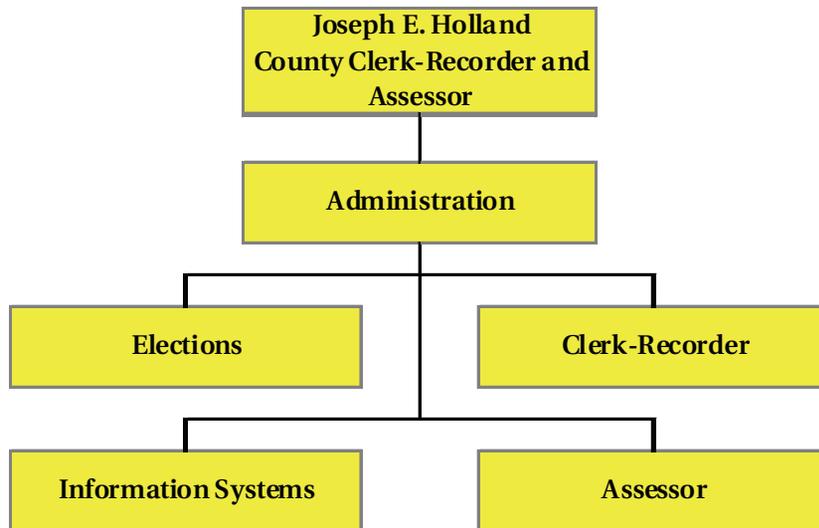
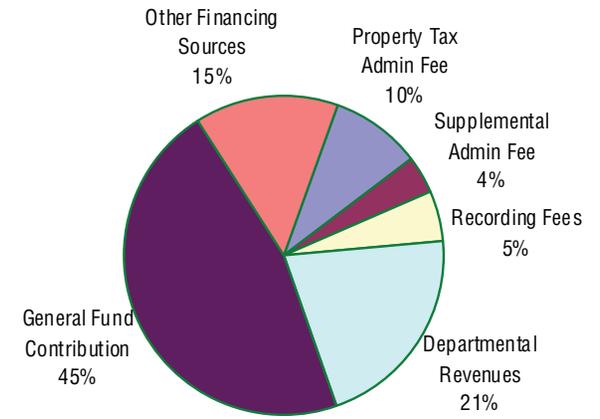


CLERK-RECORDER-ASSESSOR

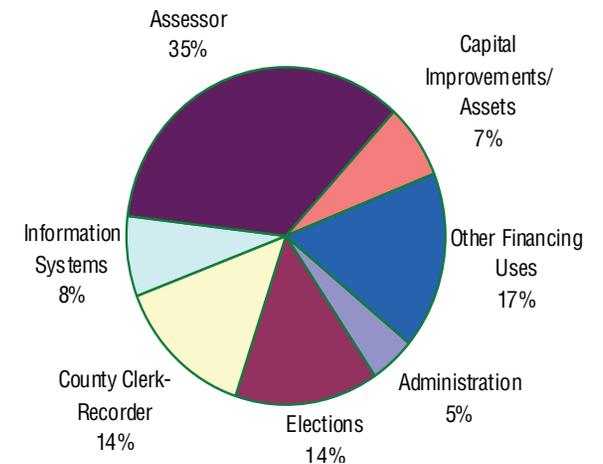
Budget & Positions (FTEs)	
Operating \$	15,217,424
Capital	1,369,432
Positions	110.4 FTEs



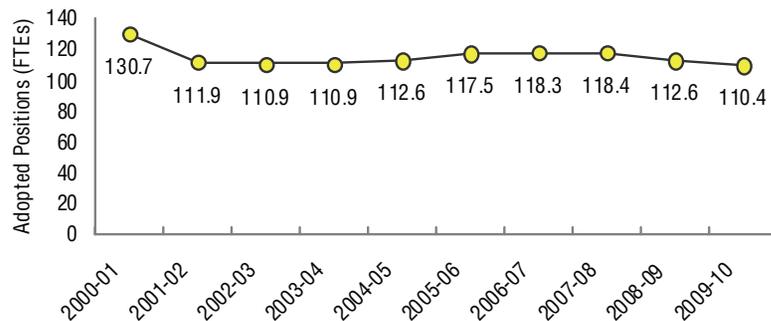
SOURCE OF FUNDS



USE OF FUNDS



STAFFING TREND



CLERK-RECORDER-ASSESSOR

Department Summary

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Use of Funds Summary				
<i>Operating Expenditures</i>				
Administration	\$ 839,647	\$ 863,417	\$ 860,614	\$ 900,971
Elections	5,091,676	3,625,868	5,005,257	2,890,378
County Clerk-Recorder	2,374,976	2,816,520	2,798,037	2,738,169
Information Systems	1,375,895	1,543,804	1,323,847	1,587,481
Assessor	5,986,672	6,790,647	6,268,698	7,100,425
Operating Total	15,668,866	15,640,256	16,256,453	15,217,424
<i>Non-Operating Expenditures</i>				
Capital Assets	146,478	2,258,556	--	1,369,432
Expenditure Total	15,815,344	17,898,812	16,256,453	16,586,856
<i>Other Financing Uses</i>				
Operating Transfers	692,438	938,832	798,983	1,248,487
Designated for Future Uses	935,959	4,550,712	1,151,792	2,151,078
Department Total	\$ 17,443,741	\$ 23,388,356	\$ 18,207,228	\$ 19,986,421

Character of Expenditures

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
<i>Operating Expenditures</i>				
Regular Salaries	\$ 7,499,541	\$ 7,863,853	\$ 7,560,333	\$ 8,142,585
Overtime	189,902	91,755	169,986	42,000
Extra Help	205,723	140,297	129,988	52,000
Benefits	2,758,421	3,553,874	3,307,982	3,533,369
Salaries & Benefits Sub-Total	10,653,587	11,649,779	11,168,289	11,769,954
Services & Supplies	5,015,279	3,990,477	5,088,164	3,447,470
Operating Total	15,668,866	15,640,256	16,256,453	15,217,424
<i>Non-Operating Expenditures</i>				
Capital Assets	146,478	2,258,556	--	1,369,432
Expenditure Total	\$ 15,815,344	\$ 17,898,812	\$ 16,256,453	\$ 16,586,856

Note: Presentation of the individual program amounts for fiscal years 2007-08 and 2008-09 have been adjusted to provide a consistent level of detail with the fiscal year 2009-10 budget, however, the totals for 2007-08 and 2008-09 have not been changed.

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Source of Funds Summary				
<i>Departmental Revenues</i>				
Interest	\$ 33,009	\$ 20,000	\$ 20,000	\$ 5,000
Elections, Federal & State Revenues	378,458	4,443,634	2,186,158	3,109,000
Property Tax Admin Fee	1,455,673	1,700,000	1,925,000	1,900,000
Supplemental Admin Fees	1,036,022	1,000,000	700,000	700,000
Recording Fees	1,189,516	1,020,000	1,020,000	1,091,000
Other Charges for Services	1,085,812	1,136,300	1,397,898	882,300
Miscellaneous Revenue	170,706	167,000	161,531	159,000
Revenue Total	5,349,196	9,486,934	7,410,587	7,846,300
<i>General Fund Contribution</i>				
	9,127,287	9,441,597	9,048,371	9,218,499
<i>Other Financing Sources</i>				
Operating Transfers	34,585	--	--	--
Sale of Property	181,700	--	--	--
Use of Prior Fund Balances	2,750,973	4,459,825	1,748,270	2,921,622
Department Total	\$ 17,443,741	\$ 23,388,356	\$ 18,207,228	\$ 19,986,421

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
	Pos.	FTE	Pos.	FTE

Position Summary

<i>Permanent</i>									
Administration	5.0	5.0	5.0	4.9	5.0	5.0	5.0	5.0	5.0
Elections	18.0	16.9	18.0	11.8	18.0	16.7	18.0	18.0	9.0
County Clerk-Recorder	25.0	21.3	26.0	22.0	26.0	19.8	26.0	21.0	
Information Systems	11.0	8.9	10.0	9.7	10.0	7.8	10.0	9.7	
Assessor	67.0	61.3	67.0	64.3	67.0	58.8	67.0	65.7	
Total Permanent	126.0	113.4	126.0	112.6	126.0	108.1	126.0	110.4	
<i>Non-Permanent</i>									
Contract	--	0.9	--	--	--	0.9	--	--	
Extra Help	--	6.2	--	--	--	5.0	--	--	
Total Positions	126.0	120.5	126.0	112.6	126.0	113.9	126.0	110.4	

Note: FTE and position totals may not sum correctly due to rounding.

MISSION STATEMENT

The mission of the Clerk-Recorder-Assessor Department is to honor the public's trust by assuring honest and open elections, 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.

Budget Organization

The divisions of the Clerk-Recorder-Assessor Department are Administration, Elections, Clerk-Recorder, Information Systems, and Assessor, with a staff equating to 110.4 full time equivalents, net of budgetary salary savings, providing services at three locations in south and north county

Fiscal Year 2009-10 budget constraints require the department to reduce its operating costs, including zero funding for 2.2 fulltime equivalent (FTE) positions, and increasing service fees where allowable by law in order to minimize service level impacts and accommodate workload increases.

The Election Division is expected to absorb budget reductions by reducing operating costs and staff levels equivalent to 2.8 FTE's, potentially impacting services in voter registration and voter outreach programs. Fiscal Year 2008-09 budget constraints are attainable in Elections due to the cyclical nature of election years and having a less resource intensive Gubernatorial Election Year in Fiscal Year 2009-10, compared to Fiscal Year 2008-09 Presidential Election Year.

