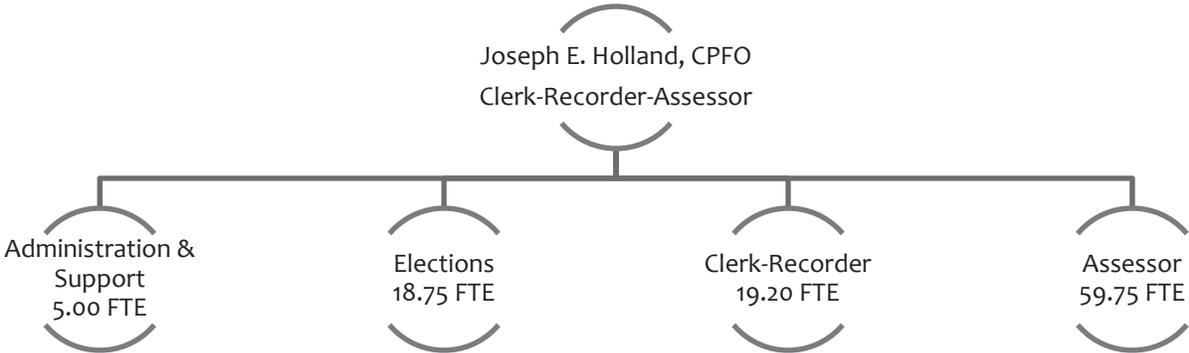


Clerk-Recorder-Assessor



RECOMMENDED BUDGET & STAFFING SUMMARY & BUDGET PROGRAMS CHART

| | |
|-----------|---------------|
| Operating | \$ 19,196,400 |
| Capital | \$ 125,000 |
| FTEs | 102.5 |



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 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 2020-21 OBJECTIVES

- Elections will conduct 2020 Presidential General Election and any local elections as requested by local agencies.
- Once the 2020 census data has been used to draw new district boundaries, Elections will conduct a process to redraw all precinct boundaries, evaluate and potentially relocate polling places, and evaluate language requirements.
- Clerk-Recorder will train staff to become proficient with the new Eagle Recorder system.
- Clerk-Recorder will conduct cost analysis and time studies for each Clerk-Recorder service to determine if new fees are required due to procedural changes stemming from the implementation of Eagle Recorder.
- The Assessor anticipates reviewing an estimated 8,300 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.
- The Assessor will continue the process of modernizing the Assessor Property System.

Clerk-Recorder-Assessor

HIGHLIGHTED RENEW 2022 INITIATIVES

Already Underway

- Ballot Layout and Vote Tabulation System
 - Initial purchase completed.
 - Evaluating additional equipment needs with any subsequent purchases deemed necessary to be completed prior to expiration of HAVA funding on June 30, 2021 and California Secretary of State funding on June 30, 2022.
- 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.
 - Division does not currently have the necessary staffing resources to successfully implement.
 - As it continues to be used by other counties through the current Presidential Election cycle, the Division will continue to evaluate the VCA model as well as any new technology that can be used to facilitate it to determine the feasibility of moving to this model in the future.
- New Possessory Interest Database
 - Completed during FY 2019-20.
 - System used for possessory interest valuations for 2019 Assessment Roll (current closed roll).
 - System used for possessory interest valuations for 2020 Assessment Roll (current working roll).
- Rebuild of Assessor Property Tax System
 - Underlying database completed and deployed in August 2019.
 - Title Transfer Module completed, beta tested, and successfully deployed into production on August 30, 2019.
 - Incorporated General Inquiry Module and retired the legacy General Inquiry in August 2019.
 - Change in Ownership Statement Module completed, beta tested, and deployed into production in February 2020.
 - Change in Ownership Statement Penalty-Assessor interface with Auditor to be completed by June 30, 2020.
 - Change in Ownership Statement Penalty Abatement Resolution (Res # 20-18) drafted and adopted by the Board of Supervisors in February 2020.
 - Maps Module in early developmental stages.

