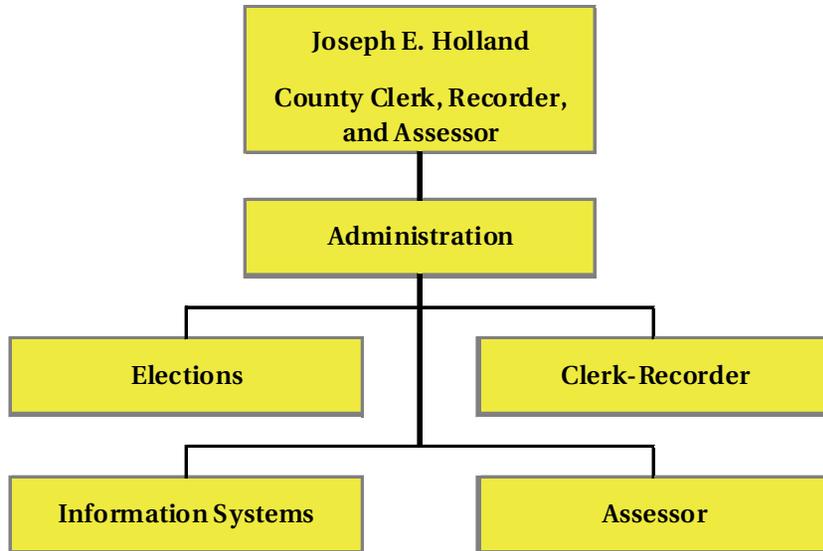
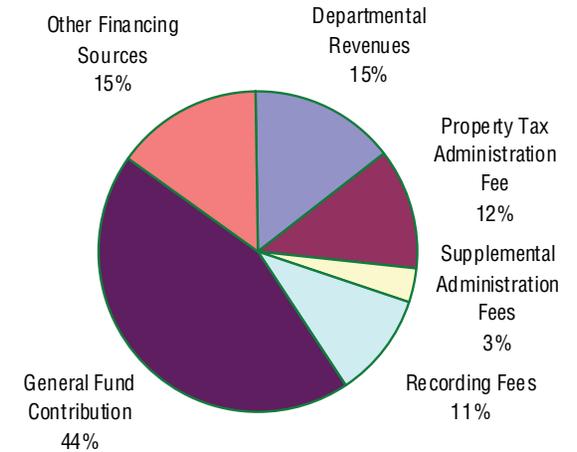


# CLERK-RECORDER-ASSESSOR

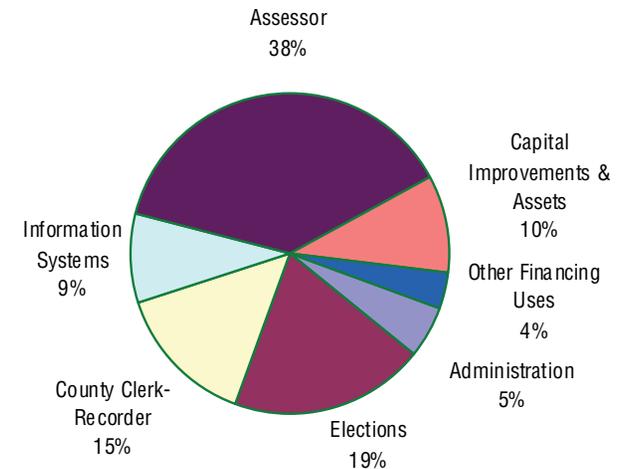
Budget & Positions (FTEs)	
Operating \$	15,913,276
Capital	1,760,364
Positions	97.4 FTEs



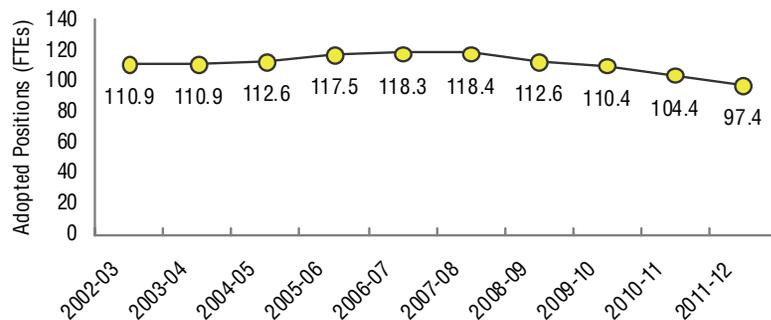
## SOURCE OF FUNDS



## USE OF FUNDS



## STAFFING TREND



**CLERK-RECORDER-ASSESSOR**

**Department Summary**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Use of Funds Summary</b>				
<i>Operating Expenditures</i>				
Administration	\$ 887,294	\$ 963,666	\$ 952,359	\$ 982,809
Elections	3,309,539	4,308,797	3,083,266	3,553,360
County Clerk-Recorder	2,549,388	2,475,072	2,439,887	2,708,278
Information Systems	1,598,209	1,665,558	1,619,106	1,631,216
Assessor	6,705,023	7,196,916	6,602,101	7,037,613
Operating Sub-Total	15,049,453	16,610,009	14,696,719	15,913,276
Less: Intra-County Revenues	(1,083)	--	--	--
Operating Total	15,048,370	16,610,009	14,696,719	15,913,276
<i>Non-Operating Expenditures</i>				
Capital Assets	287,100	2,305,145	718,645	1,760,364
Expenditure Total	15,335,470	18,915,154	15,415,364	17,673,640
<i>Other Financing Uses</i>				
Operating Transfers	1,421,487	690,753	690,751	408,670
Designated for Future Uses	859,157	2,277,613	2,552,811	274,338
Department Total	\$ 17,616,114	\$ 21,883,520	\$ 18,658,926	\$ 18,356,648

**Character of Expenditures**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<i>Operating Expenditures</i>				
Regular Salaries	\$ 7,766,972	\$ 8,023,134	\$ 7,688,476	\$ 7,868,191
Overtime	89,170	107,100	86,822	79,000
Extra Help	133,847	151,000	197,960	207,328
Benefits	3,641,020	3,693,571	3,562,077	4,008,339
Salaries & Benefits Sub-Total	11,631,009	11,974,805	11,535,335	12,162,858
Services & Supplies	3,418,444	4,635,204	3,161,384	3,750,418
Operating Sub-Total	15,049,453	16,610,009	14,696,719	15,913,276
Less: Intra-County Revenues	(1,083)	--	--	--
Operating Total	15,048,370	16,610,009	14,696,719	15,913,276
<i>Non-Operating Expenditures</i>				
Capital Assets	287,100	2,305,145	718,645	1,760,364
Expenditure Total	\$ 15,335,470	\$ 18,915,154	\$ 15,415,364	\$ 17,673,640

Note: Presentation of the individual program amounts for fiscal years 2009-10 and 2010-11 have been adjusted to provide a consistent level of detail with the fiscal year 2011-12 budget, however, the totals for 2009-10 and 2010-11 have not been changed.

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Source of Funds Summary</b>				
<i>Departmental Revenues</i>				
Interest	\$ 1,498	\$ --	\$ --	\$ --
Federal & State Revenues	755,013	3,744,867	2,273,987	1,826,697
Property Tax Administration Fee	2,086,042	2,190,000	2,816,000	2,180,000
Supplemental Administration Fee	524,442	500,000	500,000	600,000
Recording Fees	1,433,008	1,600,000	1,965,000	1,950,000
Other Charges for Services	881,457	992,000	1,154,839	671,259
Miscellaneous Revenue	201,986	184,000	220,521	225,000
Revenue Sub-Total	5,883,446	9,210,867	8,930,347	7,452,956
Less: Intra-County Revenues	(1,083)	--	--	--
Revenue Total	5,882,363	9,210,867	8,930,347	7,452,956
<i>General Fund Contribution</i>				
	9,075,030	8,662,999	8,662,999	8,148,562
<i>Other Financing Sources</i>				
Operating Transfers	50,047	--	--	70,000
Sale of Property	2,500	--	--	--
Use of Prior Fund Balances	2,606,174	4,009,654	1,065,580	2,685,130
Department Total	\$ 17,616,114	\$ 21,883,520	\$ 18,658,926	\$ 18,356,648

	Actual FY 09-10		Adopted FY 10-11		Est. Actual FY 10-11		Recommended FY 11-12	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
<b>Position Summary</b>								
<i>Permanent</i>								
Administration	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
Elections	18.0	10.6	18.0	10.5	18.0	13.7	18.0	10.4
County Clerk-Recorder	26.0	19.4	23.0	18.0	23.0	17.0	23.0	17.8
Information Systems	10.0	9.5	9.0	9.5	9.0	9.0	9.0	8.9
Assessor	67.0	58.5	71.0	61.4	71.0	56.5	71.0	55.2
Total Permanent	126.0	103.1	126.0	104.4	126.0	101.1	126.0	97.4
<i>Non-Permanent</i>								
Contract	--	0.7	--	--	--	1.0	--	--
Extra Help	--	4.5	--	--	--	11.1	--	--
Total Positions	126.0	108.3	126.0	104.4	126.0	113.1	126.0	97.4

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

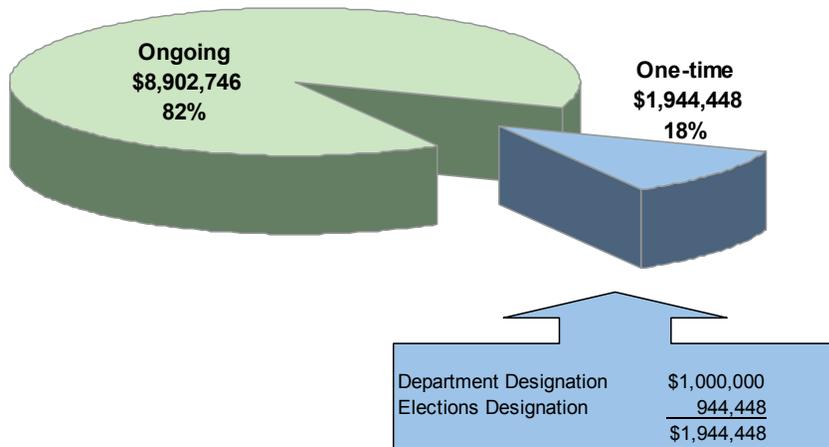
**MISSION STATEMENT**

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

**Budget Organization**

The divisions of the Clerk-Recorder-Assessor Department are Administration, Elections, Clerk-Recorder, Information Systems, and Assessor, with a staff equating to 97.4 full time equivalents, net of budgetary salary savings, providing services at three locations in south and north county.

