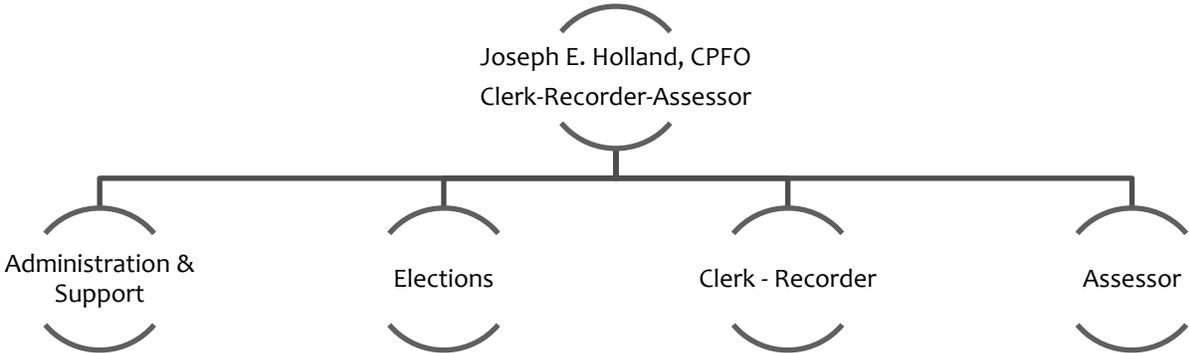


Clerk-Recorder-Assessor



BUDGET & FULL-TIME EQUIVALENTS SUMMARY & BUDGET PROGRAMS CHART

Operating	\$ 16,821,295
Capital	\$ 125,000
FTEs	98.1



Clerk-Recorder-Assessor

Department

MISSION STATEMENT

To honor the public's trust by assuring honest and open elections, recording, maintaining and preserving property and vital records, setting fair and impartial values for tax purposes, and providing courteous and professional service at a reasonable cost.

DEPARTMENT DESCRIPTION

The Clerk-Recorder-Assessor Department has three direct service budget programs: Assessor, Clerk-Recorder, and Elections.

Within the official duties as prescribed by the Revenue and Taxation Code, the Assessor Program is responsible for fairly, timely, and accurately assessing the value on all taxable property and creating the annual assessment roll which is the basis for the funding of public services.

In accordance with various sections of the California Government Code, the Clerk-Recorder Program records all official documents for the County, registers and issues copies of vital records (births, deaths, and marriages), and serves as the custodian for those records. In addition, the Clerk function of the Clerk-Recorder provides for filing of domestic partnerships, fictitious business names, notary bonds, and other miscellaneous filings and services.

In accordance with the official duties prescribed by the Election Code, the Elections Program primarily is responsible for registering voters, maintaining a current voter file, and ensuring that voters of the County have the tools they need, the equipment they trust, the information and access they deserve, and the right they value in order to participate in the election process.

The Administration and Support Program provides support functions to the Department's direct service programs by providing leadership and direction in support of the Department's overall mission and goals.