Implementation in FY 2020-21

- Continued rebuild and modernization of Assessor Property Tax System

Clerk-Recorder-Assessor

RENEW 2022 BIG PICTURE GOALS

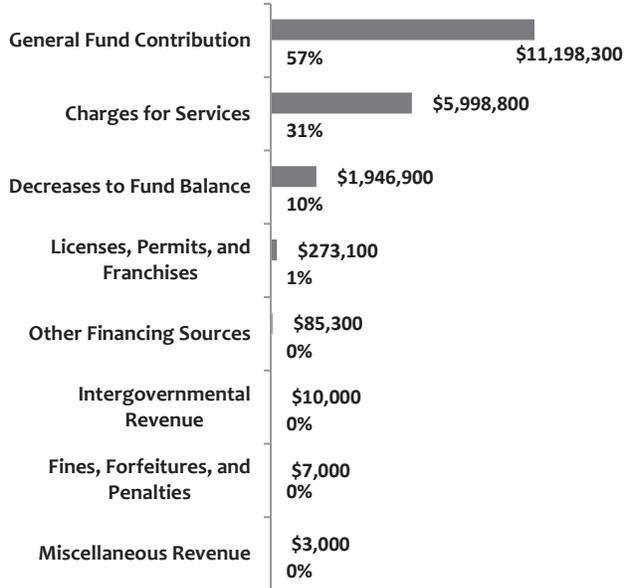
Clerk-Recorder-Assessor will implement the following initiatives in FY 2020-21 to achieve the 6 countywide Big Picture Goals:

| Big Picture Goal | FY 2020-21 Initiatives |
|--|---|
| RE-DESIGN | |
| Evaluate and migrate County services online | <ul style="list-style-type: none">• Elections seeking to move all fee services--excluding candidate filing--to an online system• Elections provides access to an online voter information self-lookup• Clerk-Recorder's move to Eagle Recorder enables applications and other request forms to be made available online• Clerk-Recorder is looking to replace paper forms using kiosks or the web• Assessor looking to create an online exemption filing process• Assessor looking to create an online filing process for annual possessory interest reporting |
| Train County employees in County-provided process improvement training | <ul style="list-style-type: none">• Not applicable for FY 2020-21 |
| RE-BALANCE | |
| Enhance financial resiliency | <ul style="list-style-type: none">• Clerk-Recorder's move to Eagle Recorder will dramatically increase automation functionality resulting in staffing efficiencies within the Division in addition to savings on annual system maintenance costs• Assessor is implementing an auto scanning feature integrated with their document management system eliminating manual scanning by staff |
| RESPOND | |
| Conduct an external customer or client satisfaction survey | <ul style="list-style-type: none">• Clerk-Recorder will create feedback forms and make them available online as well as at Santa Barbara and Santa Maria Clerk-Recorder offices |
| RETAIN | |
| Facilitate the participation of managers in a leadership development program | <ul style="list-style-type: none">• The Department generally looks to promote from within and utilizes an internal leadership development program• An Assessor Division Manager is participating in the 2020 Leadership Certificate Program |
| Retain new employees during their first 5 years of employment | <ul style="list-style-type: none">• The Department offers the opportunity for upward mobility within Divisions as well as transfers between Divisions and throughout the County providing staff with a variety of pathways for career development• The Assessor and Elections Divisions offer paid continuing education providing staff with resources to enhance and diversify their skillsets |