**FY 2011-12 Funding Sources: Ongoing vs. One-time "Cliffs"**

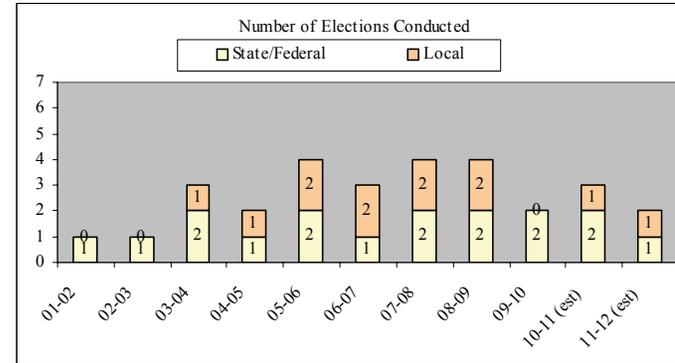


Eighteen percent of the Fiscal Year 2011-12 Recommended Budget is comprised of one-time sources of funding from various departmental designations. This \$1.9M structural imbalance is mainly the result of cost increases in excess of division revenues. These one-time sources are critical in funding the minimum level of services needed to preserve the County's property tax revenues and mandated election services. As a result of having to use these one time sources, the department will face a roughly \$1.9 million deficit in Fiscal Year 2012-13 which must be addressed to preserve these critical and mandated functions.

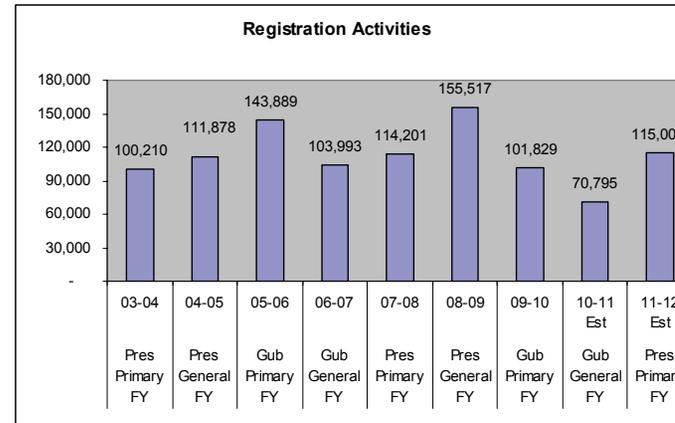
**CLERK-RECORDER-ASSESSOR**

**Department Summary (cont'd)**

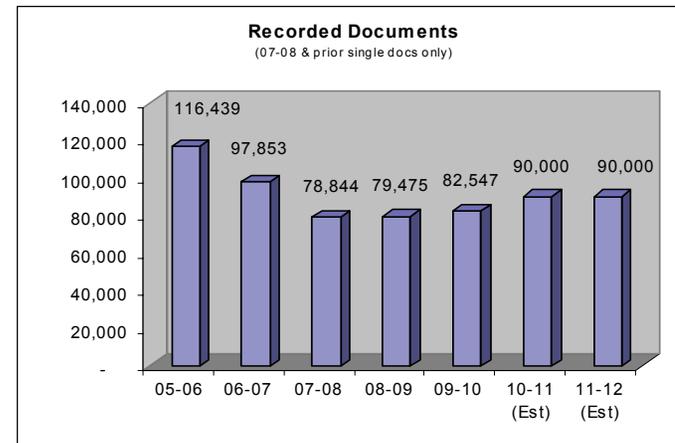
**Activity Indicators**



**Elections:**  
Number and type of elections.



**Elections:**  
Voter registration activities impacted by number and type of elections.

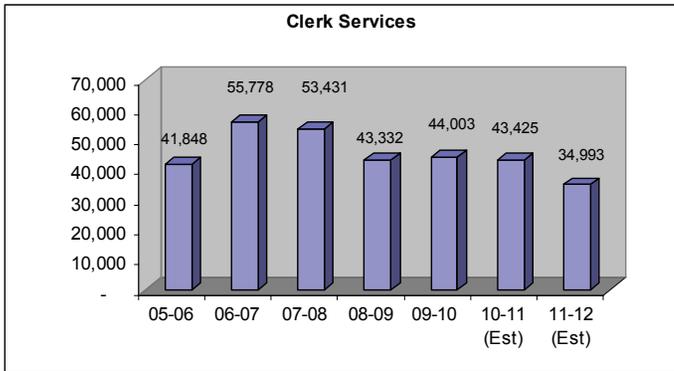


**Clerk-Recorder:**  
Number of recorded documents.

# CLERK-RECORDER-ASSESSOR

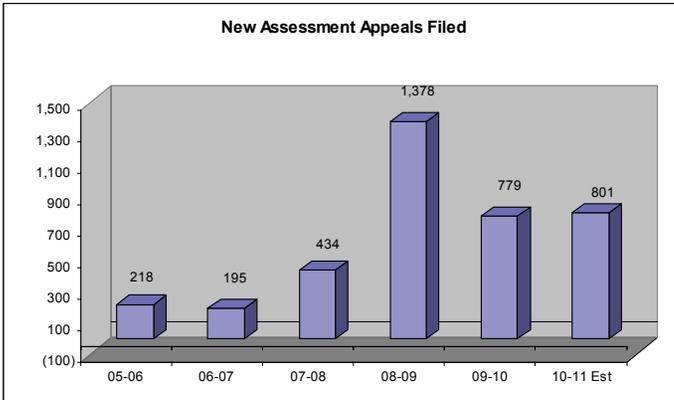
## Department Summary (cont'd)

### Activity Indicators (cont'd)



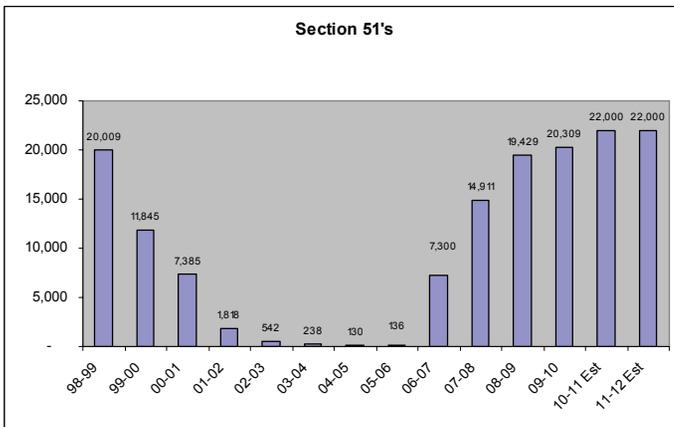
#### Clerk-Recorder:

Number of Clerk services provided, for example marriage licenses, passports, and vital record certified copies. Decrease in FY 11-12 due to discontinuance of passport application services.



#### Assessor:

Number of new assessment appeals filed.



#### Assessor:

Number of Section 51 value reductions which requires property values to be enrolled at the lesser of factored base value or market value.

### Significant Changes (FY 2010-11 Adopted to FY 2010-11 Estimated Actual)

#### Operating

The Fiscal Year 2010-11 Estimated Actual operating expenditures decreased by \$1,913,000, to \$14,697,000, from the Fiscal Year 2010-11 Adopted Budget of \$16,610,000. This 12% decrease is the result of:

- -\$578,000 - less services and supplies costs incurred for the November 2010 General Election from lower than expected sample ballot costs which varies according to the number of measures and contests on the ballot, price reduction by vendor for cost of printing official ballots, less supplies ordered due to use of recycled supplies from previous elections in 2010, and less temporary staff needed due to operating efficiencies created by centralizing all election operations at the new office space at Calle Real;
- -\$439,000 – salaries and benefit savings due to vacancies, mainly in the Assessor Division;
- -\$338,000 – less than anticipated services and supplies costs for the administration of elections from cost efficiencies created by having multiple elections in 2010 and improved operating efficiencies created from consolidating operations at the new elections facility;
- -\$330,000 – savings from lower than anticipated cost of hardware and software maintenance costs for existing systems and deferment of new system purchases, deferring maintenance costs of those new systems;
- -\$228,000 – less than anticipated services and supplies costs for the Special Senate District 15 Run-Off Election.

The Fiscal Year 2010-11 Estimated Actual operating revenues decreased by \$281,000, to \$8,930,000, from the Fiscal Year 2010-11 Adopted Budget of \$9,211,000. This 3% decrease is the result of:

- -\$1,371,000 – unrealized Federal and State reimbursement grants due to deferment of system acquisitions pending the availability of State certified systems;
- +\$626,000 - higher than anticipated net property tax administration costs resulting in higher property tax administration fees allocated to the department;
- +\$365,000 – increase in recording fees from higher than expected document recording volume;
- +\$125,000 – higher than anticipated local agency participation in the November General Election, increasing the amount of costs recoverable from allocation of costs to local agencies;
- -\$94,000 – reimbursement from the State for the cost of the 2009 Statewide Special Election was \$94,000 less than budgeted due to less in actual costs incurred and claimed;
- +\$90,000 – marriage license fees from increase in volume of marriage applications filed and in marriage performance fees due to commencement of marriage ceremony services in the Santa Barbara Clerk-Recorder's Office.