HIGHLIGHTS OF 2016-18 OBJECTIVES

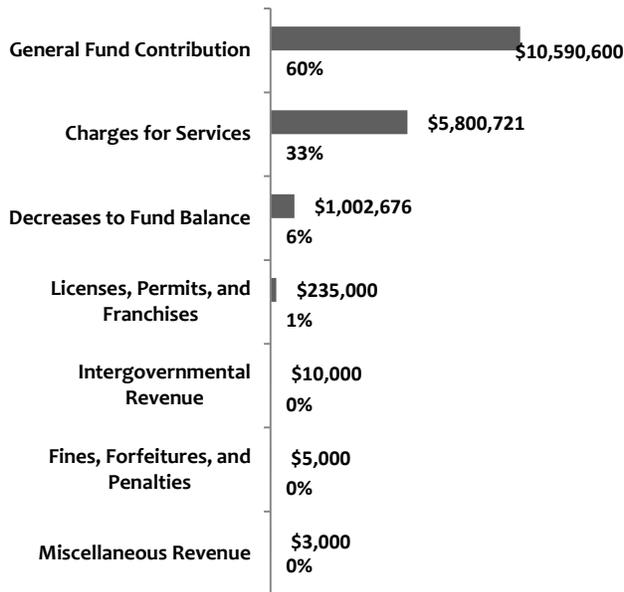
- The Assessor will complete 97% of all assessment work items by close of the annual tax roll, which becomes the base upon which local property taxes are levied, collected, and distributed to cities, the County, and special districts to fund government services.
- The Assessor will continue the process of analyzing the requirements to modernize the Assessor Property System.
- Elections will conduct the 2016 Presidential General Election, the 2018 Direct Primary Election, and any local elections as requested by local agencies.
- Elections, through voter outreach and support, will strive to materially maintain or increase the voter turnout rate related to the last comparable election.
- The Clerk-Recorder will record 75,000 official documents per Fiscal Year and index 100% of those documents the same day.
- The Clerk-Recorder plans to complete the mandated redaction of Social Security Numbers in all official records dating back to 1980.

Clerk-Recorder-Assessor

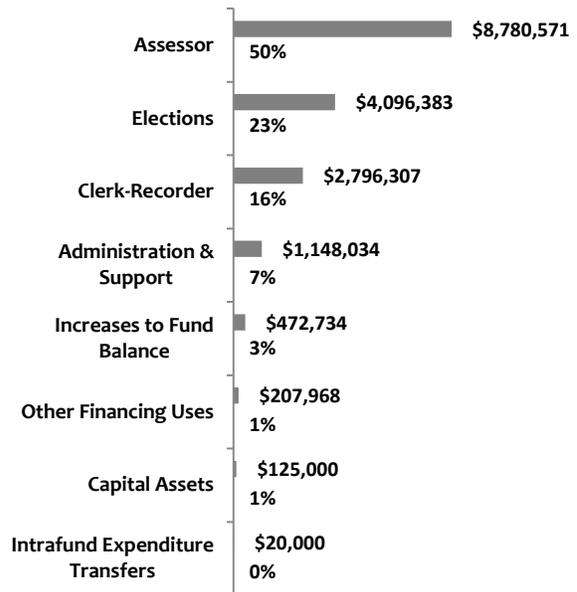
Department

RECOMMENDED SOURCES & USES OF FUNDS

Source of Funds - \$17,646,997

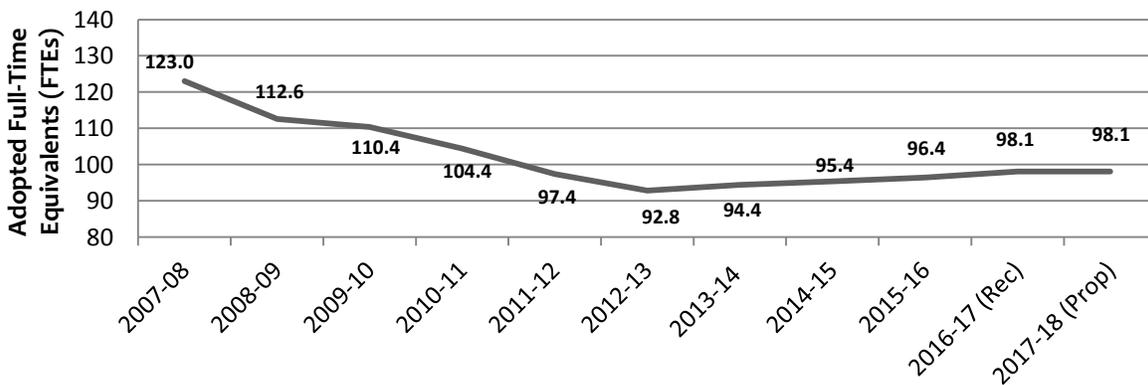


Use of Funds - \$17,646,997



STAFFING TREND

The staffing trend values will differ from prior year budget books in order to show amounts without the impact of any vacancy factors.