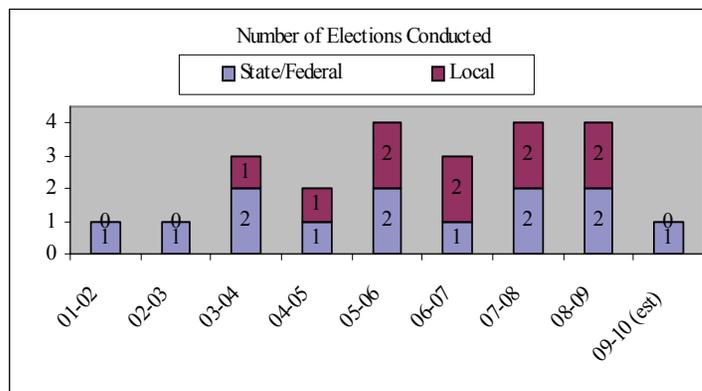
The Clerk-Recorder Division is absorbing budget reductions by reducing operating costs, including the reduction of one FTE position, and by increasing fees for services where allowed by law. Workload in the Division is not expected to fluctuate significantly from the Fiscal Year 2008-09 levels. The division is hopeful that the workload can be absorbed by the reduced level of staffing while only minimally impacting service levels.

In the Assessor functional areas, staff is increasing from the Fiscal Year 2008-09 levels by 1.6 FTE's in order to absorb significantly increased workload and minimize the potential impact to various areas of the property tax process that affect property tax revenues. Current real estate market conditions have caused property values to decrease, thereby increasing Assessor workload. Such market conditions require property values to be monitored and reviewed annually (aka: Section 51's) to ensure that properties are valued at the lower of the factored base value or market value. Such market conditions also significantly increase the number of property appeals filed, which can be very resource intensive to resolve. The inability to maintain Assessor workload would impact timely processing of assessable events and reduce value added to the property tax roll, likely inhibiting property tax revenue generating capabilities.

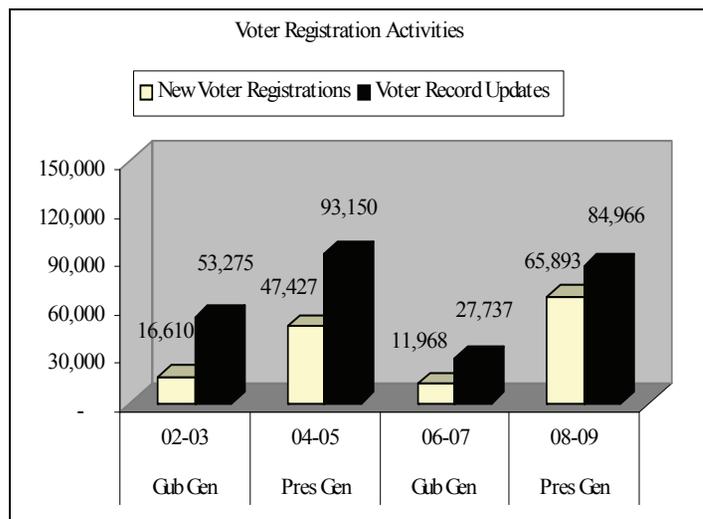
CLERK-RECORDER-ASSESSOR

Department Summary (cont'd)

Activity Indicators



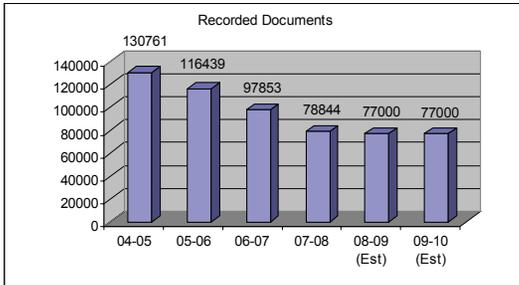
Elections:
Number of elections conducted.



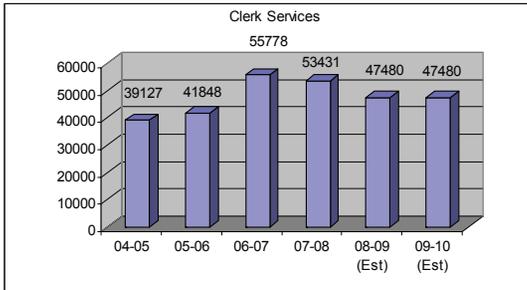
Elections:
Number of new voter registrations and existing voter record updates.

CLERK-RECORDER-ASSESSOR

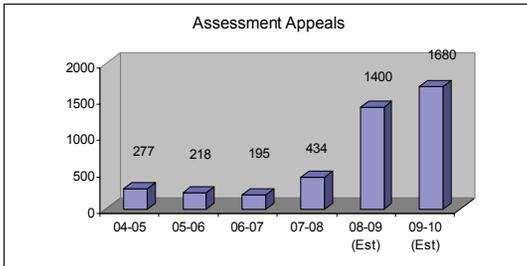
Department Summary (cont'd)



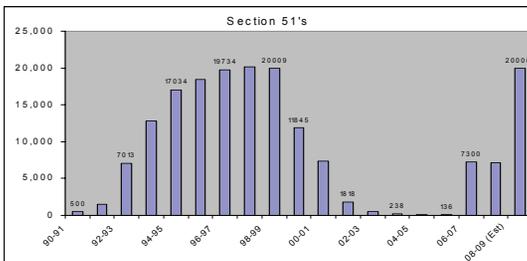
Clerk-Recorder:
Number of recorded documents.



Clerk-Recorder:
Number of clerk services (i.e., marriage licenses, passports, vital record certified copies).



Assessor:
Number of assessment appeals filed.



Assessor:
Number of Section 51 value reductions.

Significant Changes (FY 2008-09 Adopted to FY 2008-09 Estimated Actual)

Operating

The Fiscal Year 2008-09 Estimated Actual operating expenditures increased by \$616,000, to \$16,256,000, from the Fiscal Year 2008-09 Adopted Budget of \$15,640,000. This 4% increase is the result of:

- +\$1,088,000 – Increased costs for the unanticipated May special election called by the State to address budget legislation;
- +\$130,000 – Services and supplies net cost increases in Elections due to a more resource intensive election year than anticipated, driven by increased voter interest and participation for the November 2008 Presidential Election;
- +\$107,000 – Net increases in Recorder automation project expenditures purchased with designated funds;
- -\$380,000 – Decrease in salaries and benefits from department mandatory furlough and health insurance cost savings;
- -\$181,000 – Decreases in salaries and benefits due to staff vacancies held for part of the year from staff turnover and recruitment difficulties;
- -\$47,000 – Department net savings in miscellaneous services and supplies;
- -\$38,000 – Decrease in Recorder Division office supplies, postage, and copier costs;
- -\$33,000 – Decreases in costs from deferral of computer equipment and furniture upgrades and replacements;
- -\$30,000 – Decrease in training and travel expenses in the Information Systems and Assessor Divisions due to increased workload.

The Fiscal Year 2008-09 Estimated Actual operating revenues decreased by \$2,076,000 to \$7,411,000, from the Fiscal Year 2008-09 Adopted Budget of \$9,487,000. This 22% decrease is the result of:

- -\$2,257,000 – Unrealized federal and state election grant reimbursements due to deferral of grant expenditures;
- -\$300,000 – Decrease in supplemental tax administration fees from reduced supplemental property taxes collected;
- -\$140,000 – Decrease in Clerk-Recorder passport fees impacted by reduction in passport requests and further impacted by a drop in the passport fee (from \$30 to \$25) mandated by the Federal Government;
- -\$38,000 – Net decrease in miscellaneous department revenues;
- +\$434,000 – Increase in revenue from recoverable election costs billed to local agencies for participation in the Presidential General Election;
- +\$225,000 – Increase in property tax administration fees.

CLERK-RECORDER-ASSESSOR

Department Summary (cont'd)

Other Financing Uses

The Fiscal Year 2008-09 Estimated Actual other financing uses, decreased by \$3,539,000, to \$1,951,000 from the Fiscal Year 2008-09 Adopted Budget of \$5,490,000. This decrease is the result of:

- -\$1,088,000 – Delay in replenishing the Strategic Reserve with State funds received as reimbursement for the February 2008 Presidential Election. Funds received were re-directed for use in funding the unanticipated May 2009 State Special Election;
- -\$2,307,000 – Federal and State grant funds that would have been designated to fund election equipment expenditures were not received due to deferment of those purchases;
- -\$140,000 – Operating transfers for the Clerk-Recorder Archive Building Project costs were not realized due to construction delays;
- -\$4,000 – The portion of vital records certified copy fees designated for specific uses as prescribed by law decreased due to a reduced volume of certified copies issued.

Capital

The Fiscal Year 2008-09 Estimated Actual capital expenditures decreased by \$2,259,000 to \$0 from the Fiscal Year 2008-09 Adopted Budget of \$2,259,000. This decrease is the result of:

- -\$2,204,000 – Deferment of election equipment and system upgrades pending availability of State certified systems;
- -\$55,000 - Deferment of department server replacements.