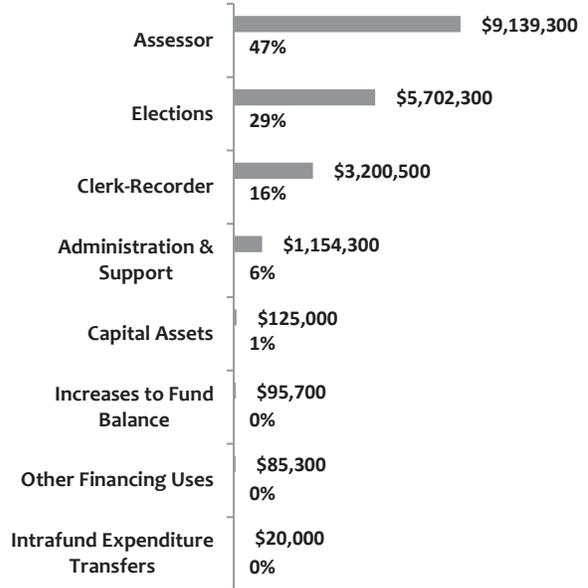
Clerk-Recorder-Assessor

RECOMMENDED SOURCES & USES OF FUNDS

Source of Funds - \$19,522,400

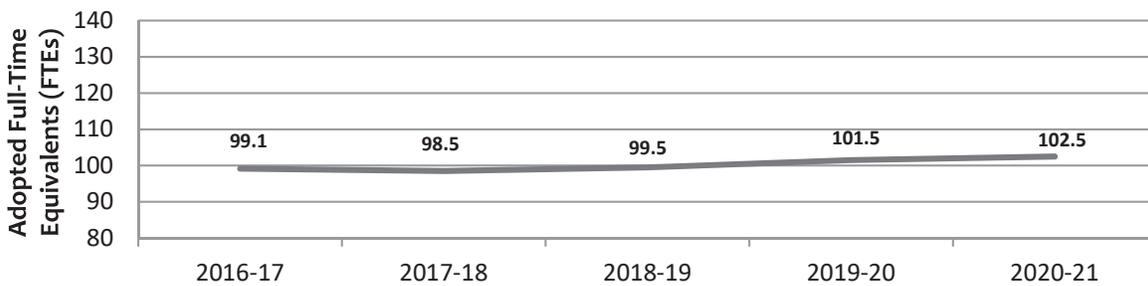


Use of Funds - \$19,522,400



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 | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|---|---------------------------|----------------------------|---|--------------------------------|---|
| Administration & Support | 5.62 | 5.20 | 5.20 | 5.00 | (0.20) |
| Elections | 11.80 | 15.70 | 15.70 | 18.75 | 3.05 |
| Clerk-Recorder | 15.98 | 18.80 | 18.80 | 19.00 | 0.20 |
| Assessor | 57.01 | 61.80 | 61.80 | 59.75 | (2.05) |
| Total | 90.41 | 101.50 | 101.50 | 102.50 | 1.00 |
| Budget By Budget Program | | | | | |
| Administration & Support | \$ 1,182,451 | \$ 1,143,800 | \$ 1,207,700 | \$ 1,154,300 | \$ 10,500 |
| Elections | 3,992,846 | 5,238,800 | 5,218,100 | 5,702,300 | 463,500 |
| Clerk-Recorder | 2,564,909 | 3,075,000 | 2,902,500 | 3,200,500 | 125,500 |
| Assessor | 8,495,328 | 9,041,900 | 8,751,400 | 9,139,300 | 97,400 |
| Total | \$ 16,235,534 | \$ 18,499,500 | \$ 18,079,700 | \$ 19,196,400 | \$ 696,900 |
| Budget By Categories of Expenditures | | | | | |
| Salaries and Employee Benefits | \$ 12,395,997 | \$ 13,598,200 | \$ 13,400,900 | \$ 13,968,000 | \$ 369,800 |
| Services and Supplies | 3,123,792 | 4,092,300 | 3,802,800 | 4,155,400 | 63,100 |
| Other Charges | 715,745 | 809,000 | 876,000 | 1,073,000 | 264,000 |
| Total Operating Expenditures | 16,235,534 | 18,499,500 | 18,079,700 | 19,196,400 | 696,900 |
| Capital Assets | 133,998 | 3,352,500 | 1,491,200 | 125,000 | (3,227,500) |
| Other Financing Uses | 209,437 | 104,100 | 389,600 | 85,300 | (18,800) |
| Intrafund Expenditure Transfers (+) | 1,539,155 | 305,500 | 20,000 | 20,000 | (285,500) |
| Increases to Fund Balances | 263,015 | - | 118,800 | 95,700 | 95,700 |
| Fund Balance Impact (+) | 218,604 | - | - | - | - |
| Total | \$ 18,599,742 | \$ 22,261,600 | \$ 20,099,300 | \$ 19,522,400 | \$ (2,739,200) |
| Budget By Categories of Revenues | | | | | |
| Licenses, Permits and Franchises | \$ 231,773 | \$ 269,800 | \$ 269,800 | \$ 273,100 | \$ 3,300 |
| Fines, Forfeitures, and Penalties | 7,120 | 7,000 | 7,000 | 7,000 | - |
| Use of Money and Property | 4 | - | - | - | - |
| Intergovernmental Revenue | 41,937 | 2,065,300 | 829,200 | 10,000 | (2,055,300) |
| Charges for Services | 5,636,675 | 4,865,000 | 5,459,500 | 5,998,800 | 1,133,800 |
| Miscellaneous Revenue | 15,358 | 3,000 | 3,000 | 3,000 | - |
| Total Operating Revenues | 5,932,866 | 7,210,100 | 6,568,500 | 6,291,900 | (918,200) |
| Other Financing Sources | - | - | 285,500 | 85,300 | 85,300 |
| Intrafund Expenditure Transfers (-) | 494,700 | 285,500 | - | - | (285,500) |
| Decreases to Fund Balances | 1,639,976 | 4,037,700 | 2,517,000 | 1,946,900 | (2,090,800) |
| General Fund Contribution | 10,532,200 | 10,728,300 | 10,728,300 | 11,198,300 | 470,000 |
| Total | \$ 18,599,742 | \$ 22,261,600 | \$ 20,099,300 | \$ 19,522,400 | \$ (2,739,200) |

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

Clerk-Recorder-Assessor

CHANGES & OPERATIONAL IMPACT: 2019-20 ADOPTED TO 2020-21 RECOMMENDED

Staffing

- Net increase of 1.0 FTEs due to the addition of an Department Business Specialist I (1.0 FTE) funded by a one-time release of Committed Assessment Appeals Support fund balance. This position will be dedicated to succession planning within the Department's Information Systems division that primarily services the Assessor Property Tax System.