Clerk-Recorder-Assessor

Department

BUDGET OVERVIEW

Staffing Detail By Budget Program	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
Administration & Support	6.19	6.80	(1.00)	5.80	5.80
Elections	14.71	10.50	2.00	12.50	12.50
Clerk-Recorder	17.58	17.15	0.25	17.40	17.40
Assessor	58.61	61.92	0.50	62.42	62.42
Total	97.09	96.38	1.75	98.12	98.12
<hr/>					
Budget By Budget Program					
Administration & Support	\$ 1,128,583	\$ 1,305,452	\$ (157,418)	\$ 1,148,034	\$ 1,186,668
Elections	3,004,684	3,662,201	434,182	4,096,383	3,889,787
Clerk-Recorder	2,203,628	2,799,180	(2,873)	2,796,307	2,893,546
Assessor	7,781,158	8,775,568	5,003	8,780,571	9,195,320
Total	\$ 14,118,053	\$ 16,542,401	\$ 278,894	\$ 16,821,295	\$ 17,165,321
<hr/>					
Budget By Categories of Expenditures					
Salaries and Employee Benefits	\$ 11,146,214	\$ 12,667,482	\$ 118,279	\$ 12,785,761	\$ 13,300,712
Services and Supplies	2,298,290	3,080,482	234,940	3,315,422	3,116,555
Other Charges	673,549	794,437	(74,325)	720,112	748,054
Total Operating Expenditures	14,118,053	16,542,401	278,894	16,821,295	17,165,321
Capital Assets	207,719	153,000	(28,000)	125,000	2,910,000
Other Financing Uses	276,697	207,968	-	207,968	207,968
Intrafund Expenditure Transfers (+)	10,770	20,000	-	20,000	20,000
Increases to Fund Balances	240,452	157,889	314,845	472,734	36,571
Fund Balance Impact (+)	302,716	-	-	-	-
Total	\$ 15,156,407	\$ 17,081,258	\$ 565,739	\$ 17,646,997	\$ 20,339,860
<hr/>					
Budget By Categories of Revenues					
Licenses, Permits and Franchises	\$ 252,175	\$ 207,000	\$ 28,000	\$ 235,000	\$ 235,000
Fines, Forfeitures, and Penalties	7,160	5,000	-	5,000	5,000
Use of Money and Property	1	-	-	-	-
Intergovernmental Revenue	131,451	67,765	(57,765)	10,000	10,000
Charges for Services	4,898,309	4,726,398	1,074,323	5,800,721	4,827,052
Miscellaneous Revenue	7,733	3,000	-	3,000	3,000
Total Operating Revenues	5,296,830	5,009,163	1,044,558	6,053,721	5,080,052
Decreases to Fund Balances	128,678	1,579,095	(576,419)	1,002,676	2,092,407
General Fund Contribution	9,730,900	10,493,000	97,600	10,590,600	10,805,700
Fund Balance Impact (-)	-	-	-	-	2,361,701
Total	\$ 15,156,407	\$ 17,081,258	\$ 565,739	\$ 17,646,997	\$ 20,339,860

Clerk-Recorder-Assessor

Department

CHANGES & OPERATIONAL IMPACT: 2015-16 ADOPTED TO 2016-17 RECOMMENDED

Staffing

- Net increase of 1.75 FTEs resulting from the addition of one full time Administrative Office Professional (AOP) position in the Elections division and converting an existing part time AOP position in the Recorder division to full time.

The Department's budgeted staff has decreased by 25 FTE's since FY 2007-08. Over this period of time, workload in some programs decreased, reducing the level of staff needed. However, other staff reductions were necessary to absorb the impact of decreasing revenues, increasing costs, and County implemented budget reductions. This challenge has been compounded in recent years by the loss of experienced staff in the Assessor's office. The sub-optimal FY 2016-17 Recommended staffing level continues to impact service delivery of the Department, specifically in the Assessor and Elections Programs. Without optimal long-term staffing, the Assessor's ability to timely and accurately assess the value on all taxable property will continue to be impacted and the Assessor may continue to experience increases in assessment work backlog. Due to mandated changes in the Elections Program, additional staffing may be required to support mandated voter registration activities required by VoteCal, a statewide voter registration database, as well as potential impacts of the forthcoming conditional voter registration requirements.