Significant Changes (FY 2008-09 Estimated Actual to FY 2009-10 Recommended)

Operating

The Fiscal Year 2009-10 Recommended operating expenditures will decrease by \$1,039,000, to \$15,217,000, from the Fiscal Year 2008-09 Estimated Actual of \$16,256,000. This 6% decrease is the result of:

- -\$1,008,000 – Decrease in services and supplies costs of the May 2009 State Special Election conducted in Fiscal Year 2008-09;
- -\$589,000 – Net decrease in Election Division services and supplies costs, mainly driven by a less resource intensive Gubernatorial election year in Fiscal Year 2009-10, compared to the 2008-09 Presidential election year;
- -\$206,000 – Decrease in extra help and overtime costs driven mainly by the drop in the number of elections from two in Fiscal Year 2008-09, to one in Fiscal Year 2009-10;
- -\$176,000 – Decrease in workers compensation premium costs due to reduction in number of claims over the past five years;
- -\$89,000 – Net decrease in Clerk-Recorder services and supplies, mainly driven by reduction in one-time automation project costs incurred in Fiscal Year 2008-09;

- -\$36,000 – Decrease in Assessor contractor on payroll services;
- +\$21,000 – Net Increase in department miscellaneous costs;
- +\$984,000 – Salaries and benefit increases (net of extra help, overtime, and workers compensation costs) for 110.4 FTE's in Fiscal Year 2009-10 and one-time furlough and health insurance cost savings, offset by staff vacancy savings in Fiscal Year 2008-09. The 110.4 FTE in Fiscal Year 2009-10 includes a decrease of 3.8 FTE's in the Clerk-Recorder and Election functions, increased by 1.6 FTE's in the Assessor function.
- +\$60,000 – Increase in the department's share of computer mainframe operating costs due to other department's migration off the system, placing the full burden of operating costs on the three tax departments.

The Fiscal Year 2009-10 Recommended operating revenue will increase by \$435,000, to \$7,846,000, from the Fiscal Year 2008-09 Estimated Actual of \$7,411,000. This 6% net increase is the result of:

- +\$923,000 – Increase in federal and state reimbursements for funding election equipment purchases and upgrades;
- +\$120,000 – Anticipated increase in Clerk-Recorder service fees from fee increases adopted in February 2009;
- +\$20,000 – Net increase in department miscellaneous revenues;
- -\$628,000 – Decrease in election cost reimbursements from local agencies, impacted by fewer local agencies consolidating in the Fiscal Year 2009-10 Gubernatorial Primary Election, compared to the number of agencies that consolidated with the Fiscal Year 08-09 Presidential General Election.

Use of Prior Fund Balance

The Fiscal Year 2009-10 Recommended use of fund balance will increase by \$1,173,000, to \$2,922,000 from the Fiscal Year 2008-09 Estimated Actual of \$1,748,000. The increase is the result of:

- +\$678,000 – Increase in use of Assessor fund balance to fund staff resources needed to meet Assessor workload;
- +450,000 – Increase in use of Recorder Automation fund balance to fund automation project expenditures;
- +45,000 – Increase in use of Election fund balance to pay for the 25% county match required on election equipment eligible for purchase with Proposition 41 Grant monies.

CLERK-RECORDER-ASSESSOR

Department Summary (cont'd)

Capital

The Fiscal Year 2009-10 Recommended capital expenditures will increase by \$1,369,000, to \$1,369,000 from the Fiscal Year 2008-09 Estimated Actual of \$0. The increase is the result of:

- +\$1,329,000 – Increase in purchase of election equipment and voter system upgrades with State and Federal grant monies.
- +\$40,000 – Purchase of previously deferred server replacements.

Capital Improvement Program costs totalled \$2,104,000, a difference of \$735,000 from the Fiscal Year 2009-10 Adopted capital asset costs of \$1,369,000. The difference is due to a reduction of \$930,000 in the FY 09-10 adopted amount to reflect the revised cost estimate of a new voting system; offset by a cost increase of \$10,000 in the adopted amount for the purchase of the high speed central county system, plus \$185,000 in the 09-10 adopted amounts for smaller capital purchases not included in the Capital Improvement Program.

Departmental Priorities and Their Alignment With County Goals

The Clerk, Recorder, and Assessor's strategic actions primarily align with the following adopted General Goals & Principles: **Goal 1: Efficient and Responsive Government: An Efficient, Professionally Managed Government Able to Anticipate and to Effectively Respond to the Needs of the Community; and Goal 5: Citizen Involvement: A County Government that is Accessible, Open and Citizen-Friendly.**

The emphasis of the Fiscal Year 2009-10 Clerk-Recorder-Assessor Department Budget is to maintain or increase the Department's service levels and absorb workload increases with equal or fewer resources by continuously improving the Department's business systems through cooperation, partnerships and technology.

Assessor Focus Area: Improve the Property Tax Assessment Processes and Systems

Current Year (FY 08-09) Accomplishments:

- Completed 95% of secured and 90% of unsecured Assessor work (excluding section 51's) by May 8, 2009, meeting the prior years' target date of May 9. A timely submitted assessment roll provides property tax revenue information impacting agencies receiving property tax.
- Resolved 98% of 407 appeals filed through 11/30/2007 within one year of taxpayer filing, minimizing effects on the workload and resource allocation impacted by backlogs and minimizing risk of adverse effect on property valuation if appeal is not timely resolved.
- Completed 23,000 Section 51 property valuation reviews for lien date 01/01/2009 that impacted the valuation of 20,000 properties for the 2009-2010 Roll Year. Timely review of Section 51 requests minimizes re-work associated with roll corrections and diminishes the potential for resource intensive appeals that would significantly impact appraiser workload.
- Identified all properties and sent notices to all potential property owners impacted by the Gap Fire and completed re-assessment claims submitted.

- Completed review of all 296 re-assessment claims received for properties impacted by the Tea Fire Disaster providing for property tax relief due to fire damage.
- Completed entering into the Comparative Sales Database, historical property characteristics information for all single family residences and condominiums, thereby improving data availability and on-line access of property information by the public and by staff for valuation purposes.
- Established a secure file transfer protocol site for the transfer of electronic data from building department agencies. Timelier received information allows the Assessor to stay current on assessment work related to building activity and creates greater efficiencies in timely processing of new construction events. Goal is to increase the rate of use by city agencies over the next few years.
- Purchased a document management scanning system (Laserfiche) and implemented bar-coding and scanning of various types of property documents, such as business property statements and homeowner exemption forms. Scanned documents will be centralized into the Laserfiche System by June 2009, thereby providing greater and timelier processing and accessibility of information. Documents scanned and available on-line will eliminate the need to pull and re-file paper based files, allowing more productive use of staff resources.
- Increased by 2-fold the number of Business Property Statements (BPS) electronically filed through the BPS E-File System created in 2006. Of the 14,000 businesses eligible to file on-line, 27% (3,600) filed their returns on-line creating greater processing efficiencies.
- Completed phase two of the Agriculture Preserve Database Project creating the ability to process supplemental billings and generate reports for other departments, the public, and the annual report to the State Board of Equalization, making an otherwise labor intensive process more efficient and improving the overall accuracy of data.
- Deployed and updated the department website to ensure accurate and concise content, facilitate ease of use, and provide improved statistical information for public access.
- Replaced and consolidated two file servers to one centralized server, establishing a less complex environment and providing increased performance and reliability, and fewer points of failure. Additionally, installed and configured an offsite backup server for business recovery that provides backup redundancy at a higher frequency.

Proposed Strategic Actions:

- Complete and submit 95% of secured and 90% of unsecured Assessor work (excluding section 51's) no later than May 8, 2010 to meet or exceed the previous year's target date. A timely submitted assessment roll provides property tax revenue information impacting agencies receiving property tax.
- By May 1, 2010, complete an estimated 28,000 Section 51 property valuation reviews for lien date 01/01/2010, expected to impact valuation of 24,000 properties for 2010-11 Roll Year. Timely reviews minimize re-work associated with roll corrections and minimize the potential for resource intensive property valuation appeals.

CLERK-RECORDER-ASSESSOR

Department Summary (cont'd)

- Continue bar-coding and scanning letters and forms sent to property owners (ie, welfare exemption forms, business property statements, claims for reassessment exclusions, etc) to convert from a paper based system to an on-line system for greater and timelier processing and accessibility of information. Efficiencies gained will allow staff resources to be re-allocated to more critical areas of work.
- Complete a project creating the capability to access and update commercial and residential building records on-line. Currently, these building records are accessed and updated by pulling the paper based file and handwriting in updated information. Creating on-line capability eliminates the need to manually pull and re-file building records for updates and information. Completing this project is a pre-cursor to scanning all other information in the property files.
- After completing the on-line building records project, initiate the scanning of 130,000 commercial and residential property files creating centralized and timelier accessibility of the information by staff for property valuation and public information requests.
- Complete a review of 100% of the sales events that occur in the subsequent roll year (post January 1, 2010) concurrently with current year workload. This action provides the ability to more timely notice property owners with their new assessment due to change in ownership and increases customer responsiveness.
- Continue to evaluate and research solutions for a Computer Aided Mass Appraisal System (CAMA) that would automate a portion of valuation process. This will decrease the amount of resources devoted to the valuation process, thus allowing those resources to be re-directed to absorb workload increases in other areas, such as section 51 reviews and property appeals.
- Exceed the previous year's rate (27%) of Business Property Statements filed electronically through the BPS E-File System.
- Integrate a process into the new Agricultural Preserve Database (AGDB) allowing agricultural appraisers to manage and generate agricultural property forms sent to owners. Currently, these forms are generated through a different system managed and controlled by department information system programmers. Integration centralizes the agriculture property processes into one system, allowing the users (appraisers) to manage the information sent to property owners. Integration also frees up information system programmer's time to work on other critical IS projects.
- Consolidate servers into a less hardware intensive and less complex environment, increasing business recovery response and reducing maintenance.
- Work towards re-engineering or replacing modules in our main property appraisal system (APS) increasing the system's functionality.