The Department's budgeted staff has decreased by 16.0 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 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 \$696,900:
 - +\$369,800 increase in Salaries and Employee Benefits costs to fund 102.5 FTEs, including the addition of a 1.0 FTE Department Business Specialist to address succession planning.
 - +\$264,000 increase in Other Charges driven by an increase in Information Technology Department data service charges and Liability Insurance as well as the addition of an internal Postage charge.
 - +\$63,100 increase in Services and Supplies primarily in the Elections division due to the occurrence of a General Election versus a Primary Election.
- Net non-operating expenditure decrease of \$3,436,100:
 - -\$3,227,500 decrease in Capital Asset expenditures due to the completed acquisition and installation of a multiple equipment and software purchases including a new vote tabulation system, new servers to isolate Elections from the rest of the county, and a new recording and information management system for the Clerk-Recorder.
 - -\$285,500 decrease in Intrafund Expenditure Transfers due to moving the Clerk-Recorder into a Special Revenue Fund eliminating the need for this transfer.

These changes result in Recommended operating expenditures of \$19,196,400, non-operating expenditures of \$326,000, and total expenditures of \$19,522,400. Non-operating expenditures primarily include capital assets, other financing uses, and increases to fund balance components.

Clerk-Recorder-Assessor

CHANGES & OPERATIONAL IMPACT: 2019-20 ADOPTED TO 2020-21 RECOMMENDED (CONT'D)

Revenues

- Net operating revenue decrease of \$918,200:
 - -\$2,055,300 decrease in Intergovernmental Revenue due to the completed acquisition and installation of a new vote tabulation system.
 - +\$1,133,800 net increase in Charges for Services due to:
 - +\$585,000 increase in recoverable election costs from local agencies due to the holding of a Presidential General Election in FY 2020-21 involving larger local agency consolidation.
 - +\$393,800 increase in Recording Fee revenue stemming from better-than-expected FY 2019-20 revenues that are expected to remain consistent in FY 2020-21.
 - +\$155,000 increase in expected Property Tax Administration Fee revenue and Supplemental Tax Administration Fee revenue.
- Net non-operating revenue decrease of \$1,821,000:
 - -\$2,090,800 net increase in use of fund balances primarily due to:
 - -\$1,051,400 decrease in budgeted use of Restricted Clerk-Recorder fund balances due to the completed acquisition and implementation of a new recording and information management system as well as better-than-expected Recording Fee revenues.
 - -\$622,200 decrease in use of Elections Voting Equipment fund balance due to the completed acquisition and installation of a new vote tabulation system and server system.
 - -\$417,200 decrease in use committed fund balances to balance the Department's operating budget.
 - -\$285,500 decrease in Intrafund Revenue Transfers due to moving the Clerk-Recorder into a Special Revenue Fund eliminating the need for this transfer.
 - +\$470,000 increase in General Fund Contribution.

These changes result in Recommended operating revenue of \$6,291,900 non-operating revenues of \$13,230,500, and total sources of \$19,522,400. Non-operating revenues primarily include General Fund Contribution and decreases to fund balance components.