## CLERK-RECORDER-ASSESSOR

### Department Summary (cont'd)

#### Other Financing Uses

The Fiscal Year 2010-11 Estimated Actual other financing uses increased by \$275,000, to \$3,244,000 from the Fiscal Year 2010-11 Adopted Budget of \$2,968,000. This increase is the result of:

- +\$200,000 – increase to the department designation account from Fiscal Year 2010-11 savings in the department for use in Fiscal Year 2011-12 to fund ongoing operating costs;
- +\$75,000 – increase to Clerk-Recorder designation accounts from recording and vital record fees designated for specified uses (as prescribed by law) from unanticipated increase in the volume of those services.

#### Capital

The Fiscal Year 2010-11 Estimated Actual capital expenditures decrease by \$1,586,000, to \$719,000, from the Fiscal Year 2010-11 Adopted Budget of \$2,305,000. This decrease is the result of:

- -\$1,546,000 – deferment of election equipment purchases pending availability of State certified systems.

#### Significant Changes (FY 2010-11 Estimated Actual to FY 2011-12 Recommended)

##### Operating

The Fiscal Year 2011-12 Recommended operating expenditures will increase by \$1,216,000, to \$15,913,000, from the Fiscal Year 2010-11 Estimated Actual of \$14,697,000. This 8% increase is the result of:

- +\$628,000 – net salary and benefit cost increase, including retirement cost increase, for 97.4 funded full time equivalent positions in Fiscal Year 2011-12 compared to 101 projected full time equivalent positions in Fiscal Year 2010-11;
- +\$191,000 – increase in maintenance cost of new election systems, new assessor valuation system, and IT computer hardware;
- +\$146,000 - increase in services and supplies required to conduct the Fiscal Year 2011-12 June Primary Election, compared to the projected cost of Fiscal Year 2010-11 November General Election;
- +\$141,000 – increase in Clerk-Recorder consulting services for automation projects;
- -\$104,000 – decrease in services and supplies from one-time special elections in Fiscal Year 2010-11;
- +\$85,000 – increase for purchase of grant funded election accessibility supplies;
- +\$55,000 – postage costs for increase in voter outreach mailings;
- +\$50,000 – increase in IT consulting services deferred from previous year;
- +\$43,000 – increase in software licensing costs for recorder systems.

The Fiscal Year 2011-12 Recommended operating revenue will decrease by \$1,477,000, to \$7,453,000, from the Fiscal Year 2010-11 Estimated Actual of \$8,930,000. This 17% decrease is the result of:

- -\$1,652,000 – decrease from one-time reimbursement on Fiscal Year 2010-11 for cost of the 2009 Statewide Special Election;
- +\$1,317,000 – election grant reimbursements for acquisition of grant funded election systems;
- -\$636,000 – anticipated decrease in property tax administration fees recoverable by the department due to expected decrease in net property tax administration costs;
- -\$292,000 – decrease in the amount of election costs recoverable from local agencies participating in an election. The Fiscal Year 2011-12 Primary Election has lower local agency participation, compared to the Fiscal Year 2010-11 General Election;
- -\$185,000 – elimination of passport services revenue due to new federal requirement that prohibits clerk-recorder offices that issue certified birth certificates to also process passport applications. Since issuance of birth certificates is an official duty of the Clerk, the Clerk-Recorder's Office had to discontinue passport services;

## CLERK-RECORDER-ASSESSOR

### Department Summary (cont'd)

- -\$150,000 – decrease in reimbursement for State mandated programs (SB90) due to expected decrease in mandated program expenditures;
- +\$100,000 – anticipated increase in supplemental property tax resulting in higher revenue to the County.

#### Use of Prior Fund Balance

The Fiscal Year 2011-12 Recommended use of prior fund balance will increase by \$1,619,000, to \$2,685,000 from the Fiscal Year 2010-11 Estimated Actual of \$1,066,000. The increase is the result of:

- +\$1,944,000 - use of funds from assessor and election account designation balances to absorb budget reductions and maintain adequate service levels;
- -\$561,000 – net increase in use of restricted recorder designation account balances to fund Recorder operations and project costs;
- +\$236,000 – use of the assessor's property tax administration program designation account to fund Fiscal Year 2011-12 required payments on the acquisition of the new Assessor's valuation system;
- -\$147,000 – decrease from use of program restoration designation funds to fund the August 2010 Senate District Special Election in Fiscal Year 2010-11;
- +\$147,000 – increase in use of election designation account funds to purchase election equipment.

#### Capital

The Fiscal Year 2011-12 Recommended capital expenditures will increase by \$1,041,000 to \$1,760,000 from the Fiscal Year 2010-11 Estimated Actual of \$719,000. The increase is the result of:

- +\$1,464,000 – purchase of election equipment and voting system upgrades funded with State and Federal grants;
- -\$402,000 – decrease in Fiscal Year 2011-12 required payments for the acquisition of the new Assessor's valuation system

#### 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 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 2011-12 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 10-11) Accomplishments:

- Completed all secured and unsecured workload by the statutory deadline of June 30<sup>th</sup>, about one month and half later than the previous year's target date due to staffing shortages. A timely submitted assessment roll provides property tax revenue information impacting agencies receiving property tax.
- Completed appraisal work on approximately 10,339 property transfer and new construction events.
- Between July 2010 and February 2011, appraisal staff successfully resolved and closed 487 property assessment appeal cases, preserving 82% of the property value that was at risk given the difference in the applicant's opinion of value and the Assessor's enrolled value.
- Successfully cross-trained certain staff in the Assessor's Office, allowing the Assessor to maximize limited staff resources to complete critical workload. Front office support staff cross trained to perform functions in title transfer operations, title transfer staff cross-trained to perform front office support, and business property appraisers cross-trained to perform real property valuations.
- Completed the minimum 217 business property audits mandated by the State.
- Maintained the number of days it takes to process a supplemental event at approximately 160 days, on average.
- Materially maintained the percentage of Business Property Statements (BPS) electronically filed to 32% from 35% the year before, a process which creates automation of the process. The 3% reduction from prior year is due to a process change that resulted in filer uncertainty. Expect filers to be more familiar with the process in the subsequent year resulting in an increase in the number of e-filings.
- Lowered values on approximately 22,000 parcels per the requirement of Section 51 of the Revenue and Taxation code which requires property values to be enrolled at the lesser of

## CLERK-RECORDER-ASSESSOR

### Department Summary (cont'd)

factored base value or market value. Proactive and timely review of Section 51 requests minimizes re-work associated with roll corrections and minimizes the potential for resource intensive appeals filed by property owners.

- Successfully implemented bar-coding of sixteen different types of forms that upon receipt are scanned and electronically stored with specific metadata, allowing workflow to be better tracked, distributed, completed, and managed.
- Initiated the project to scan all documents in commercial and residential property files by developing and documenting the process for scanning the documents. Identified process barriers created by certain types of documents in the files which must be resolved before scanning property files can be completed.
- Accomplished several aspects of the server consolidation project by eliminating three physical servers, reorganizing file structures within various servers, and completing a strategic plan of various options for business continuity.
- Upgraded various departmental software programs to current versions, such as Microsoft Office and the APEX Drawing Software.
- Completed a review of all 128,000 property mailing addresses for sufficiency and accuracy, reducing the amount of re-work created by returned mail due to insufficient addresses.
- Initiated the implementation of a new property tax assessment and valuation system (CCI Realware System) approved for acquisition by the Board in 2010.

#### Proposed Strategic Actions:

- Complete all secured and unsecured workload by the statutory deadline of June 30th with fewer staff than in the prior year. A timely submitted assessment roll provides property tax revenue information impacting agencies receiving property tax.
- Timely complete all appraisal work on property transfers (sales) and new construction events.
- Maintain or reduce the number of days to process a supplemental event.
- Work towards timely resolving appeal cases filed with the goal of preserving the property value at risk from the difference in the applicant's opinion of value and the Assessor's enrolled value.
- Continue with the project to scan documents in all 130,000 commercial and residential property files to integrate with the document management system.
- Exceed or maintain the previous year rate of Business Property Statements filed electronically through the BPS E-File System.
- Complete all mandatory business audits.
- Timely review all parcels per the requirement of 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. Adequate and timely review of parcels reduces re-work associated with roll

corrections if values are not properly adjusted and reduces the potential for appeal filings that are resource intensive for appraisers.

- Continue with implementation and conversion of data to the new Realware Property Assessment and Valuation System and train all staff on the system.

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

##### Current Year (FY 10-11) Accomplishments:

- Completed document truncation on documents from 2008 to 1996 which by law requires omission of the first five digits of the social security number on any official document recorded since 1980.
- Was the fifth County in the State of California to implement electronic recording. Utilized the delivery system known as SECURE, and implemented six customers for official records recording through SECURE. Electronic document handling creates efficiencies by reducing the level of work associated with cashiering, scanning and mailing recorded documents.
- Initiated project to offer fee-based subscription services to customers for public information in the Recorder's Office (i.e., foreclosure data), increasing responsiveness and accessibility of information to customers.
- Implemented an on-line payment system for web services and customer accounts, in coordination with the Treasurer Tax Collector.
- Materially completed review of fee based Clerk-Recorder services to ensure fees are aligned with the cost of providing the services.
- As part of the mandate to preserve photographically reproducible records, restored three archival maps from the late 1800's, including the first cemetery established in Santa Barbara County.
- Moved the on-line marriage license application system to the web, allowing customers to submit their applications on-line, increasing the level of customer service, convenience, and responsiveness to customers.
- Partnered with County Parks and General Services to inform on and promote marriage services available through the County, including the application of marriage licenses, marriage sites (i.e., Sunken Gardens), marriage ceremony performances, and issuance of marriage certificates.
- Phased out passport services by March 2011 to comply with new federal regulations that prohibit county clerk offices that issue certified birth certificates to also issue passport applications.
- With a reduction in fulltime equivalent positions from the previous year, managed to timely record an estimated 7,000 increase in document recordings from the previous year.