Clerk-Recorder Focus Area: Improve work environment for employees and services to customers

Current Year (FY 08-09) Accomplishments:

- Completed a portion of the document truncation project which by law requires omission of the first five digits of a social security number on any official document recorded from 1980. All documents recorded as of January 1, 2009 are examined and truncated going forward. A portion of the backlog of documents from 1980 will be completed by June 2009 with the remaining backlog to be completed in Fiscal Year 2009-10.
- Electronic Recording Projects: The ability to electronically record documents reduces processing time, staff workload, and material costs associated with managing paper copies and manually maintaining databases.
 - Implemented electronic recording with the Franchise Tax Board, processing 150-200 documents per month through electronic recording.
 - Implemented electronic recording of death certificates with the Public Health Department, processing roughly 3,000 death certificates per year. Electronically received information eliminates the need to scan and index the information received, reducing processing time and potentially costs.
- Implemented optical character recognition software to automate and reduce the manual task of document indexing (data entry of document information.) The initial data capture rate of information is 67%, which exceed the initial estimate.
- Completed a comprehensive cost recovery study that realigned fees with costs of providing certain services.

Proposed Strategic Actions:

- Complete truncation (omission) of information from official documents as required by law, for all documents dating back to 1980.
- Implement a Fictitious Business Name System for the Recorder public lobbies, allowing customers filing for a fictitious business name to input information directly into an automated system for retrieval of information by staff. Such a system would eliminate redundancy in the current process which requires a customer to fill out an application that is subsequently entered into the system by staff.
- Increase customer accessibility of information through our website by creating the capability for customers to conduct searches of Fictitious Business Names on-line. Currently this information can only be accessed from the department's lobby computers.
- Establishing and deploy a file transfer protocol (FTP) site for retrieval of official documents and fictitious business name images and indexes. An FTP site will allow greater customers accessibility of information and reduce the amount of time currently spent by staff in retrieving such information for customers.

CLERK-RECORDER-ASSESSOR

Department Summary (cont'd)

- Move archived documents, files, and microfilm to the newly constructed Recorder Archive Building to free up and make more efficient use of space for other processes.
- Create a Domestic Partnership Database within the County's system of official records to automate the archiving and retrieval of this information. Currently, this information is filed and retrieved through an inefficient paper-based system.
- Initiate a project to automate the current process of numbering recorded maps. The current process involves a manual numbering system that is antiquated and time consuming. Automating this process will reduce the amount of time to record a map by approximately 10-15%.
- Establish and implement an Electronic Recording Delivery System (ERDS) pursuant to Assembly Bill 578 known as the Electronic Recording Delivery Act of 2004 (AB578). This will enable the County to improve and modernize its systems of recording and handling real property documents by permitting the delivery, recording, and return of real property documents electronically. The ability to electronically record documents will reduce processing time, staff workload, and material costs associated with managing paper copies and manually maintaining databases.

Elections Focus Area: Maintain the public trust in the election process:

Current Year (FY 08-09) Accomplishments:

- Initiated a project with the General Services Department to determine the feasibility of converting the vacant portion of the Veterans' Administration Building to a centralized Election facility. Conducting three major elections in calendar year 2008 from various election offices reinforced the benefit of having one centralized facility for improved operational efficiencies.
- Successfully conducted the November 2008 Presidential General Election, increasing voter turnout by 5.89% to 86.36% from 80.47% in the 2004 Presidential General Election.
- Successfully conducted a State special election in May, measured by conducting the election in a manner that eliminated or reduced potential for errors, and timely completing the election canvass and certification of the election results by the 28th day after the election.
- Conducted two local elections as requested by local agencies:
 - County Retirement Board Election
 - Santa Rita Hills CSD Formation Election
- Utilized the mail ballot opener and extractor purchased in 2008 in 3 major elections. This replaced the manual process of opening, extracting, and flattening 80,000 vote by mail ballots; increased the speed of processing vote by mail ballots from 25 days to 2 days; and reduced the number of staff hours to flatten and inspect the ballots from 400 to 216 hours, allowing for efficiencies gained in staff resources to be re-directed to other areas.
- Implemented the use of an intelligent character recognition software program to electronically scan and identify if a voter voted at the polls in order to avoid double voting by

provisional or emergency ballot. This software replaced the manual task of going through each roster and hand keying whether a voter had voted at the polls. Automation of this process reduced errors created by the manual process and reduced the number of staff dedicated to this task by 4 to 6 staff members, allowing those staff resources to be re-directed to other areas.

- Completed the conversion of data in the CampaignDoc Software Program that captures Financial Reporting Statements mandated by the Fair Political Practice Commission. This software program manages roughly 2,000 annual filings and centralizes the scanned images creating a linked record. This system provides greater processing efficiencies and accessibility of this information.
- As required by law, completed various voter outreach mailings to notice and purge voter registrations for inactive voters (voters that had not voted or had any changes to their voter record in the past four years) and voters who submitted a change of address notice. The various mailings resulted in updates or deletions to roughly 34,000 voter records.

Proposed Strategic Actions:

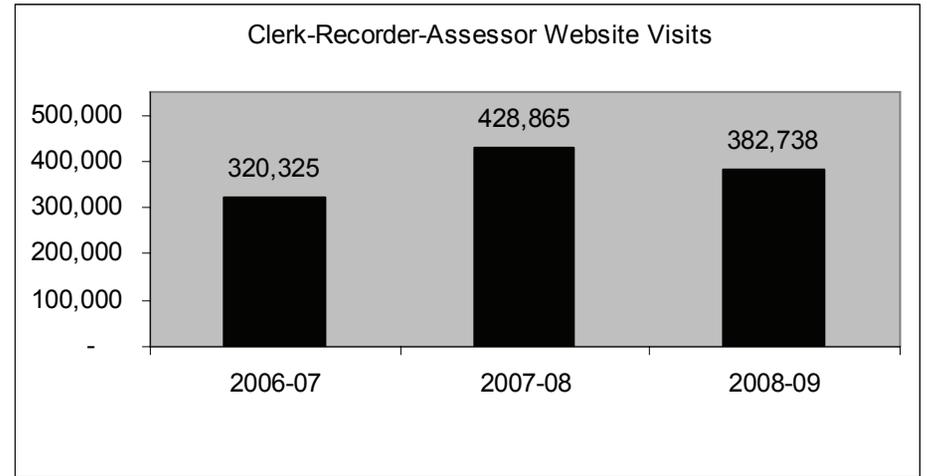
- In collaboration with General Services, identify viable options for a centralized election facility to co-locate all election operations currently operating out of several different locations. Centralizing the operations will provide improved operational effectiveness and efficiencies in the management of staff and execution of operations.
 - Find a cost effective interim solution.
 - Identify ways to utilize existing space more efficiently.
- Successfully conduct the June 2010 gubernatorial Primary Election, measured by conducting the election in a manner that eliminates or reduces potential for errors, timely completing the election canvass and certification of the election results by the 28th day after the election, and maintaining or increasing the voter turnout rate in the last comparable election.
- Work towards making the Financial Reporting Statements mandated by the Fair Political Practice Commission available for public access from our lobby computers. This will increase customer accessibility of information and reduce staff research time for these types of customer requests.
- Identify and research options for a new HAVA compliant vote tabulation system to replace the aging and outdated fleet of systems that have exceeded their useful life. Goal is to identify and procure a system for the 2010 election.
- Research and identify methods or systems for sorting vote by mail ballots to replace the current system of manual sorting. Sorting vote by mail ballots is required for conducting manual tallies during the canvass and also required for district or precinct recounts. Automation of this process will make this labor intensive process more efficient creating savings in staff resources.
- Improve data availability in the Election Division website, providing customers greater access of information, thereby reducing staff resources in researching such information.

CLERK-RECORDER-ASSESSOR

Department Summary (cont'd)

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Department-wide Effectiveness Measures				
Maintain an accurate and accessible database of vitals (births, deaths, marriages) and official records.	Yes	Yes	Yes	Yes
Complete and deliver an accurate assessment roll to the Auditor-Controller's Office by June 30, in accordance with Revenue and Taxation Code section 616.	Yes	Yes	Yes	Yes
Conduct all elections and associated functions (i.e. processing petitions and maintaining the voter registration database) as required by law, thus maintaining the public trust in the election process.	Yes	Yes	Yes	Yes

The department strives to increase or maintain customer accessibility of information by maintaining a department website with updated and concise information and improving statistical information available on-line.



Note: As of January 2009, new statistical software was deployed potentially impacting a consistent level of reporting.

CLERK-RECORDER-ASSESSOR

Administration

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Use of Funds Summary				
<i>Operating Expenditures</i>				
Administration	\$ 839,647	\$ 863,417	\$ 860,614	\$ 900,971
Expenditure Total	839,647	863,417	860,614	900,971
<i>Other Financing Uses</i>				
Operating Transfers	1,635	1,716	1,716	1,715
Division Total	\$ 841,282	\$ 865,133	\$ 862,330	\$ 902,686

Character of Expenditures

<i>Operating Expenditures</i>				
Regular Salaries	600,844	572,604	603,606	601,187
Overtime	--	144	144	--
Extra Help	1,528	--	--	--
Benefits	176,582	210,745	197,007	223,167
Salaries & Benefits Sub-Total	778,954	783,493	800,757	824,354
Services & Supplies	60,693	79,924	59,857	76,617
Expenditure Total	\$ 839,647	\$ 863,417	\$ 860,614	\$ 900,971

Source of Funds Summary

<i>Departmental Revenues</i>				
Revenue Total	\$ --	\$ --	\$ --	\$ --
<i>General Fund Contribution</i>				
	839,684	865,133	862,330	902,686
<i>Other Financing Sources</i>				
Operating Transfers	1,598	--	--	--
Division Total	\$ 841,282	\$ 865,133	\$ 862,330	\$ 902,686

SERVICE DESCRIPTION

The Administration Division is primarily responsible for budgeting, accounting, personnel and departmental management. This division coordinates the development, submittal and administration of the departmental budget, assists division managers regarding classification, recruitment, selection and appointment of new employees, and develops and maintains the department's training and orientation program for current and new employees.