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

PERFORMANCE MEASURES

| Description | FY 2017-18 Actual | FY 2018-19 Actual | FY 2019-20 Estimated Actual | FY 2020-21 Recommend |
|--|----------------------|----------------------|-----------------------------------|-------------------------|
| Administration and Support | | | | |
| Percent of departmental Employee Performance Reviews (EPRs) completed by the due date. | 70% | 66% | 100% | 100% |
| Elections | | | | |
| Number of voter registration transactions (adds, deletes, and changes) processed for the Fiscal Year | 90,942 | 128,422 | 120,000 | 120,000 |
| Number of Federal, State, and Local Elections conducted in the Fiscal Year | 3 | 2 | 4 | 1 |
| Number of VoteCal transactions processed for the Fiscal Year | 15,142 | 22,482 | 20,000 | 25,000 |
| Total voter registration in the scheduled statewide election | 206,110 | 217,417 | 226,923 | 265,000 |
| Permanent Vote By Mail registration as a percentage of total registration | 66% | 68% | 73% | 70% |
| | 135,511 | 146,871 | 166,357 | 185,500 |
| Total turnout in the scheduled statewide election as a percentage of total registration | 45% | 73% | 55% | 83% |
| | 92,919 | 157,697 | 125,000 | 219,950 |
| Poll turnout as percentage of total votes in the scheduled statewide election | 25% | 29% | 32% | 40% |
| | 22,978 | 45,035 | 39,168 | 87,980 |
| Vote By Mail turnout as percentage of total votes in the scheduled statewide election | 75% | 71% | 68% | 60% |
| | 69,941 | 112,662 | 83,232 | 131,970 |
| Clerk Recorder | | | | |
| Percentage and number of official documents recorded and indexed the same day | 100% | 100% | 100% | 100% |
| | 71,160 | 64,024 | 82,000 | 83,000 |
| Percentage and number of documents recorded electronically (E-Recorded) | 34% | 36% | 50% | 60% |
| | 24,441 | 23,045 | 41,000 | 50,000 |
| Number of marriage licenses issued | 3,673 | 3,546 | 3,691 | 3,800 |
| Assessor | | | | |
| Total number of parcels subject to Proposition 8/Section 51 of the Revenue and Taxation Code | 12,068 | 9,664 | 8,700 | 8,300 |
| Retention rate and retained value of property under appeal | 96% | 80% | 85% | 85% |
| | \$2.52 Billion | \$3.13 Billion | \$1.5 Billion | 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 | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|-----------------------------------|-------------------|--------------------|--------------------------------|------------------------|--|
| COUNTY CLK-REC-ASSESSOR | 1.00 | 1.00 | 1.00 | 1.00 | - |
| EDP OFFICE AUTO SPEC | 0.96 | 0.80 | 0.80 | 1.00 | 0.20 |
| HR MANAGER | 1.00 | 1.00 | 1.00 | 1.00 | - |
| FISCAL MANAGER | 0.95 | 1.00 | 1.00 | 1.00 | - |
| FINANCIAL OFFICE PRO SR | 0.72 | 0.60 | 0.60 | - | (0.60) |
| COMPUTER SYSTEMS SPEC | 1.00 | 0.80 | 0.80 | 1.00 | 0.20 |
| Total | 5.62 | 5.20 | 5.20 | 5.00 | (0.20) |

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

Revenue & Expenditures

| Budget By Categories of Expenditures | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|---|-------------------|--------------------|--------------------------------|------------------------|--|
| Salaries and Employee Benefits | \$ 1,081,378 | \$ 955,200 | \$ 960,800 | \$ 958,900 | \$ 3,700 |
| Services and Supplies | 69,251 | 147,700 | 207,700 | 147,700 | - |
| Other Charges | 31,823 | 40,900 | 39,200 | 47,700 | 6,800 |
| Total Operating Expenditures | 1,182,451 | 1,143,800 | 1,207,700 | 1,154,300 | 10,500 |
| Capital Assets | - | 50,000 | 25,000 | 50,000 | - |
| Total Expenditures | \$ 1,182,451 | \$ 1,193,800 | \$ 1,232,700 | \$ 1,204,300 | \$ 10,500 |
| Budget By Categories of Revenues | | | | | |
| Other Financing Sources | - | - | 285,500 | - | - |
| Intrafund Expenditure Transfers (-) | 389,700 | 285,500 | - | - | (285,500) |
| General Fund Contribution | 771,300 | 908,300 | 947,200 | 1,204,300 | 296,000 |
| Total Revenues | \$ 1,161,000 | \$ 1,193,800 | \$ 1,232,700 | \$ 1,204,300 | \$ 10,500 |

Clerk-Recorder-Assessor

ADMINISTRATION & SUPPORT BUDGET PROGRAM (CONT'D)

2019-20 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.