## CLERK-RECORDER-ASSESSOR

### Department Summary (cont'd)

- Implemented scanning of documentary transfer tax affidavits filed in the Recorder's Office into the Assessor's document management system (laserfiche) to improve sharing of information useful to appraisers in property valuation and to identify potentially underpaid transfer tax.

#### Proposed Strategic Actions:

- Complete document truncation on all documents from 1996 to 1980. Law requires omission of the first five digits of the social security number on any official document recorded since 1980.
- Increase the number of electronic recording customers (specifically local title companies) and the number of documents submitted for recording through the electronic recording deliver system known as SECURE from 20 percent to over 25 percent by June 30, 2012. Electronic recording creates document handling efficiencies by reducing the level of work associated with scanning documents received and mailing back recorded documents to customers
- Continue working towards establishing and implementing a fee-based customer subscription service for public information in the Recorder's Office (i.e., foreclosure data) increasing responsiveness and accessibility of information to customers.
- Continue towards creating and implementing an on-line payment system for e-electronic recording, subscriptions services, and other on-line services.
- Based on the Clerk-Recorder cost recovery study performed on fee based services in Fiscal Year 2010-11, implement the updated Clerk-Recorder fees by July 1, 2011.
- Continue to restore archival maps or birth certificate books from the 1800's, as part of the mandate to store and preserve photographically reproducible records.
- Complete the re-scan and replacement of sealed or amended birth, death, and marriage certificates from 1850 to 1988 to comply with the mandate to delete adopted birth information and other court ordered name changes.

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

#### Current Year (FY 10-11) Accomplishments:

- The elections office previously located on Victoria Street was successfully relocated to the facility at Calle Real. The new facility space accommodates centralized election operations and storage, improving operational efficiencies and saving the County from having to obtain expensive leased space to accommodate vote-by-mail processing.
- Successfully conducted a special election for the Montecito Fire Protection District, timely completing the election canvass and certification of the election results and receiving reimbursement for the cost of the election.

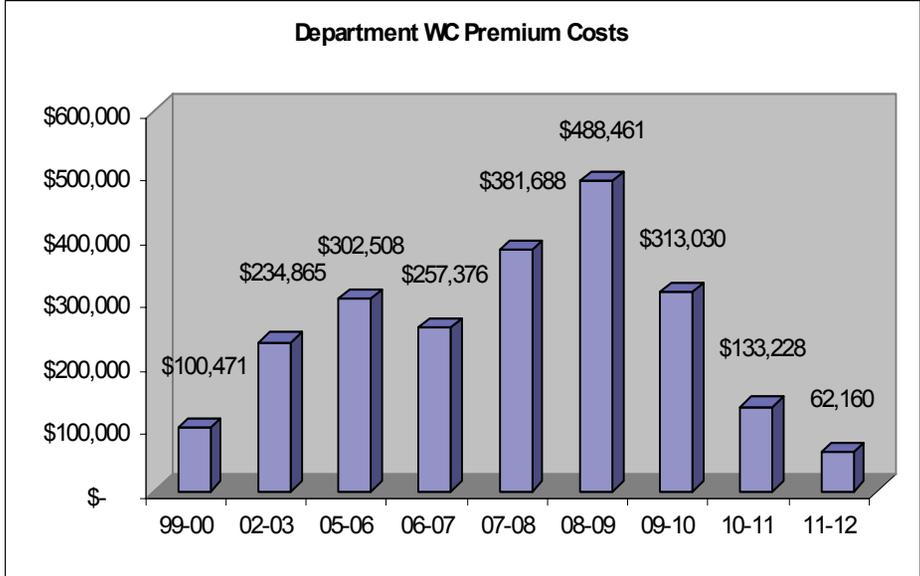
- Successfully conducted the mandated November 2010 Gubernatorial General Election, timely completing the election canvass and certification of the election results by the 28<sup>th</sup> day after the election, and materially maintaining the voter turnout rate in the last comparable election.
- Successfully conducted the State mandated Special Senate District 15 Run-Off Election, timely completing the election canvass and certification of the election results.
- Materially participated in a comprehensive review of fee based services to ensure fees are aligned with the cost of providing those services.

#### Proposed Strategic Actions:

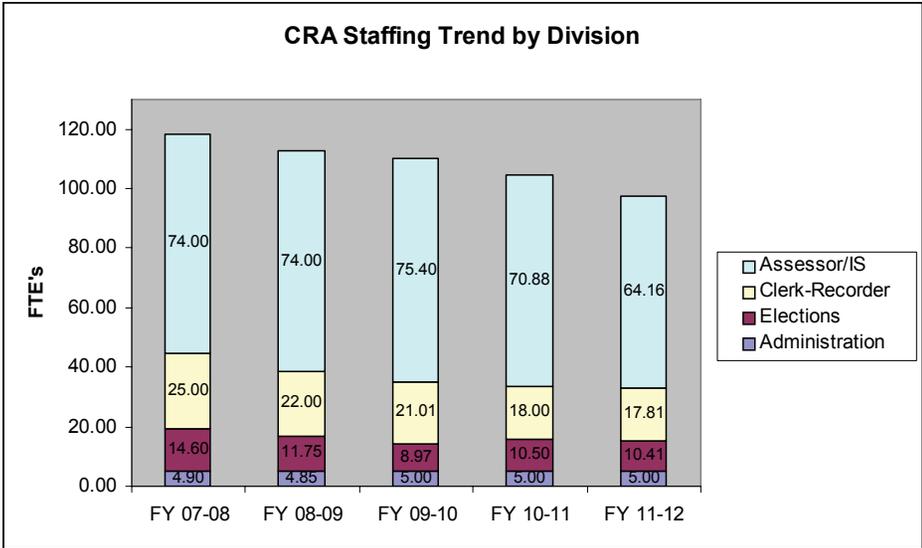
- Successfully conduct the mandated statewide Direct Primary Election and timely complete the election canvass and certification of the election results by the 28<sup>th</sup> day after the election, and materially maintain or increase the voter turnout rate in the last comparable election.
- Coordinate funding for and successfully conduct the potential Presidential Primary Election and timely complete the election canvass and certification of the election results by the 28<sup>th</sup> day after the election, and materially maintain or increase the voter turnout rate in the last comparable election.
- Accurately and timely complete the mandated redistricting process by modifying precinct boundaries to align with the new district boundaries for the State Board of Equalization, State Senate, U.S. Congressional, State Assembly, and County Supervisor Districts.
- Based on the Elections Division cost recovery study performed in Fiscal Year 2010-11 for fee based services, implement the proposed service fees and charges by July 1, 2011.
- Continue identifying and researching options to acquire a new vote tabulation system to replace the aging and outdated fleet of systems that have exceeded their useful life. The goal is to identify and procure a system prior to the expiration of potential grant funds.
- Continue to 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 is required for district or precinct recounts. Automation of this process will make this labor intensive process more efficient creating savings in staff resources.

**CLERK-RECORDER-ASSESSOR**  
 Department Summary (cont'd)

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Department-wide Effectiveness Measures</b>				
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
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



By raising staff awareness, promoting workplace safety, and implementing ergonomic solutions, the department has reduced the number of workplace related injuries and workers compensation claims filed, significantly reducing the cost of the County's workers compensation premium to the department.



Since Fiscal Year 2007-08, the department has incurred an 18% reduction in staff.

**CLERK-RECORDER-ASSESSOR**

**Administration**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Use of Funds Summary</b>				
<i>Operating Expenditures</i>				
Administration	\$ 887,294	\$ 963,666	\$ 952,359	\$ 982,809
Expenditure Total	887,294	963,666	952,359	982,809
<i>Other Financing Uses</i>				
Operating Transfers	1,716	1,716	1,716	--
Division Total	\$ 889,010	\$ 965,382	\$ 954,075	\$ 982,809

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Character of Expenditures</b>				
<i>Operating Expenditures</i>				
Regular Salaries	620,757	602,569	620,340	594,350
Overtime	109	100	59	--
Benefits	219,084	251,705	239,518	273,788
Salaries & Benefits Sub-Total	839,950	854,374	859,917	868,138
Services & Supplies	47,344	109,292	92,442	114,671
Expenditure Total	\$ 887,294	\$ 963,666	\$ 952,359	\$ 982,809

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Source of Funds Summary</b>				
<i>Departmental Revenues</i>				
Revenue Total	\$ --	\$ --	\$ --	\$ --
<i>General Fund Contribution</i>				
Division Total	\$ 889,010	\$ 965,382	\$ 954,075	\$ 982,809

Actual FY 09-10		Adopted FY 10-11		Est. Actual FY 10-11		Recommended FY 11-12	
Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
<b>Position Summary</b>							
<i>Permanent</i>							
Administration	5.0	5.0	5.0	5.0	5.0	5.0	5.0
Total Positions	5.0	5.0	5.0	5.0	5.0	5.0	5.0

**Significant Changes (FY 2010-11 Adopted to FY 2010-11 Estimated Actual)**

The Fiscal Year 2010-11 Estimated Actual operating expenditures decreased by \$11,000, to \$952,000, from the Fiscal Year 2010-11 Adopted Budget of \$964,000. This 1% decrease is the result of:

- -\$11,000 –deferment of computer and office equipment replacements and savings in miscellaneous services and supplies.

**Significant Changes (FY 2010-11 Estimated Actual to FY 2011-12 Recommended)**

The Fiscal Year 2011-12 Recommended operating expenditures will increase by \$30,000 to \$983,000, from the Fiscal Year 2010-11 Estimated Actual of \$952,000. This 3% increase is the result of:

- +\$9,000 - increase in departmental software licensing costs;
- +\$8,000 – increase in salary and benefit cost, including retirement cost increase for 5.0 full-time equivalent positions;
- +\$7,000 – net increase in miscellaneous services and supplies;
- +\$6,000 - increase for upgrades and/or replacements of office and computer equipment.

**SERVICE DESCRIPTION**

The Administration Division is primarily responsible for budgeting, accounting, personnel and overall departmental management and administration. 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.