	Actual FY 07-08		Adopted FY 08-09		Est. Actual FY 08-09		Recommended FY 09-10	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
Position Summary								
<i>Permanent</i>								
Administration	5.0	5.0	5.0	4.9	5.0	5.0	5.0	5.0
Total Permanent	5.0	5.0	5.0	4.9	5.0	5.0	5.0	5.0
<i>Non-Permanent</i>								
Extra Help	--	0.1	--	--	--	--	--	--
Total Positions	5.0	5.0	5.0	4.9	5.0	5.0	5.0	5.0

Significant Changes (FY 2008-09 Adopted to FY 2008-09 Estimated Actual)

The Fiscal Year 2008-09 Estimated Actual operating expenditures decreased by \$2,000, to \$861,000, from the Fiscal Year 2008-09 Adopted Budget of \$863,000. This 0% increase is the result of:

- -\$20,000 – Net savings in miscellaneous services and supplies;
- +\$18,000 – Unrealized salary savings.

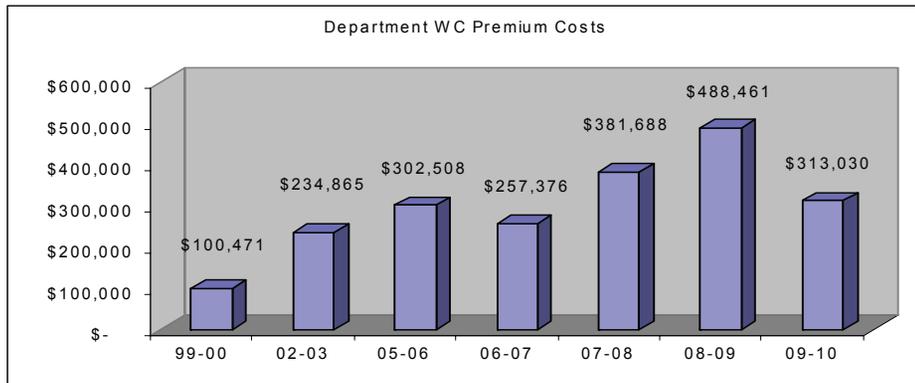
Significant Changes (FY 2008-09 Estimated Actual to FY 2009-10 Recommended)

The Fiscal Year 2009-10 Recommended operating expenditures will increase by \$40,000 to \$901,000, from the Fiscal Year 2008-09 Estimated Actual of \$861,000. This 5% increase is the result of:

- +\$24,000 – Net increase in salaries and benefit costs for 5.0 FTE's, offset by one-time furlough and health insurance cost savings in Fiscal Year 2008-09;
- +\$16,000 - Miscellaneous item purchases and services deferred from the previous year.

**CLERK-RECORDER-ASSESSOR
Administration (cont'd)**

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Recurring Performance Measures				
To ensure an efficient and responsive government, the Clerk-Recorder-Assessor will reduce or maintain the number of General Liability claims filed from previous year's actual claims filed.	100%	0%	0%	0%
	2	--	--	--
	2	1	2	--
As an efficient and responsive government, the Clerk-Recorder-Assessor will reduce or maintain the number of Workers' Compensation claims filed from the previous year's actual claims filed.	12%	0%	0%	0%
	1	--	--	--
	8	--	1	--
As an efficient and responsive government, the Clerk-Recorder-Assessor will maintain a productive workforce through a countywide Lost Time Rate of 5.9% or less when measuring lost hours to total budgeted hours.	4.6%	5.9%	5.3%	5.3%
	10,732	13,818	11,978	12,170
	233,047	234,208	226,000	229,632
As an efficient and responsive government, the County will maintain a quality workforce through completing 100% of departmental Employee Performance Reviews (EPRs) by the Anniversary Due Date.	83%	100%	93%	100%
	94	112	100	110
	112	112	107	110



	Actual FY 07-08 Pos.	Adopted FY 08-09 Pos.	Est. Actual FY 08-09 Pos.	Recommended FY 09-10 Pos.
Position Detail				
Administration				
Asst Director	--	1.0	1.0	1.0
County Clk-Rec-Assessor	--	1.0	1.0	1.0
Clerk-Recorder-Assessor	1.0	--	--	--
HR Manager	--	1.0	1.0	1.0
Assistant Clerk-Recorder-Assessor	1.0	--	--	--
Fiscal Manager	--	1.0	1.0	1.0
Fiscal Manager	1.0	--	--	--
Human Resources Manager Dept	1.0	--	--	--
Financial Office Pro	--	--	--	1.0
Account Technician SR	1.0	1.0	1.0	--
Sub-Division Total	5.0	5.0	5.0	5.0
Division Total	5.0	5.0	5.0	5.0

CLERK-RECORDER-ASSESSOR

Elections

Use of Funds Summary

Operating Expenditures

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Elections Administration	\$ 2,291,995	\$ 1,544,369	\$ 1,608,919	\$ 1,205,523
Scheduled Elections	2,768,378	2,081,499	2,148,916	1,684,855
Special Elections	31,303	--	1,247,422	--
Operating Total	5,091,676	3,625,868	5,005,257	2,890,378

Non-Operating Expenditures

Capital Assets	91,014	2,203,556	--	1,329,432
Expenditure Total	5,182,690	5,829,424	5,005,257	4,219,810

Other Financing Uses

Operating Transfers	101,195	104,457	103,059	104,628
Designated for Future Uses	244,778	3,826,712	431,792	1,426,078
Division Total	\$ 5,528,663	\$ 9,760,593	\$ 5,540,108	\$ 5,750,516

Character of Expenditures

Operating Expenditures

Regular Salaries	1,023,197	817,377	917,154	674,050
Overtime	150,494	80,001	149,842	42,000
Extra Help	153,335	99,999	125,885	52,000
Benefits	385,371	332,293	376,500	275,449
Salaries & Benefits Sub-Total	1,712,397	1,329,670	1,569,381	1,043,499
Services & Supplies	3,379,279	2,296,198	3,435,876	1,846,879
Operating Total	5,091,676	3,625,868	5,005,257	2,890,378

Non-Operating Expenditures

Capital Assets	91,014	2,203,556	--	1,329,432
Expenditure Total	\$ 5,182,690	\$ 5,829,424	\$ 5,005,257	\$ 4,219,810

Source of Funds Summary

Departmental Revenues

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Elections, Federal & State Revenues	\$ 378,458	\$ 4,443,634	\$ 2,186,158	\$ 3,109,000
Other Charges for Services	254,303	350,000	783,398	155,000
Miscellaneous Revenue	3,045	--	2	--
Revenue Total	635,806	4,793,634	2,969,558	3,264,000

General Fund Contribution

	3,247,531	2,730,903	2,570,550	2,441,084
--	-----------	-----------	-----------	-----------

Other Financing Sources

Operating Transfers	7,373	--	--	--
Sale of Property	181,700	--	--	--
Use of Prior Fund Balances	1,456,253	2,236,056	--	45,432
Division Total	\$ 5,528,663	\$ 9,760,593	\$ 5,540,108	\$ 5,750,516

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
	Pos.	FTE	Pos.	FTE

Position Summary

Permanent

Elections Administration	18.0	10.0	18.0	8.8	18.0	6.1	9.0	4.7
Scheduled Elections	--	6.8	--	2.9	--	10.5	9.0	4.3
Special Elections	--	0.2	--	--	--	0.0	--	--
Total Permanent	18.0	16.9	18.0	11.8	18.0	16.7	18.0	9.0

Non-Permanent

Extra Help	--	4.7	--	--	--	4.9	--	--
Total Positions	18.0	21.6	18.0	11.8	18.0	21.6	18.0	9.0

Significant Changes (FY 2008-09 Adopted to FY 2008-09 Estimated Actual)

The Fiscal Year 2008-09 Estimated Actual operating expenditures increased by \$1,379,000, to \$5,005,000, from the Fiscal Year 2008-09 Adopted Budget of \$3,626,000. This 38% increase is the result of:

- +\$1,088,000 – Increased costs for the unanticipated State Special Election in May 2009;
- +\$159,000 – Net salary cost increase from additional staff resources needed to absorb workload impacted by high voter participation and interest in this presidential election year, offset by furlough and health insurance cost savings;
- +\$132,000 – Net cost increases in Elections due to a more resource intensive election year driven by increased voter interest and participation for the November 2008 Presidential Election.

SERVICE DESCRIPTION

The Election Division is responsible for conducting elections, designing precinct and district boundaries, identifying polling place, recruiting election officers, conducting voter registration activities and maintaining voter registration records, and verifying petitions. The Division also manages candidate and campaign filings and conducts State and Federal voter outreach programs.

Significant Changes (FY 2008-09 Estimated Actual to FY 2009-10 Recommended)

The Fiscal Year 2009-10 Recommended operating expenditures will decrease by \$2,115,000, to \$2,890,000, from the Fiscal Year 2008-09 Estimated Actual of \$5,005,000. This 42% decrease is the result of:

- -\$1,088,000- Decrease in costs for the State special election costs in FY 2008-09;
- -\$523,000 – Decrease in net costs from election year cost differences between the Gubernatorial Election year in Fiscal Year 2009-10 and the Presidential Election year in Fiscal Year 2008-09;
- -\$344,000 – Increase in salary and benefit costs for 8.9 FTE's, offset by one-time furlough and health insurance cost savings in Fiscal Year 2008-09 and a reduction of 2.8 FTE's due to budget constraints;
- -\$115,000 – Cost savings from termination of leased office space for the absentee processing center;
- -\$45,000 – Cost savings from reduction in one-time computer equipment purchases in Fiscal Year 2008-09.

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
	Pos.	Pos.	Pos.	Pos.