2020-21 Objectives

- Prepare, monitor, and execute a FY 2020-21 Budget in support of the Department's FY 2020-21 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 | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|-----------------------------------|-------------------|--------------------|--------------------------------|------------------------|--|
| CHIEF DEPUTY CLERK-RECORDER | 0.01 | - | - | - | - |
| CHIEF DEPUTY REGISTRAR OF VOTERS | 1.00 | 1.00 | 1.00 | 1.00 | - |
| PROGRAM MANAGER | 1.06 | 1.00 | 1.00 | 1.05 | 0.05 |
| EDP OFFICE AUTO SPEC | 0.04 | - | - | - | - |
| EDP SYS & PROG ANLST SR | - | 1.00 | 1.00 | 1.00 | - |
| EDP SYS & PROG ANLST | 0.46 | 0.50 | 0.50 | 0.50 | - |
| ASSESSMENT SUPERVISOR | 0.03 | - | - | - | - |
| ADMN OFFICE PRO | 2.00 | 4.00 | 4.00 | 7.00 | 3.00 |
| FISCAL MANAGER | 0.01 | - | - | - | - |
| DEPT BUS SPEC | 1.00 | 2.00 | 2.00 | 3.00 | 1.00 |
| MAPPING/GIS ANALYST | 0.12 | 0.20 | 0.20 | 0.20 | - |
| APPRAISER | 0.05 | - | - | - | - |
| ADMN OFFICE PRO SR | 6.00 | 6.00 | 6.00 | 5.00 | (1.00) |
| FINANCIAL OFFICE PRO SR | 0.01 | - | - | - | - |
| Total | 11.80 | 15.70 | 15.70 | 18.75 | 3.05 |

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

Revenue & Expenditures

| Budget By Categories of Expenditures | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|---|-------------------|--------------------|--------------------------------|------------------------|--|
| Salaries and Employee Benefits | \$ 1,847,130 | \$ 2,374,800 | \$ 2,382,300 | \$ 2,701,900 | \$ 327,100 |
| Services and Supplies | 1,958,253 | 2,682,300 | 2,642,500 | 2,758,400 | 76,100 |
| Other Charges | 187,464 | 181,700 | 193,300 | 242,000 | 60,300 |
| Total Operating Expenditures | 3,992,846 | 5,238,800 | 5,218,100 | 5,702,300 | 463,500 |
| Capital Assets | - | 2,637,500 | 811,200 | - | (2,637,500) |
| Other Financing Uses | 209,437 | 104,100 | 104,100 | 85,300 | (18,800) |
| Intrafund Expenditure Transfers (+) | 14,455 | 20,000 | 20,000 | 20,000 | - |
| Total Expenditures | \$ 4,216,738 | \$ 8,000,400 | \$ 6,153,400 | \$ 5,807,600 | \$ (2,192,800) |
| Budget By Categories of Revenues | | | | | |
| Intergovernmental Revenue | 41,937 | 2,065,300 | 829,200 | 10,000 | (2,055,300) |
| Charges for Services | 526,383 | 70,000 | 85,000 | 655,000 | 585,000 |
| Miscellaneous Revenue | 1,865 | - | - | - | - |
| Total Operating Revenues | 570,185 | 2,135,300 | 914,200 | 665,000 | (1,470,300) |
| Other Financing Sources | - | - | - | 85,300 | 85,300 |
| Decreases to Fund Balances | - | 682,200 | 164,100 | 60,000 | (622,200) |
| General Fund Contribution | 4,113,800 | 5,182,900 | 5,075,100 | 4,997,300 | (185,600) |
| Total Revenues | \$ 4,683,985 | \$ 8,000,400 | \$ 6,153,400 | \$ 5,807,600 | \$ (2,192,800) |

Clerk-Recorder-Assessor

ELECTIONS BUDGET PROGRAM (CONT'D)

2019-20 Anticipated Accomplishments

- Successfully conducted the candidate filing and appointment in lieu of election process for the Santa Rita Hills Community Services District.
- Conducted the SBCERS Retirement Board Election and a Special Vacancy Election for the SBCERS Retirement Board, the 2020 Presidential Primary Election, and the San Antonio Basin Water District Formation Election.
- Successfully completed the contract award, acquisition, and implementation of a new ballot layout and vote tabulation system.
 - The new system provides advanced technology and high-speed tabulation functionality.
 - This system will be used for the first time in the March 3, 2020 Presidential Primary Election.
- Evaluated the impact of Conditional Voter Registration on the three Elections Office locations and the impact of Same Day Registration being offered at all polling place locations on Election Day.
 - The Santa Maria Elections Office was temporarily relocated to the Board of Supervisors Hearing Room and lobby as the existing office location is too small to accommodate the number of voters on Election Day.
 - Additional resources were added to all three Elections Office locations and polling place locations and the process was streamlined to better serve voters.
- Completed project to survey all existing and potential polling place locations in accordance with the accessibility guidelines provided by the Secretary of State's office and created an evaluation system to determine which locations would best serve voters.

2020-21 Objectives

- Conduct the Presidential General Election and any approved local elections as requested by local agencies.
- Once the 2020 census data has been used to draw new district boundaries, conduct a process to redraw all precinct boundaries, evaluate and potentially relocate polling places, and evaluate language requirements.