**Recurring Performance Measures**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
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%	85%	100%
	106	112	106	97
	127	112	125	97
As an efficient and responsive government, the Clerk-Recorder-Assessor Department will reduce or maintain the rate of General Liability claims filed from the previous actual claims filed.	250%	40%	40%	0%
	5	2	2	0
	2	5	5	2
As an efficient and responsive government, the Clerk-Recorder-Assessor Department will reduce or maintain the rate of Workers' Compensation claims filed from the previous year's actual claims filed.	100%	0%	0%	
	2	0	0	0
	2	1	2	0
As an efficient and responsive government, the County will maintain a productive workforce through a Countywide Lost Time Rate of 5.9% or less.	4.3%	5.9%	3.9%	4.0%
	9,214.0	12,812.0	7,874.0	8,070.0
	212,150.0	217,152.0	199,390.0	201,760.0

**CLERK-RECORDER-ASSESSOR**

**Administration (cont'd)**

	Actual FY 09-10 Pos.	Adopted FY 10-11 Pos.	Est. Actual FY 10-11 Pos.	Recommended FY 11-12 Pos.
<b>Position Detail</b>				
<b>Administration</b>				
Asst Director	1.0	1.0	1.0	1.0
County Clk-Rec-Assessor	1.0	1.0	1.0	1.0
Fiscal Manager	1.0	1.0	1.0	1.0
HR Manager	1.0	1.0	1.0	1.0
Financial Office Pro	1.0	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**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Use of Funds Summary</b>				
<i>Operating Expenditures</i>				
Elections Administration	\$ 1,405,730	\$ 1,397,821	\$ 1,456,991	\$ 1,758,684
Scheduled Elections	1,748,917	2,360,128	1,471,068	1,794,676
Special Elections	154,892	550,848	155,207	--
Operating Total	3,309,539	4,308,797	3,083,266	3,553,360
<i>Non-Operating Expenditures</i>				
Capital Assets	--	1,546,500	--	1,464,000
Expenditure Total	3,309,539	5,855,297	3,083,266	5,017,360
<i>Other Financing Uses</i>				
Operating Transfers	255,880	214,182	214,182	207,968
Designated for Future Uses	113,124	1,373,000	1,373,000	--
Division Total	<u>\$ 3,678,543</u>	<u>\$ 7,442,479</u>	<u>\$ 4,670,448</u>	<u>\$ 5,225,328</u>

**Character of Expenditures**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<i>Operating Expenditures</i>				
Regular Salaries	791,263	866,893	767,123	840,694
Overtime	78,355	107,000	78,592	79,000
Extra Help	120,560	151,000	123,960	137,328
Benefits	340,266	367,799	366,073	432,397
Salaries & Benefits Sub-Total	1,330,444	1,492,692	1,335,748	1,489,419
Services & Supplies	1,979,095	2,816,105	1,747,518	2,063,941
Operating Total	3,309,539	4,308,797	3,083,266	3,553,360
<i>Non-Operating Expenditures</i>				
Capital Assets	--	1,546,500	--	1,464,000
Expenditure Total	<u>\$ 3,309,539</u>	<u>\$ 5,855,297</u>	<u>\$ 3,083,266</u>	<u>\$ 5,017,360</u>

**Source of Funds Summary**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<i>Departmental Revenues</i>				
Federal & State Revenues	\$ 751,022	\$ 3,744,867	\$ 2,273,987	\$ 1,826,697
Other Charges for Services	74,488	240,000	352,839	49,759
Revenue Total	825,510	3,984,867	2,626,826	1,876,456
<i>General Fund Contribution</i>	2,662,823	2,031,341	1,896,138	2,256,924
<i>Other Financing Sources</i>				
Operating Transfers	50,047	--	--	--
Use of Prior Fund Balances	140,163	1,426,271	147,484	1,091,948
Division Total	<u>\$ 3,678,543</u>	<u>\$ 7,442,479</u>	<u>\$ 4,670,448</u>	<u>\$ 5,225,328</u>

	Actual FY 09-10		Adopted FY 10-11		Est. Actual FY 10-11		Recommended FY 11-12	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
<b>Position Summary</b>								
<i>Permanent</i>								
Elections Administration	9.0	5.6	10.0	4.0	10.0	5.6	18.0	6.4
Scheduled Elections	9.0	4.7	8.0	6.5	8.0	7.3	--	4.1
Special Elections	--	0.3	--	--	--	0.8	--	--
Total Permanent	18.0	10.6	18.0	10.5	18.0	13.7	18.0	10.4
<i>Non-Permanent</i>								
Extra Help	--	4.1	--	--	--	8.6	--	--
Total Positions	18.0	14.7	18.0	10.5	18.0	22.2	18.0	10.4

**Significant Changes (FY 2010-11 Adopted to FY 2010-11 Estimated Actual)**

The Fiscal Year 2010-11 Estimated Actual operating expenditures decreased by \$1,226,000, to \$3,083,000, from the Fiscal Year 2010-11 Adopted Budget of \$4,309,000. This 28% decrease is the result of:

- -\$615,000 - less services and supplies costs incurred for the November 2010 General Election from lower than expected sample ballot costs which varies according to the number of measures and contests on the ballot, price reduction by vendor for cost of printing official ballots, less supplies ordered due to use of recycled supplies from previous elections in 2010, and less temporary staff needed due to operating efficiencies created by centralizing all election operations at the new office space at Calle Real;
- -\$424,000 – less than anticipated cost of conducting the Special Senate District 15 Run-Off Election;
- -\$70,000 – reduction in postage from lower voter outreach mailings;
- -\$63,000 – less computer hardware and software costs from deferment of new election system acquisitions;
- -\$54,000 – net savings in miscellaneous services and supplies.

**Significant Changes (FY 2010-11 Estimated Actual to FY 2011-12 Recommended)**

The Fiscal Year 2011-12 Recommended operating expenditures will increase by \$470,000, to \$3,553,000, from the Fiscal Year 2010-11 Estimated Actual of \$3,083,000. This 15% increase is the result of:

- +\$184,000 - increase in services and supplies required to conduct the Fiscal Year 2011-12 June Primary Election, compared to the projected cost of Fiscal Year 2010-11 November General Election;
- +\$154,000 – increase in salary and benefit costs, including retirement cost increase, for 10.4 permanent fulltime equivalent positions;

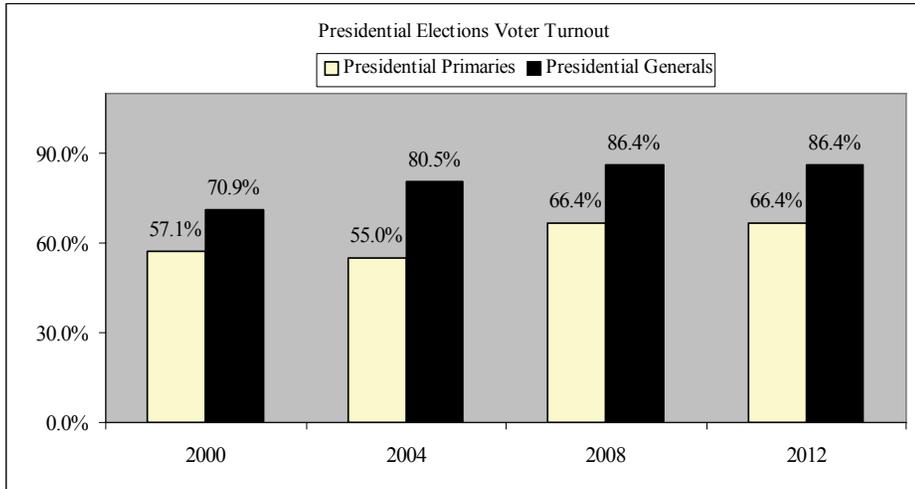
**SERVICE DESCRIPTION**

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

- -\$104,000 – decrease in services and supplies from special elections in Fiscal Year 2010-11;
- +\$85,000 – increase in purchase of grant funded election accessibility supplies;
- +\$62,000 – increase in software and hardware maintenance cost of new election systems;
- +\$55,000 – postage costs for increase in voter outreach mailing;
- +\$24,000 – net increase in miscellaneous services and supplies;
- +\$10,000 – increase in utilities at the new election office space.

**Recurring Performance Measures**

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

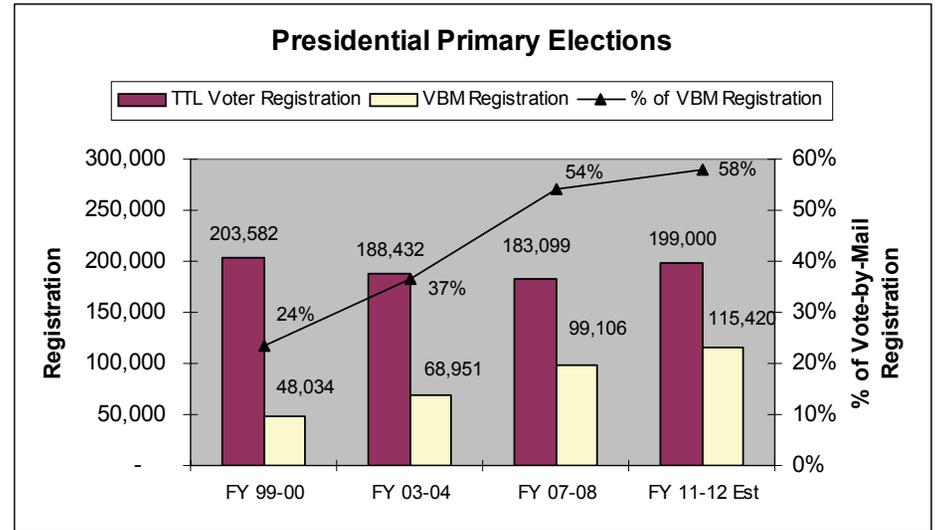


**CLERK-RECORDER-ASSESSOR**

**Elections (cont'd)**

**Recurring Performance Measure (cont'd)**

Through voter outreach efforts and voter file maintenance, increase or maintain the percentage of registered vote-by-mail voters in comparable elections, leading to increased voter participation.