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

Expenditures

- Net operating expenditure increase of \$279,000:
 - +\$235,000 net increase in Services and Supplies primarily in the Elections division due to:
 - +\$42,000 increased costs associated with a Presidential General Election in FY 2016-17.
 - +\$150,000 in one-time expenses in the Elections Division funded with one-time sources of funding.
 - +\$118,000 net increase in Salaries and Employee Benefits costs to fund 98.1 FTEs.
 - -\$74,000 net decrease in Other Charges primarily related to a decrease in Information Technology Department data service and Electricity charges.
- Net non-operating expenditure increase of \$287,000 primarily due to:
 - +\$315,000 operating revenue surplus designated for future use by the Department, created by an increase in Election cost reimbursements from the Presidential General Election.

These changes result in Recommended operating expenditures of \$16,821,000, non-operating expenditures of \$826,000, and total expenditures of \$17,647,000. Non-operating expenditures primarily include capital assets, transfers, and increases to fund balance components.

Clerk-Recorder-Assessor

Department

CHANGES & OPERATIONAL IMPACT: 2015-16 ADOPTED TO 2016-17 RECOMMENDED (CONT'D)

Revenues

- Net operating revenue increase of \$1,045,000:
 - +\$1,074,000 increase in Charges for Services, primarily due to:
 - +\$770,000 increase in recoverable election costs from local agencies due to FY 2016-17 being a Presidential General Election with budgeted local agency consolidation.
 - +\$157,000 increase in property tax and supplemental administration fees (Assessor's Program).
 - +\$148,000 increase in Clerk-Recorder charges for services from anticipated increase in document recordings and vital certificate requests.
 - +\$28,000 increase in Licenses, Permits and Franchises for annual fluctuations in the number of estimated marriage licenses issued.
 - -\$58,000 decrease in Election grant funds due to grant expiration.
- Net non-operating revenue decrease of \$479,000 primarily due to:
 - -\$576,000 net decrease in use of fund balances.
 - -\$467,000 decrease in budgeted use of committed fund balances to balance the Department's budget. Increased recoverable election costs in FY 2016-17 will replace the use of fund balance.
 - -\$185,000 decrease in use of the Clerk-Recorder restricted fund balances needed to fund Clerk-Recorder program costs estimated to be lower in FY 2016-17.
 - -\$75,000 decrease in use of Departmental fund balance to fund New Assessor Property System project costs estimated to be lower in FY 2016-17.
 - +\$150,000 increase in use of Elections fund balance to fund one-time office equipment acquisitions in the Elections division.
 - +\$98,000 increase in General Fund Contribution for Salary and Benefit increases.

These changes result in Recommended operating revenue of \$6,054,000, non-operating revenues of \$11,593,000, and total sources of \$17,647,000. Non-operating revenues primarily include General Fund Contribution and decreases to fund balance components.

Clerk-Recorder-Assessor

Department

CHANGES & OPERATIONAL IMPACT: 2016-17 RECOMMENDED TO 2017-18 PROPOSED

Expenditures

The FY 2017-18 Proposed Budget includes no changes in staffing from the FY 2016-17 Recommended Budget; however, there will be a \$515,000 increase in the cost of Salary and Employee Benefits for funding the same level of staff. Services and Supplies are estimated to decrease by \$229,000 the majority of which is due to a reduction of one-time expenditures in the Elections Division. It is anticipated that voting system and conditional voter registration equipment in the Elections Division will be replaced in FY 2017-18, which represents a one-time budgeted cost increase of \$2,785,000.