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 | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|-----------------------------------|-------------------|--------------------|--------------------------------|------------------------|--|
| CHIEF DEPUTY CLERK-RECORDER | 0.99 | 1.00 | 1.00 | 1.00 | - |
| DIVISION CHIEF | 1.00 | 1.00 | 1.00 | 1.00 | - |
| EDP OFFICE AUTO SPEC | - | 0.20 | 0.20 | - | (0.20) |
| EDP SYS & PROG ANLST | 0.54 | 0.50 | 0.50 | 0.50 | - |
| ADMN OFFICE PRO | 10.10 | 12.50 | 12.50 | 12.50 | - |
| FISCAL MANAGER | 0.04 | - | - | - | - |
| ADMN OFFICE PRO SR | 3.04 | 3.00 | 3.00 | 3.00 | - |
| FINANCIAL OFFICE PRO SR | 0.27 | 0.40 | 0.40 | 1.00 | 0.60 |
| COMPUTER SYSTEMS SPEC | - | 0.20 | 0.20 | - | (0.20) |
| Total | 15.98 | 18.80 | 18.80 | 19.00 | 0.20 |

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

Revenue & Expenditures

| Budget By Categories of Expenditures | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|---|-------------------|--------------------|--------------------------------|------------------------|--|
| Salaries and Employee Benefits | \$ 1,864,586 | \$ 2,250,800 | \$ 2,191,600 | \$ 2,231,300 | \$ (19,500) |
| Services and Supplies | 553,222 | 647,400 | 512,400 | 736,400 | 89,000 |
| Other Charges | 147,101 | 176,800 | 198,500 | 232,800 | 56,000 |
| Total Operating Expenditures | 2,564,909 | 3,075,000 | 2,902,500 | 3,200,500 | 125,500 |
| Capital Assets | - | 645,000 | 645,000 | 55,000 | (590,000) |
| Other Financing Uses | - | - | 285,500 | - | - |
| Intrafund Expenditure Transfers (+) | 389,700 | 285,500 | - | - | (285,500) |
| Increases to Fund Balances | 263,015 | - | 118,800 | 95,700 | 95,700 |
| Total Expenditures | \$ 3,217,624 | \$ 4,005,500 | \$ 3,951,800 | \$ 3,351,200 | \$ (654,300) |
| Budget By Categories of Revenues | | | | | |
| Licenses, Permits and Franchises | 231,773 | 269,800 | 269,800 | 273,100 | 3,300 |
| Fines, Forfeitures, and Penalties | 7,120 | 7,000 | 7,000 | 7,000 | - |
| Charges for Services | 2,423,960 | 2,375,000 | 2,777,500 | 2,768,800 | 393,800 |
| Miscellaneous Revenue | 6,349 | 3,000 | 3,000 | 3,000 | - |
| Total Operating Revenues | 2,669,202 | 2,654,800 | 3,057,300 | 3,051,900 | 397,100 |
| Intrafund Expenditure Transfers (-) | 105,000 | - | - | - | - |
| Decreases to Fund Balances | 443,422 | 1,350,700 | 894,500 | 299,300 | (1,051,400) |
| Total Revenues | \$ 3,217,624 | \$ 4,005,500 | \$ 3,951,800 | \$ 3,351,200 | \$ (654,300) |

Clerk-Recorder-Assessor

CLERK-RECORDER BUDGET PROGRAM (CONT'D)

2019-20 Anticipated Accomplishments

- Implemented the new Eagle Recorder recording system by Tyler Technologies, Inc., which will replace the current recording and cashiering system.
 - The new system will have more automated workflows, web processing capabilities, and includes data conversion of over forty-five years of data.
- Documented major service procedures, performed legislative analysis of required duties, and proposed workflow enhancements to improve processing times.
 - Improvements included digital forms that import into databases, automated form letters that populate from databases, digital certification instead of manual stamps and signatures, and automated reports to staff and customers via auto-scheduled emails (proposed improvements will be implemented in the new Eagle Recorder System scheduled to go live in May 2020).
- Moved to Heartland Credit Card services providing an opportunity to integrate with Eagle Recorder for faster processing times leading to shorter customer wait times, automated processing for customer accounts with recurring payments, and enhanced digital reporting features.

2020-21 Objectives

- Train staff to become proficient with the new Eagle Recorder system.
- Once staff becomes proficient with Eagle Recorder, conduct cost analysis and time studies for each Clerk-Recorder service to determine if new fees are required due to procedural changes stemming from the implementation of Eagle Recorder.