Position Detail

Elections Administration

Division Manager	--	2.0	2.0	2.0
Division Manager	1.0	--	--	--
Management Specialist	1.0	--	--	--
Admin Office Pro	--	--	--	7.0
Computer Systems Specialist	1.0	1.0	1.0	--
Mapping/GIS Analyst	1.0	--	--	--
Care Specialist	13.0	11.0	11.0	--
Departmental Assistant	--	4.0	4.0	--
Storekeeper	1.0	--	--	--
Sub-Division Total	18.0	18.0	18.0	9.0

Scheduled Elections

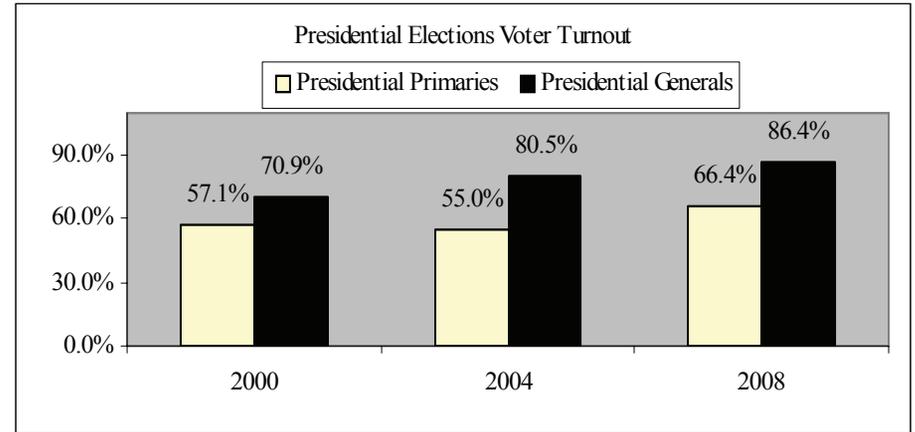
Admin Office Pro	--	--	--	8.0
Computer Systems Specialist	--	--	--	1.0
Sub-Division Total	--	--	--	9.0

CLERK-RECORDER-ASSESSOR

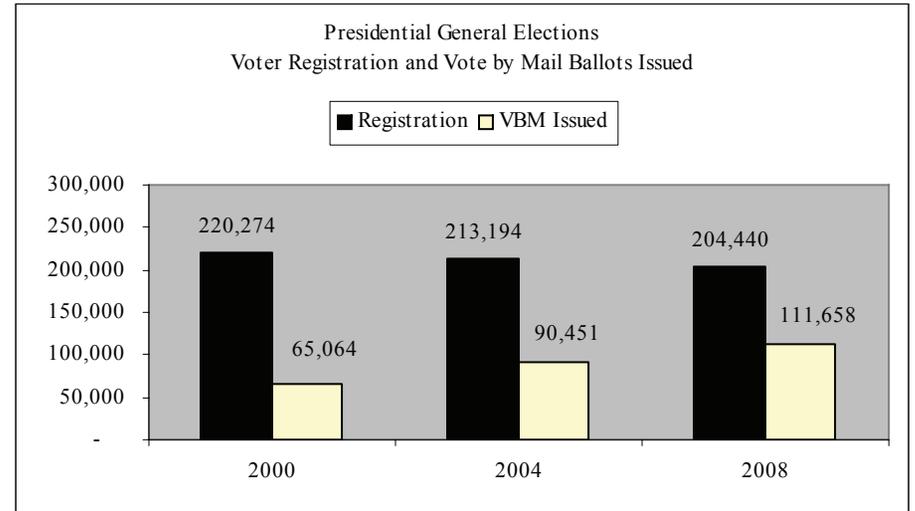
Elections (cont'd)

Recurring Performance Measures

Ensure maximization of voter participation by increasing or maintaining voter turnout for comparable elections.



Through voter outreach efforts, increase or maintain the number of absentee voters in comparable elections leading to increased voter participation.



CLERK-RECORDER-ASSESSOR

County Clerk-Recorder

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Use of Funds Summary				
<i>Operating Expenditures</i>				
County Clerk-Recorder	\$ 2,374,976	\$ 2,816,520	\$ 2,798,037	\$ 2,738,169
Operating Total	2,374,976	2,816,520	2,798,037	2,738,169
<i>Non-Operating Expenditures</i>				
Capital Assets	17,868	--	--	--
Expenditure Total	2,392,844	2,816,520	2,798,037	2,738,169
<i>Other Financing Uses</i>				
Operating Transfers	581,374	827,631	689,180	1,137,116
Designated for Future Uses	691,181	724,000	720,000	725,000
Division Total	\$ 3,665,399	\$ 4,368,151	\$ 4,207,217	\$ 4,600,285

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Character of Expenditures				
<i>Operating Expenditures</i>				
Regular Salaries	1,216,042	1,229,528	1,189,564	1,300,603
Overtime	3,658	--	5,000	--
Extra Help	22,138	--	--	--
Benefits	592,583	918,914	876,684	796,679
Salaries & Benefits Sub-Total	1,834,421	2,148,442	2,071,248	2,097,282
Services & Supplies	540,555	668,078	726,789	640,887
Operating Total	2,374,976	2,816,520	2,798,037	2,738,169
<i>Non-Operating Expenditures</i>				
Capital Assets	17,868	--	--	--
Expenditure Total	\$ 2,392,844	\$ 2,816,520	\$ 2,798,037	\$ 2,738,169

Source of Funds Summary

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
<i>Departmental Revenues</i>				
Interest	\$ 33,009	\$ 20,000	\$ 20,000	\$ 5,000
Recording Fees	1,189,516	1,020,000	1,020,000	1,091,000
Other Charges for Services	831,509	786,300	614,500	727,300
Miscellaneous Revenue	140,087	142,000	142,526	140,000
Revenue Total	2,194,121	1,968,300	1,797,026	1,963,300
<i>General Fund Contribution</i>				
	310,226	822,053	1,012,180	788,795
<i>Other Financing Sources</i>				
Operating Transfers	8,300	--	--	--
Use of Prior Fund Balances	1,152,752	1,577,798	1,398,011	1,848,190
Division Total	\$ 3,665,399	\$ 4,368,151	\$ 4,207,217	\$ 4,600,285

	Actual FY 07-08		Adopted FY 08-09		Est. Actual FY 08-09		Recommended FY 09-10	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
Position Summary								
<i>Permanent</i>								
County Clerk-Recorder	25.0	21.3	26.0	22.0	26.0	19.8	26.0	21.0
Total Permanent	25.0	21.3	26.0	22.0	26.0	19.8	26.0	21.0
<i>Non-Permanent</i>								
Extra Help	--	0.5	--	--	--	--	--	--
Total Positions	25.0	21.8	26.0	22.0	26.0	19.8	26.0	21.0

SERVICE DESCRIPTION

The Clerk-Recorder Division is responsible for recording and archiving official records, real property maps, and vital records. The Clerk responsibilities include accepting filings for fictitious business names, notary bond filings, issuing vital records, and the processing of passport applications.

Significant Changes (FY 2008-09 Adopted to FY 2008-09 Estimated Actual)

The Fiscal Year 2008-09 Estimated Actual operating expenditures decreased \$19,000 to \$2,798,000, from the Fiscal Year 2008-09 Adopted Budget of \$2,817,000. This 1% decrease is the result of:

- -\$77,000 – Decrease in net salary costs from division furlough and health insurance salary cost savings;
- -\$38,000 - Decrease in Recorder Division office supplies, postage, and copier costs;
- -\$11,000 – Net miscellaneous cost savings.

Significant Changes (FY 2008-09 Estimated Actual to FY 2009-10 Recommended)

The Fiscal Year 2009-10 Recommended operating expenditures will decrease by \$60,000 to \$2,738,000, from the Fiscal Year 2007-08 Estimated Actual of \$2,798,000. This 2% decrease is the result of:

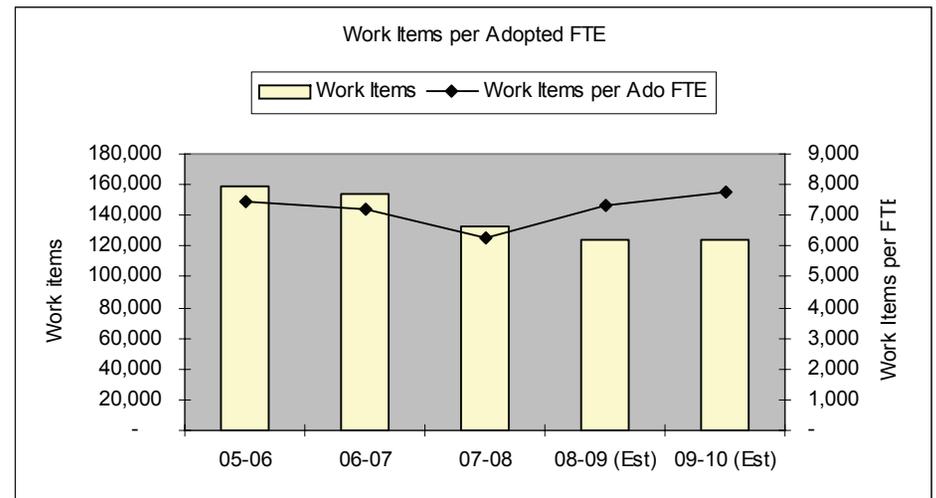
- -\$86,000 – Decrease in costs from one-time Recorder project expenditures incurred in Fiscal Year 2008-09;
- +\$26,000 – Increase in salary and benefit costs for 21 FTE’s in Fiscal Year 2009-10, offset by one-time furlough and health insurance cost savings in Fiscal Year 2008-09 and reduction of a .99 FTE due to budget constraints.