	Actual FY 09-10 Pos.	Adopted FY 10-11 Pos.	Est. Actual FY 10-11 Pos.	Recommended FY 11-12 Pos.
<b>Position Detail</b>				
<b>Elections Administration</b>				
Division Manager	2.0	2.0	2.0	2.0
Admin Office Pro	7.0	8.0	8.0	15.0
Computer Systems Specialist	--	--	--	1.0
Sub-Division Total	9.0	10.0	10.0	18.0
<b>Scheduled Elections</b>				
Admin Office Pro	8.0	7.0	7.0	--
Computer Systems Specialist	1.0	1.0	1.0	--
Sub-Division Total	9.0	8.0	8.0	--
<b>Division Total</b>	<b>18.0</b>	<b>18.0</b>	<b>18.0</b>	<b>18.0</b>

**CLERK-RECORDER-ASSESSOR**

**County Clerk-Recorder**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Use of Funds Summary</b>				
<i>Operating Expenditures</i>				
County Clerk-Recorder	\$ 2,549,388	\$ 2,475,072	\$ 2,439,887	\$ 2,708,278
Operating Total	2,549,388	2,475,072	2,439,887	2,708,278
<i>Non-Operating Expenditures</i>				
Capital Assets	38,309	--	--	20,000
Expenditure Total	2,587,697	2,475,072	2,439,887	2,728,278
<i>Other Financing Uses</i>				
Operating Transfers	1,158,863	469,827	469,825	200,702
Designated for Future Uses	746,033	904,613	979,905	274,338
Division Total	\$ 4,492,593	\$ 3,849,512	\$ 3,889,617	\$ 3,203,318

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Character of Expenditures</b>				
<i>Operating Expenditures</i>				
Regular Salaries	1,277,908	1,167,170	1,211,489	1,253,507
Overtime	(1,285)	--	71	--
Extra Help	7,339	--	74,000	70,000
Benefits	669,558	628,294	641,674	659,103
Salaries & Benefits Sub-Total	1,953,520	1,795,464	1,927,234	1,982,610
Services & Supplies	595,868	679,608	512,653	725,668
Operating Total	2,549,388	2,475,072	2,439,887	2,708,278
<i>Non-Operating Expenditures</i>				
Capital Assets	38,309	--	--	20,000
Expenditure Total	\$ 2,587,697	\$ 2,475,072	\$ 2,439,887	\$ 2,728,278

**Source of Funds Summary**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<i>Departmental Revenues</i>				
Interest	\$ 1,498	\$ --	\$ --	\$ --
Federal & State Revenues	3,039	--	--	--
Recording Fees	1,433,008	1,600,000	1,965,000	1,950,000
Other Charges for Services	790,991	752,000	802,000	621,500
Miscellaneous Revenue	184,166	165,000	204,521	205,000
Revenue Total	2,412,702	2,517,000	2,971,521	2,776,500
<i>General Fund Contribution</i>	366,091	62,197	--	--
<i>Other Financing Sources</i>				
Operating Transfers	--	--	--	70,000
Sale of Property	2,500	--	--	--
Use of Prior Fund Balances	1,711,300	1,270,315	918,096	356,818
Division Total	\$ 4,492,593	\$ 3,849,512	\$ 3,889,617	\$ 3,203,318

	Actual FY 09-10		Adopted FY 10-11		Est. Actual FY 10-11		Recommended FY 11-12	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
<b>Position Summary</b>								
<i>Permanent</i>								
County Clerk-Recorder	26.0	19.4	23.0	18.0	23.0	17.0	23.0	17.8
Total Permanent	26.0	19.4	23.0	18.0	23.0	17.0	23.0	17.8
<i>Non-Permanent</i>								
Extra Help	--	0.3	--	--	--	2.5	--	--
Total Positions	26.0	19.7	23.0	18.0	23.0	19.5	23.0	17.8

**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 2010-11 Adopted to FY 2010-11 Estimated Actual)**

The Fiscal Year 2010-11 Estimated Actual operating expenditures decreased by \$35,000 to \$2,440,000, from the Fiscal Year 2010-11 Adopted Budget of \$2,475,000. This 1% decrease is the result of:

- -\$140,000 – lower than projected software maintenance and licensing costs of Recorder systems;
- +\$132,000 – increase in salary and benefit costs for additional staff required to assist with higher than expected document recording workload and automation projects;
- -\$18,000 – savings in office supplies from annual fluctuations in supplies inventory and staff levels.

**Significant Changes (FY 2010-11 Estimated Actual to FY 2011-12 Recommended)**

The Fiscal Year 2011-12 Recommended operating expenditures will increase by \$268,000 to \$2,708,000, from the Fiscal Year 2010-11 Estimated Actual of \$2,440,000. This 11% increase is the result of:

- +\$141,000 – increase in project consulting services for Recorder automation projects;
- +\$55,000 – increase in salary and benefit costs, including retirement cost increase, for 17.8 permanent fulltime equivalent positions;
- +\$43,000 – increase in recorder software licensing costs;
- +\$29,000 – increase in office supplies and other miscellaneous services and supplies.

**CLERK-RECORDER-ASSESSOR**

**County Clerk-Recorder (cont'd)**

	<u>Actual FY 09-10</u>	<u>Adopted FY 10-11</u>	<u>Est. Actual FY 10-11</u>	<u>Recommended FY 11-12</u>
<b>Recurring Performance Measures</b>				
<b>County Clerk-Recorder</b>				
Ensure timely recordation of Reconveyances by recording Reconveyances received within 2 business days of receipt (excludes e-recordings).	99% 13,723 13,802	90% 13,050 14,500	100% 14,804 14,845	100% 14,000 14,000
Ensure timely recordation of title company official records by recording the documents received the same business day (excludes e-recordings).	100% 34,379 34,379	100% 36,160 36,160	100% 35,643 35,643	100% 36,000 36,000
Ensure timely processing of official records by recording and mailing documents received within 7 business days of receipt of document (single documents/excludes e-recordings).	100% 73,708 73,859	95% 78,850 83,000	100% 76,920 77,032	100% 77,000 77,000

	<u>Actual FY 09-10 Pos.</u>	<u>Adopted FY 10-11 Pos.</u>	<u>Est. Actual FY 10-11 Pos.</u>	<u>Recommended FY 11-12 Pos.</u>
<b>Position Detail</b>				
<b>County Clerk-Recorder</b>				
Division Manager	1.0	1.0	1.0	1.0
Project Manager	1.0	1.0	1.0	1.0
Systems & Programming Analyst	1.0	1.0	1.0	1.0
Admin Office Pro	21.0	17.0	17.0	19.0
Financial Office Pro	1.0	1.0	1.0	1.0
Management Specialist	1.0	--	--	--
Sub-Division Total	<u>26.0</u>	<u>21.0</u>	<u>21.0</u>	<u>23.0</u>
Division Total	<u>26.0</u>	<u>23.0</u>	<u>23.0</u>	<u>23.0</u>

**CLERK-RECORDER-ASSESSOR**

**Information Systems**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Use of Funds Summary</b>				
<i>Operating Expenditures</i>				
IS Development & Maintenance	\$ 1,248,271	\$ 1,292,137	\$ 1,250,775	\$ 1,303,950
LAN Administration	349,938	373,421	368,331	327,266
Operating Total	1,598,209	1,665,558	1,619,106	1,631,216
<i>Non-Operating Expenditures</i>				
Capital Assets	248,791	120,000	718,645	276,364
Division Total	<u>\$ 1,847,000</u>	<u>\$ 1,785,558</u>	<u>\$ 2,337,751</u>	<u>\$ 1,907,580</u>

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Character of Expenditures</b>				
<i>Operating Expenditures</i>				
Regular Salaries	946,503	943,070	956,838	929,424
Overtime	1,032	--	2,500	--
Extra Help	2,685	--	--	--
Benefits	365,285	409,960	415,701	453,755
Salaries & Benefits Sub-Total	1,315,505	1,353,030	1,375,039	1,383,179
Services & Supplies	282,704	312,528	244,067	248,037
Operating Total	1,598,209	1,665,558	1,619,106	1,631,216
<i>Non-Operating Expenditures</i>				
Capital Assets	248,791	120,000	718,645	276,364
Expenditure Total	<u>\$ 1,847,000</u>	<u>\$ 1,785,558</u>	<u>\$ 2,337,751</u>	<u>\$ 1,907,580</u>

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Source of Funds Summary</b>				
<i>Departmental Revenues</i>				
Revenue Total	\$ --	\$ --	\$ --	\$ --
<i>General Fund Contribution</i>				
	1,598,209	1,705,558	2,337,751	1,671,216
<i>Other Financing Sources</i>				
Use of Prior Fund Balances	248,791	80,000	--	236,364
Division Total	<u>\$ 1,847,000</u>	<u>\$ 1,785,558</u>	<u>\$ 2,337,751</u>	<u>\$ 1,907,580</u>

	Actual FY 09-10		Adopted FY 10-11		Est. Actual FY 10-11		Recommended FY 11-12	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
<b>Position Summary</b>								
<i>Permanent</i>								
IS Development & Maintenance	8.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0
LAN Administration	2.0	2.5	2.0	2.5	2.0	2.0	2.0	1.9
Total Permanent	10.0	9.5	9.0	9.5	9.0	9.0	9.0	8.9
<i>Non-Permanent</i>								
Extra Help	--	0.1	--	--	--	--	--	--
Total Positions	10.0	9.6	9.0	9.5	9.0	9.0	9.0	8.9

**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 2010-11 Adopted to FY 2010-11 Estimated Actual)**

The Fiscal Year 2010-11 Estimated Actual operating expenditures decreased by \$47,000 to \$1,619,000, from the Fiscal Year 2010-11 Adopted Budget of \$1,666,000. This 3% decrease is the result of:

- -\$21,000 – lower than anticipated computer and office equipment maintenance costs;
- -\$16,000 – lower outsourcing of IT projects, reducing or deferring current year consulting services;
- -\$10,000 – lower training and travel expenditures and decrease in miscellaneous services and supplies.