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 | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|-----------------------------------|-------------------|--------------------|--------------------------------|------------------------|--|
| CHIEF DEPUTY ASSESSOR | 0.37 | 1.00 | 1.00 | 1.00 | - |
| PROGRAM MANAGER | 3.94 | 4.00 | 4.00 | 3.95 | (0.05) |
| FINANCIAL SYS ANALYST SR | 2.00 | 2.00 | 2.00 | 2.00 | - |
| PROJECT MANAGER | 1.00 | 1.00 | 1.00 | 1.00 | - |
| EDP SYS & PROG ANLST SR | 2.00 | 2.00 | 2.00 | 2.00 | - |
| EDP SYS & PROG ANLST | 1.00 | 1.00 | 1.00 | 1.00 | - |
| MAPPING/GIS ANALYST SUPV | 0.85 | 1.00 | 1.00 | 1.00 | - |
| ASSESSMENT SUPERVISOR | 5.97 | 6.00 | 6.00 | 6.00 | - |
| ADMN OFFICE PRO | 8.21 | 11.00 | 11.00 | 10.00 | (1.00) |
| AUDITOR-APPRAISER | 4.89 | 5.00 | 5.00 | 4.00 | (1.00) |
| DEPT BUS SPEC | - | - | - | 1.00 | 1.00 |
| MAPPING/GIS ANALYST | 1.99 | 1.80 | 1.80 | 1.80 | - |
| APPRAISER | 19.47 | 20.00 | 20.00 | 19.00 | (1.00) |
| ADMN OFFICE PRO SR | 4.78 | 5.00 | 5.00 | 5.00 | - |
| MAPPING/GIS TECH | 0.55 | 1.00 | 1.00 | 1.00 | - |
| Total | 57.01 | 61.80 | 61.80 | 59.75 | (2.05) |

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

Revenue & Expenditures

| Budget By Categories of Expenditures | 2018-19 Actual | 2019-20 Adopted | 2019-20 Estimated Actual | 2020-21 Recommended | Change From FY19-20 Ado to FY20-21 Rec |
|---|-------------------|--------------------|--------------------------------|------------------------|--|
| Salaries and Employee Benefits | \$ 7,602,904 | \$ 8,017,400 | \$ 7,866,200 | \$ 8,075,900 | \$ 58,500 |
| Services and Supplies | 543,066 | 614,900 | 440,200 | 512,900 | (102,000) |
| Other Charges | 349,358 | 409,600 | 445,000 | 550,500 | 140,900 |
| Total Operating Expenditures | 8,495,328 | 9,041,900 | 8,751,400 | 9,139,300 | 97,400 |
| Capital Assets | 133,998 | 20,000 | 10,000 | 20,000 | - |
| Intrafund Expenditure Transfers (+) | 1,135,000 | - | - | - | - |
| Total Expenditures | \$ 9,764,326 | \$ 9,061,900 | \$ 8,761,400 | \$ 9,159,300 | \$ 97,400 |
| Budget By Categories of Revenues | | | | | |
| Use of Money and Property | 4 | - | - | - | - |
| Charges for Services | 2,686,331 | 2,420,000 | 2,597,000 | 2,575,000 | 155,000 |
| Miscellaneous Revenue | 7,144 | - | - | - | - |
| Total Operating Revenues | 2,693,479 | 2,420,000 | 2,597,000 | 2,575,000 | 155,000 |
| Decreases to Fund Balances | 1,196,554 | 2,004,800 | 1,458,400 | 1,587,600 | (417,200) |
| General Fund Contribution | 5,647,100 | 4,637,100 | 4,706,000 | 4,996,700 | 359,600 |
| Total Revenues | \$ 9,537,134 | \$ 9,061,900 | \$ 8,761,400 | \$ 9,159,300 | \$ 97,400 |

Clerk-Recorder-Assessor

ASSESSOR BUDGET PROGRAM (CONT'D)

2019-20 Anticipated Accomplishments

- Anticipate reviewing roughly 8,700 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 and deployed into production Phase 2: Title Transfer Module, Property Assessor Enhancements, and General Inquiry.
 - Completed and deployed into production Phase 4: Change of Ownership Statement Module and Penalty Interface with Auditor
 - Began Phase 3: Maps Module

2020-21 Objectives

- Review an estimated 8,300 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 reviewing assessed values on properties still impacted by the Thomas Fire and subsequent debris flow to ensure proper values are captured on the tax roll.
- Continue updating and modernizing the Assessor Property System.
 - Complete Phase 3: Maps Module.
 - Continue to identify any new enhancements or features that would be beneficial to the system and plan for incorporating them should they be deemed feasible and cost effective.

Clerk-Recorder-Assessor