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Recurring Performance Measures				
County Clerk-Recorder				
Ensure timely recordation of title company official records by recording the documents received the same business day.	99% 25,942 25,969	98% 36,500 37,000	100% 32,000 32,000	100% 32,000 32,000
Ensure timely recordation of Reconveyances by recording Reconveyances received within 2 business days of receipt.	87% 13,992 15,923	87% 14,000 16,000	99% 10,200 10,300	80% 9,600 12,000
Ensure timely processing of official records by recording and mailing documents received within 7 business days of receipt of document.	97% 63,231 64,638	75% 64,000 85,000	89% 67,000 75,000	85% 60,000 70,000

CLERK-RECORDER-ASSESSOR

County Clerk-Recorder (cont'd)

	Actual FY 07-08 Pos.	Adopted FY 08-09 Pos.	Est. Actual FY 08-09 Pos.	Recommended FY 09-10 Pos.
Position Detail				
County Clerk-Recorder				
Division Manager	--	1.0	1.0	1.0
Project Manager	--	1.0	1.0	1.0
Systems & Programming Analyst	--	1.0	1.0	1.0
Division Manager	1.0	--	--	--
Management Specialist	1.0	1.0	1.0	1.0
Admin Office Pro	--	--	--	21.0
Financial Office Pro	--	--	--	1.0
Care Specialist	22.0	21.0	21.0	--
Account Technician	1.0	1.0	1.0	--
Sub-Division Total	25.0	26.0	26.0	26.0
Division Total	25.0	26.0	26.0	26.0



CLERK-RECORDER-ASSESSOR

Information Systems

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Use of Funds Summary				
<i>Operating Expenditures</i>				
IS Development & Maintenance	\$ 881,120	\$ 993,913	\$ 1,029,751	\$ 1,209,665
LAN Administration	262,649	288,921	293,596	377,816
Special Projects	232,126	260,970	500	--
Operating Total	1,375,895	1,543,804	1,323,847	1,587,481
<i>Non-Operating Expenditures</i>				
Capital Assets	37,596	55,000	--	40,000
Expenditure Total	1,413,491	1,598,804	1,323,847	1,627,481
<i>Other Financing Uses</i>				
Operating Transfers	3,442	--	--	--
Division Total	<u>\$ 1,416,933</u>	<u>\$ 1,598,804</u>	<u>\$ 1,323,847</u>	<u>\$ 1,627,481</u>

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Character of Expenditures				
<i>Operating Expenditures</i>				
Regular Salaries	791,081	900,762	777,636	918,253
Overtime	6,784	--	6,000	--
Extra Help	--	--	103	--
Benefits	263,161	341,057	284,919	354,145
Salaries & Benefits Sub-Total	1,061,026	1,241,819	1,068,658	1,272,398
Services & Supplies	314,869	301,985	255,189	315,083
Operating Total	1,375,895	1,543,804	1,323,847	1,587,481
<i>Non-Operating Expenditures</i>				
Capital Assets	37,596	55,000	--	40,000
Expenditure Total	<u>\$ 1,413,491</u>	<u>\$ 1,598,804</u>	<u>\$ 1,323,847</u>	<u>\$ 1,627,481</u>

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Source of Funds Summary				
<i>Departmental Revenues</i>				
Revenue Total	\$ --	\$ --	\$ --	\$ --
<i>General Fund Contribution</i>				
	1,315,528	1,401,260	1,132,015	1,484,481
<i>Other Financing Sources</i>				
Operating Transfers	2,958	--	--	--
Use of Prior Fund Balances	98,447	197,544	191,832	143,000
Division Total	<u>\$ 1,416,933</u>	<u>\$ 1,598,804</u>	<u>\$ 1,323,847</u>	<u>\$ 1,627,481</u>

	Actual FY 07-08		Adopted FY 08-09		Est. Actual FY 08-09		Recommended FY 09-10	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
Position Summary								
<i>Permanent</i>								
IS Development & Maintenance	6.0	5.9	7.0	6.7	7.0	5.8	8.0	7.0
LAN Administration	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.7
Special Projects	3.0	1.0	1.0	1.0	1.0	--	--	--
Total Permanent	11.0	8.9	10.0	9.7	10.0	7.8	10.0	9.7
<i>Non-Permanent</i>								
Extra Help	--	--	--	--	--	0.0	--	--
Total Positions	<u>11.0</u>	<u>8.9</u>	<u>10.0</u>	<u>9.7</u>	<u>10.0</u>	<u>7.8</u>	<u>10.0</u>	<u>9.7</u>

SERVICE DESCRIPTION

The Information Systems Division is responsible for providing support and visionary technical direction to all functions of the Clerk-Recorder-Assessor Department in support of its own mission and goals.

Significant Changes (FY 2008-09 Adopted to FY 2008-09 Estimated Actual)

The Fiscal Year 2008-09 Estimated Actual operating expenditures decreased by \$220,000 to \$1,324,000, from the Fiscal Year 2008-09 Adopted Budget of \$1,544,000. This 14% decrease is the result of:

- -\$173,000 – Decrease in net salary costs from division furlough and health insurance cost savings and an IT position vacancy due to recruitment difficulties;
- -\$24,000 – Decrease in training and travel expenses due to increased workload, reducing time available for training;
- -\$10,000 - Reduced level of consulting services for IT projects;
- -\$9,000 – Deferral of computer equipment upgrades and replacements;
- -\$4,000 – Net miscellaneous cost savings.

Significant Changes (FY 2008-09 Estimated Actual to FY 2009-10 Recommended)

The Fiscal Year 2009-10 Recommended operating expenditures will increase by \$263,000, to \$1,587,000 from the Fiscal Year 2008-09 Estimated Actual of \$1,324,000. This 20% increase is the result of:

- +\$203,000 – Increase in salary and benefit costs for 9.7 FTE's, offset by one-time furlough and health insurance cost savings and temporary position vacancy savings attained in Fiscal Year 2008-09;
- +\$60,000 – Increase in the department's share of computer mainframe operating costs due to other department's migration off the system, placing the full burden of operating costs on the three tax departments.

**CLERK-RECORDER-ASSESSOR
Information Systems (cont'd)**

	Actual FY 07-08 <u>Pos.</u>	Adopted FY 08-09 <u>Pos.</u>	Est. Actual FY 08-09 <u>Pos.</u>	Recommended FY 09-10 <u>Pos.</u>
Position Detail				
IS Development & Maintenance				
Project Manager	--	1.0	1.0	1.0
PM - Tax System Integration	1.0	--	--	--
Systems & Programming Analyst	<u>5.0</u>	<u>6.0</u>	<u>6.0</u>	<u>7.0</u>
Sub-Division Total	6.0	7.0	7.0	8.0
LAN Administration				
EDP Office Auto Specialist	--	--	--	1.0
Computer Systems Specialist	<u>2.0</u>	<u>2.0</u>	<u>2.0</u>	<u>1.0</u>
Sub-Division Total	2.0	2.0	2.0	2.0
Special Projects				
PM - Tax System Integration	1.0	--	--	--
Systems & Programming Analyst	<u>2.0</u>	<u>1.0</u>	<u>1.0</u>	<u>--</u>
Sub-Division Total	3.0	1.0	1.0	--
Division Total	<u>11.0</u>	<u>10.0</u>	<u>10.0</u>	<u>10.0</u>

CLERK-RECORDER-ASSESSOR

Assessor

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
Use of Funds Summary				
<i>Operating Expenditures</i>				
Operations	\$ 1,622,332	\$ 2,009,016	\$ 1,828,680	\$ 2,139,013
Real Property	1,907,189	2,013,671	1,905,081	2,111,506
Business/Minerals	2,457,151	2,767,960	2,534,937	2,849,906
Expenditure Total	5,986,672	6,790,647	6,268,698	7,100,425
<i>Other Financing Uses</i>				
Operating Transfers	4,792	5,028	5,028	5,028
Division Total	\$ 5,991,464	\$ 6,795,675	\$ 6,273,726	\$ 7,105,453

Character of Expenditures

<i>Operating Expenditures</i>				
Regular Salaries	3,868,377	4,343,582	4,072,373	4,648,492
Overtime	28,966	11,610	9,000	--
Extra Help	28,722	40,298	4,000	--
Benefits	1,340,724	1,750,865	1,572,872	1,883,929
Salaries & Benefits Sub-Total	5,266,789	6,146,355	5,658,245	6,532,421
Services & Supplies	719,883	644,292	610,453	568,004
Expenditure Total	\$ 5,986,672	\$ 6,790,647	\$ 6,268,698	\$ 7,100,425

Source of Funds Summary

<i>Departmental Revenues</i>				
Property Tax Admin Fee	\$ 1,455,673	\$ 1,700,000	\$ 1,925,000	\$ 1,900,000
Supplemental Admin Fees	1,036,022	1,000,000	700,000	700,000
Miscellaneous Revenue	27,574	25,000	19,003	19,000
Revenue Total	2,519,269	2,725,000	2,644,003	2,619,000
<i>General Fund Contribution</i>	3,414,318	3,622,248	3,471,296	3,601,453
<i>Other Financing Sources</i>				
Operating Transfers	14,356	--	--	--
Use of Prior Fund Balances	43,521	448,427	158,427	885,000
Division Total	\$ 5,991,464	\$ 6,795,675	\$ 6,273,726	\$ 7,105,453

Actual FY 07-08		Adopted FY 08-09		Est. Actual FY 08-09		Recommended FY 09-10		
Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE	
Position Summary								
<i>Permanent</i>								
Operations	23.0	17.5	22.0	21.1	22.0	17.8	22.0	21.7
Real Property	17.0	18.2	18.0	17.3	18.0	16.1	18.0	17.7
Business/Minerals	27.0	25.6	27.0	25.9	27.0	25.0	27.0	26.4
Total Permanent	67.0	61.3	67.0	64.3	67.0	58.8	67.0	65.7
<i>Non-Permanent</i>								
Contract	--	0.9	--	--	--	0.9	--	--
Extra Help	--	1.0	--	--	--	0.1	--	--
Total Positions	67.0	63.1	67.0	64.3	67.0	59.8	67.0	65.7

Significant Changes (FY 2008-09 Adopted to FY 2008-09 Estimated Actual)

The Fiscal Year 2008-09 Estimated Actual operating expenditures decreased by \$522,000 to \$6,269,000, from the Fiscal Year 2008-09 Adopted Budget of \$6,791,000. This 8% decrease is the result of:

- -\$488,000 – Decrease in net salary costs from furlough and health insurance cost savings and from Assessor positions held vacant due to budget constraints;
- -\$15,000 – Decrease from deferment of computer equipment and office furniture upgrades and replacements;
- -\$13,000 – Net decrease in miscellaneous services and supplies;
- -\$6,000 - Decrease in training and travel expenses due to increased workload, which reduced time available for training.