**Significant Changes (FY 2010-11 Estimated Actual to FY 2011-12 Recommended)**

The Fiscal Year 2011-12 Recommended operating expenditures will increase by \$12,000, to \$1,631,000 from the Fiscal Year 2010-11 Estimated Actual of \$1,619,000. This 1% increase is the result of:

- -\$150,000 – decrease in mainframe support service contribution;
- +\$129,000 – increase in software maintenance costs, mainly for the new Assessor's valuation system;
- +\$8,000 – increase in salary and benefit costs, including retirement cost increase, for 8.9 fulltime equivalent positions.

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

	Actual FY 09-10 <u>Pos.</u>	Adopted FY 10-11 <u>Pos.</u>	Est. Actual FY 10-11 <u>Pos.</u>	Recommended FY 11-12 <u>Pos.</u>
<b>Position Detail</b>				
<b>IS Development &amp; Maintenance</b>				
Project Manager	1.0	1.0	1.0	1.0
Systems & Programming Analyst	<u>7.0</u>	<u>6.0</u>	<u>6.0</u>	<u>6.0</u>
Sub-Division Total	8.0	7.0	7.0	7.0
<b>LAN Administration</b>				
EDP Office Auto Specialist	1.0	1.0	1.0	1.0
Computer Systems Specialist	<u>1.0</u>	<u>1.0</u>	<u>1.0</u>	<u>1.0</u>
Sub-Division Total	2.0	2.0	2.0	2.0
Division Total	<u>10.0</u>	<u>9.0</u>	<u>9.0</u>	<u>9.0</u>

**CLERK-RECORDER-ASSESSOR**

**Assessor**

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Use of Funds Summary</b>				
<i>Operating Expenditures</i>				
Operations	\$ 1,980,278	\$ 2,346,444	\$ 2,189,491	\$ 2,351,006
Real Property	2,036,161	2,244,936	2,019,026	2,064,991
Business/Minerals	2,688,584	2,605,536	2,393,584	2,621,616
Operating Total	6,705,023	7,196,916	6,602,101	7,037,613
<i>Non-Operating Expenditures</i>				
Capital Assets	--	638,645	--	--
Expenditure Total	6,705,023	7,835,561	6,602,101	7,037,613
<i>Other Financing Uses</i>				
Operating Transfers	5,028	5,028	5,028	--
Designated for Future Uses	--	--	199,906	--
Division Total	<u>\$ 6,710,051</u>	<u>\$ 7,840,589</u>	<u>\$ 6,807,035</u>	<u>\$ 7,037,613</u>

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Character of Expenditures</b>				
<i>Operating Expenditures</i>				
Regular Salaries	4,130,541	4,443,432	4,132,686	4,250,216
Overtime	10,959	--	5,600	--
Extra Help	3,263	--	--	--
Benefits	2,046,827	2,035,813	1,899,111	2,189,296
Salaries & Benefits Sub-Total	6,191,590	6,479,245	6,037,397	6,439,512
Services & Supplies	513,433	717,671	564,704	598,101
Operating Total	6,705,023	7,196,916	6,602,101	7,037,613
<i>Non-Operating Expenditures</i>				
Capital Assets	--	638,645	--	--
Expenditure Total	<u>\$ 6,705,023</u>	<u>\$ 7,835,561</u>	<u>\$ 6,602,101</u>	<u>\$ 7,037,613</u>

	Actual FY 09-10	Adopted FY 10-11	Est. Actual FY 10-11	Recommended FY 11-12
<b>Source of Funds Summary</b>				
<i>Departmental Revenues</i>				
Federal & State Revenues	\$ 952	\$ --	\$ --	\$ --
Property Tax Administration Fee	2,086,042	2,190,000	2,816,000	2,180,000
Supplemental Administration Fee	524,442	500,000	500,000	600,000
Other Charges for Services	15,978	--	--	--
Miscellaneous Revenue	17,820	19,000	16,000	20,000
Revenue Sub-Total	2,645,234	2,709,000	3,332,000	2,800,000
Less: Intra-County Revenues	(1,083)	--	--	--
Revenue Total	2,644,151	2,709,000	3,332,000	2,800,000
<i>General Fund Contribution</i>				
	3,558,897	3,898,521	3,475,035	3,237,613
<i>Other Financing Sources</i>				
Use of Prior Fund Balances	505,920	1,233,068	--	1,000,000
Division Total	<u>\$ 6,708,968</u>	<u>\$ 7,840,589</u>	<u>\$ 6,807,035</u>	<u>\$ 7,037,613</u>

	Actual FY 09-10		Adopted FY 10-11		Est. Actual FY 10-11		Recommended FY 11-12	
	Pos.	FTE	Pos.	FTE	Pos.	FTE	Pos.	FTE
<b>Position Summary</b>								
<i>Permanent</i>								
Operations	22.0	19.5	22.0	22.0	22.0	18.6	23.0	19.9
Real Property	18.0	15.9	22.0	17.0	22.0	16.6	26.3	15.0
Business/Minerals	27.0	23.2	27.0	22.4	27.0	21.3	21.8	20.4
Total Permanent	67.0	58.5	71.0	61.4	71.0	56.5	71.0	55.2
<i>Non-Permanent</i>								
Contract	--	0.7	--	--	--	1.0	--	--
Extra Help	--	0.1	--	--	--	--	--	--
Total Positions	<u>67.0</u>	<u>59.3</u>	<u>71.0</u>	<u>61.4</u>	<u>71.0</u>	<u>57.5</u>	<u>71.0</u>	<u>55.2</u>

**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 also defends property valuations under appeal before the Assessment Appeals Board.

**Significant Changes (FY 2010-11 Adopted to FY 2010-11 Estimated Actual)**

The Fiscal Year 2010-11 Estimated Actual operating expenditures decreased by \$595,000 to \$6,602,000, from the Fiscal Year 2010-11 Adopted Budget of \$7,197,000. This 8% decrease is the result of:

- -\$442,000 – net decrease in salary and benefit costs from positions held vacant in anticipation of Fiscal Year 2011-12 budget constraints;
- -\$108,000 – software maintenance cost savings in current fiscal year on the new assessor valuation system due to deferment of software maintenance commencement date.
- -\$17,000 –net decrease in miscellaneous services and supplies and cost of telephone services;
- -\$15,000 - decrease in consulting services from less outsourcing of technology projects;
- -\$13,000 - decrease from deferment of computer hardware replacements.

**Significant Changes (FY 2010-11 Estimated Actual to FY 2011-12 Recommended)**

The Fiscal Year 2011-12 Recommended operating expenditures will increase by \$436,000, to \$7,038,000, from the Fiscal Year 2010-11 Estimated Actual of \$6,602,000. This 7% increase is the result of:

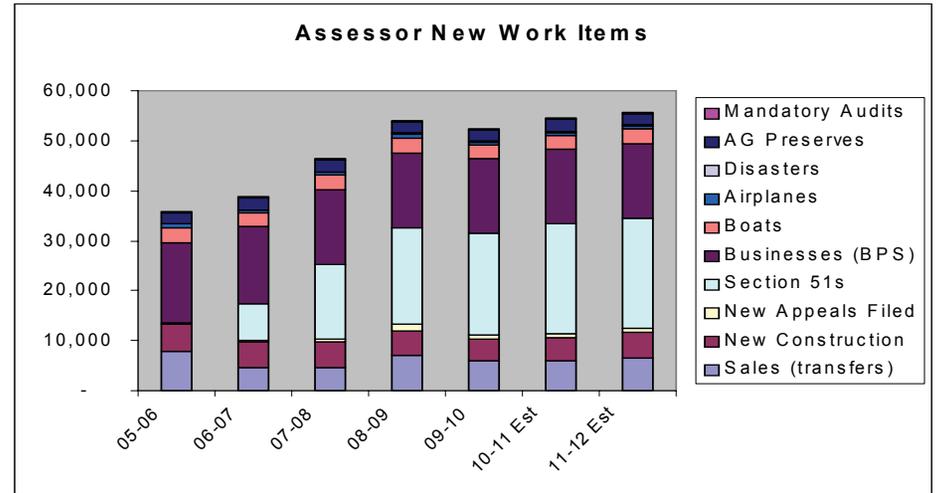
- +\$402,000 – increase in salary and benefit costs, including retirement cost increase, for 55.2 fulltime equivalent positions;
- +\$15,000 – IT consulting services for Assessor systems;
- +\$12,000 – computer hardware purchases and replacements;
- +\$7,000 – net increase in miscellaneous services and supplies.

**CLERK-RECORDER-ASSESSOR**

**Assessor (cont'd)**

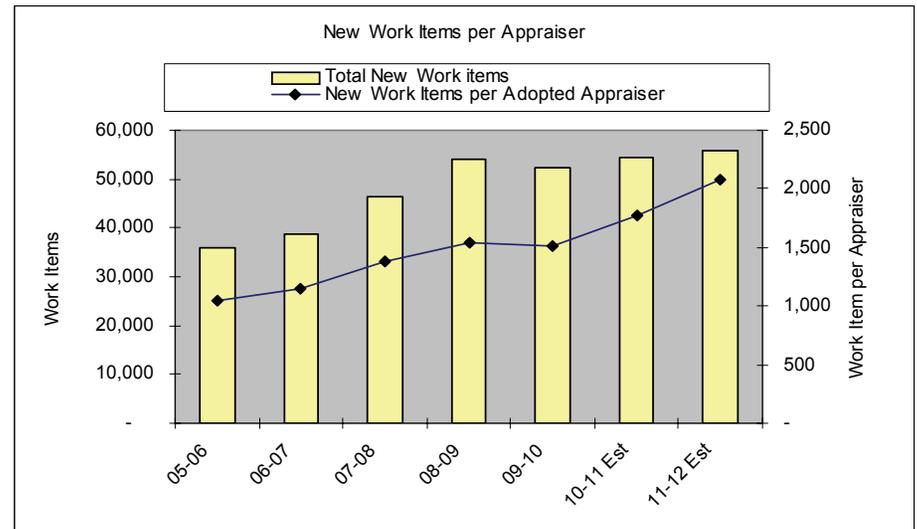
**Recurring Performance Measures**

Per Revenue and Taxation Code 616, complete the local assessment roll by processing 100% of assessment work item.