Significant Changes (FY 2008-09 Estimated Actual to FY 2009-10 Recommended)

The Fiscal Year 2009-10 Recommended operating expenditures will increase by \$831,000, to \$7,100,000, from the Fiscal Year 2008-09 Estimated Actual of \$6,269,000. This 13% increase is the result of:

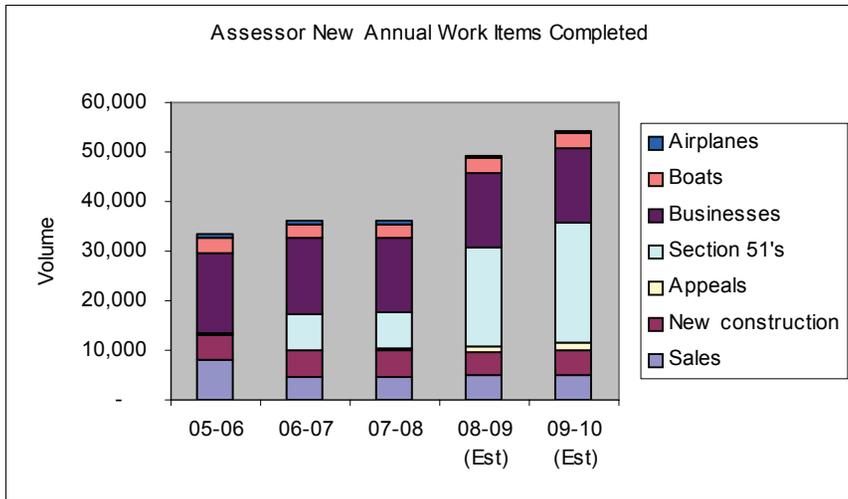
- +\$923,000 – Increase in salary and benefit costs for 65.7 FTE's which includes an increase of 1.6 FTE's to accommodate the increase in workload, offset by one-time furlough and health insurance cost savings and temporary position vacancy savings in Fiscal Year 2008-09;
- -\$49,000 – Decrease in extra help, overtime, and contractor services;
- -\$43,000 – Decrease in Assessor project consulting services.

SERVICE DESCRIPTION

The Assessor Division's responsibility, utilizing information systems technology, is to identify, assess, value, and maintain assessments of all real, business, and mineral properties taxable under the authority of the State of California and to create, maintain, and disseminate cadastral (land ownership) maps that accurately describe all Assessment Roll parcels. The division defends property valuations under appeal before the Assessment Appeals Board.

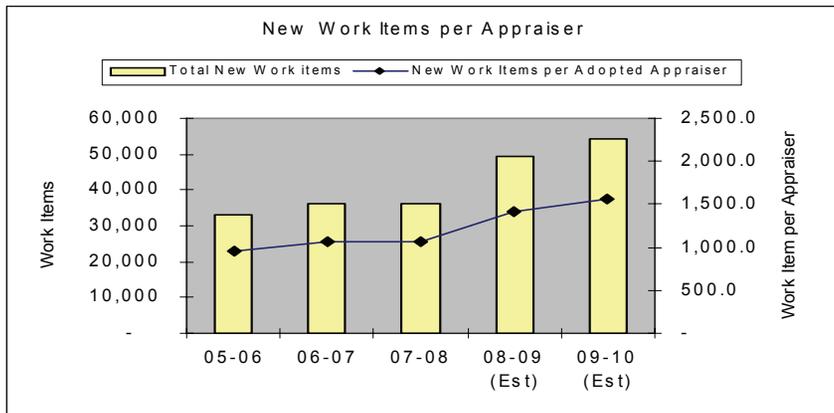
Recurring Performance Measures

Process 100% of total new work items by June 30.



Note 1) Does not include comprehensive list of work items (ie, factored base year values rollovers)

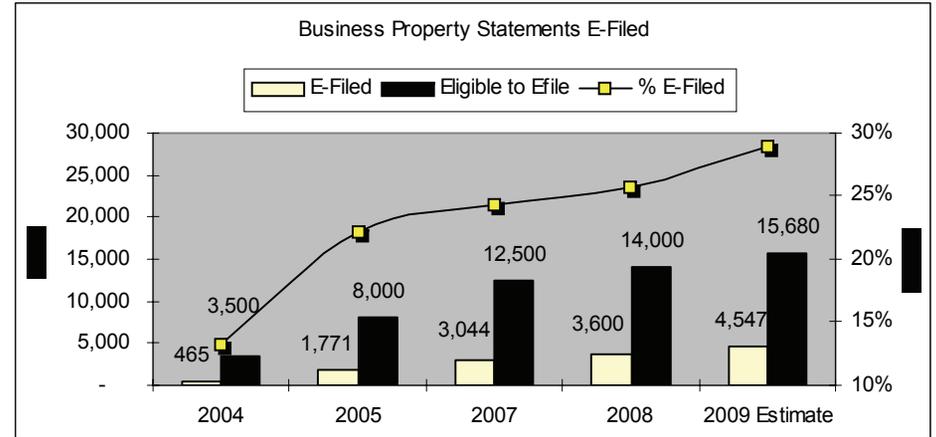
Increase or maintain the number of new work items per Appraiser.



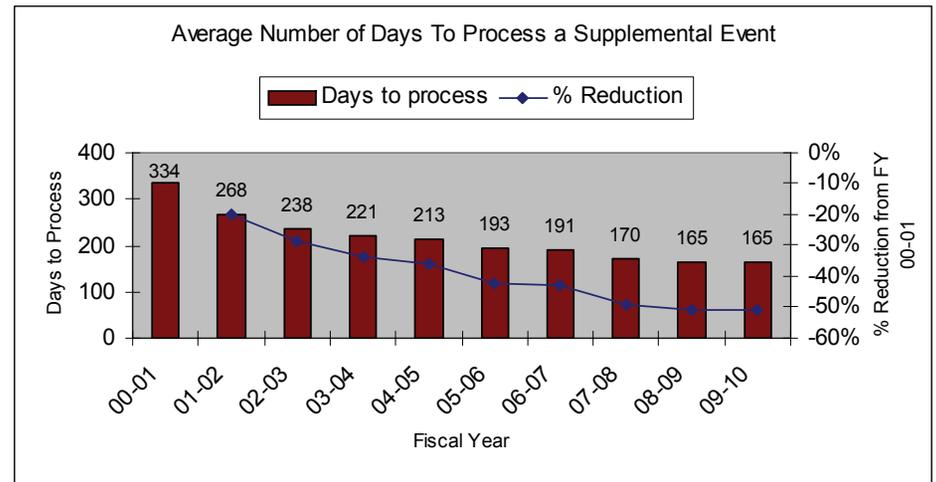
CLERK-RECORDER-ASSESSOR

Assessor (cont'd)

Increase processing efficiency by increasing the number of Business Property Statements electronically filed.



Decrease or maintain the number of days to process a supplemental event increasing customer responsiveness.



CLERK-RECORDER-ASSESSOR

Assessor (cont'd)

	Actual FY 07-08	Adopted FY 08-09	Est. Actual FY 08-09	Recommended FY 09-10
	Pos.	Pos.	Pos.	Pos.
Position Detail				
Operations				
Division Manager	--	1.0	1.0	1.0
Division Manager	1.0	--	--	--
Mapping/GIS Analyst Supervisor	1.0	1.0	1.0	1.0
Admin Office Pro	--	--	--	16.0
Mapping/GIS Analyst	1.0	2.0	2.0	2.0
Care Specialist	17.0	16.0	16.0	--
Mapping/GIS Tech	3.0	2.0	2.0	2.0
Sub-Division Total	23.0	22.0	22.0	22.0
Real Property				
Chief Appraiser	--	1.0	1.0	1.0
Division Manager	--	1.0	1.0	1.0
Chief Appraiser	1.0	--	--	--
Division Manager	1.0	--	--	--
Assessment Supervisor	3.0	3.0	3.0	3.0
Appraiser	10.0	11.0	11.0	11.0
Appraiser Aide	2.0	2.0	2.0	2.0
Sub-Division Total	17.0	18.0	18.0	18.0
Business/Minerals				
Division Manager	--	1.0	1.0	1.0
Division Manager	1.0	--	--	--
Assessment Supervisor	5.0	4.0	4.0	4.0
Admin Office Pro	--	--	--	4.0
Auditor-Appraiser	6.0	6.0	6.0	6.0
Appraiser	11.0	11.0	11.0	11.0
Care Specialist	3.0	4.0	4.0	--
Appraiser Aide	1.0	1.0	1.0	1.0
Sub-Division Total	27.0	27.0	27.0	27.0
Division Total	67.0	67.0	67.0	67.0

Property tax revenue generated by the Assessor is estimated at 87% of the County's discretionary revenue in Fiscal Year 2008-09, compared to 51% in Fiscal Year 1995-96.