Note: Not a comprehensive list of all work items.

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

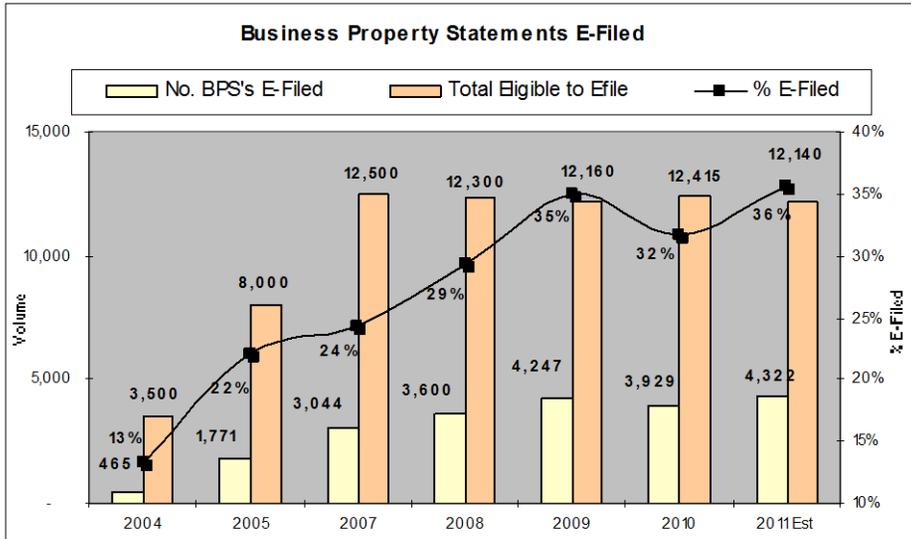


## CLERK - RECORDER - ASSESSOR

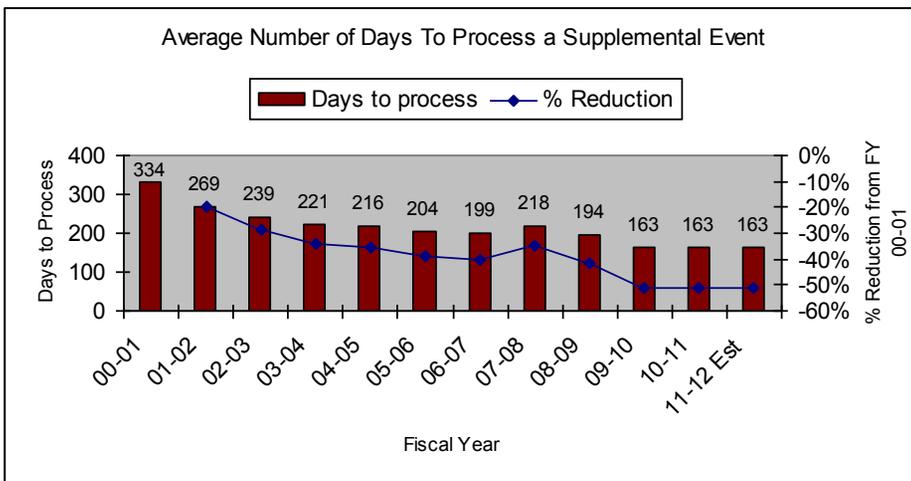
### Assessor (cont'd)

#### Recurring Performance Measures (cont'd)

Create processing efficiencies by increasing or maintaining the number of Business Property Statements electronically filed.



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



Actual FY 09-10 Pos.	Adopted FY 10-11 Pos.	Est. Actual FY 10-11 Pos.	Recommended FY 11-12 Pos.
----------------------------	-----------------------------	---------------------------------	---------------------------------

#### Position Detail

##### Operations

Division Manager	1.0	1.0	1.0	1.0
Mapping/GIS Analyst Supervisor	1.0	1.0	1.0	1.0
Admin Office Pro	16.0	16.0	16.0	17.0
Mapping/GIS Analyst	2.0	2.0	2.0	4.0
Mapping/GIS Tech	2.0	2.0	2.0	--
Sub-Division Total	22.0	22.0	22.0	23.0

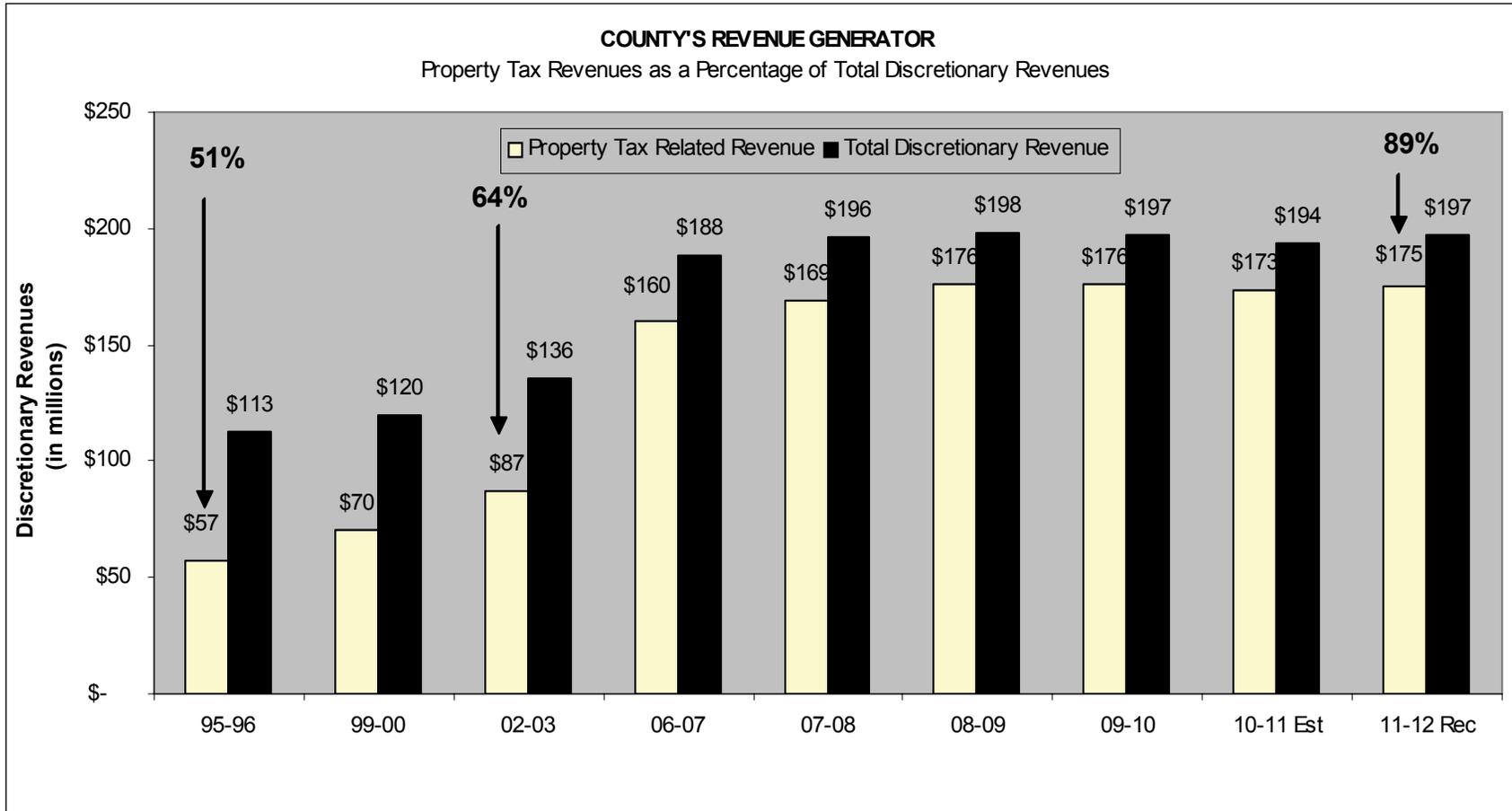
##### Real Property

Chief Appraiser	1.0	1.0	1.0	1.0
Division Manager	1.0	1.0	1.0	2.0
Assessment Supervisor	3.0	2.0	2.0	4.0
Admin Office Pro	--	1.0	1.0	--
Department Business Specialist	--	--	--	1.0
Department Business Specialist	--	1.0	1.0	--
Appraiser	11.0	14.0	14.0	18.3
Appraiser Aide	2.0	--	--	--
Sub-Division Total	18.0	20.0	20.0	26.3

##### Business/Minerals

Division Manager	1.0	1.0	1.0	1.0
Assessment Supervisor	4.0	4.0	4.0	4.0
Admin Office Pro	4.0	5.0	5.0	5.0
Appraiser	11.0	10.0	10.0	6.8
Auditor-Appraiser	6.0	5.0	5.0	5.0
Appraiser Aide	1.0	--	--	--
Sub-Division Total	27.0	25.0	25.0	21.8
Division Total	67.0	71.0	71.0	71.0

Property tax revenue generated by the Assessor's valuation work is estimated at roughly 89% of the County's discretionary revenue in Fiscal Year 2011-2012, compared to 51% in Fiscal Year 1995-96. The increase in property tax revenue as a percentage of discretionary revenue, demonstrates the importance of the Assessor function to the County, not only to county departments receiving discretionary revenue, but also to schools, cities, and special districts receiving property tax.



This page intentionally left blank.