Revenues

Departmental net operating revenue is expected to decrease by \$974,000 in FY 2017-18. In the Elections Program, a decrease of \$770,000 is anticipated and related to the FY 2017-18 Direct Primary Election, where no recoverable costs are received due to no local agency consolidation in this type of election. In the Assessor Program, property tax administration fees are expected to decrease by \$204,000 due to an anticipated decrease in recoverable property tax administration costs.

2017-18 Budget Gap

To maintain FY 2016-17 service levels, \$20,340,000 of funding will be required in FY 2017-18. Of this amount, \$17,978,000 will be funded by departmental revenues, funding sources and General Fund contribution, leaving a \$2,362,000 structural imbalance. The imbalance consists of an Operational budget gap of \$343,000 primarily due to increases in employee salary and benefits and decreases in departmental revenues. The remaining \$2,019,000 is the unfunded component of the cost of the voting system and conditional voter registration equipment in the Elections Division. While there is a potential for grant funds to cover this one-time expenditure, a General Fund contribution may be required should the grant funds not be available.

RELATED LINKS

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

Clerk-Recorder-Assessor

Department

PERFORMANCE MEASURES

Description	FY 2013-14 Actual	FY 2014-15 Actual	FY 2015-16 Estimated Actual	FY 2016-17 Recommend	FY 2017-18 Proposed
Administration and Support					
Percent of departmental Employee Performance Reviews (EPRs) completed by the due date.	Not Used in Prior Years	Not Used in Prior Years	82%	100%	100%
Elections					
Number of voter registration transactions (adds, deletes, and changes) processed for the Fiscal Year.	93,773	101,697	98,000	150,000	95,000
Number of Federal, State, and Local Elections conducted in the Fiscal Year.	2	3	2	2	1
Percentage and number of Permanent Vote By Mail Voters.	57% 110,990	58% 113,449	60% 116,000	57% 118,000	60% 118,000
Percentage of and number of registered voters that voted in the statewide election for the Fiscal Year.	38% 73,136	57% 114,106	50% 98,000	80% 163,200	38% 73,000
Clerk Recorder					
Percentage and number of official documents recorded and indexed the same day.	100% 78,793	100% 78,339	100% 77,500	100% 75,000	100% 75,000
Percentage and number of documents recorded electronically (E-Recorded).	29% 22,494	30% 23,399	30% 23,000	30% 23,000	30% 23,000
Number of marriage licenses issued.	3,942	3,777	3,800	3,800	3,800
Assessor					
Percentage of required property tax assessments completed by July 1 st each year to provide basis for tax distribution to all property tax receiving entities.	96%	98%	97%	97%	97%
Retention rate and retained value of property under appeal.	83% \$2.2 Billion	88% \$1.9 Billion	95% \$1.0 Billion	94% Unknown	90% Unknown

Clerk-Recorder-Assessor



Clerk-Recorder-Assessor

Program

ADMINISTRATION & SUPPORT

The Administration and Support Program serves as support functions to the Department's direct service programs by providing leadership and direction in support of the Department's overall mission and goals.

Staffing

Staffing Detail By Budget Program	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
COUNTY CLK-REC-ASSESSOR	1.00	1.00	-	1.00	1.00
CHIEF DEPUTY CLERK-RECORDER	0.06	-	-	-	-
PROGRAM MANAGER	0.35	0.20	-	0.20	0.20
EDP OFFICE AUTO SPEC	0.85	1.00	-	1.00	1.00
HR MANAGER	1.00	1.00	-	1.00	1.00
EDP SYS & PROG ANLST SR	0.02	-	-	-	-
ADMN OFFICE PRO	0.01	-	-	-	-
FISCAL MANAGER	0.32	1.00	-	1.00	1.00
COMPUTER SYSTEMS SPEC	0.82	1.00	-	1.00	1.00
DEPT BUS SPEC	0.55	1.00	(1.00)	-	-
APPRAISER	0.29	-	-	-	-
FINANCIAL OFFICE PRO SR	0.59	0.60	-	0.60	0.60
ADMINISTRATIVE LDR-GEN	0.21	-	-	-	-
FINANCIAL OFFICE PRO III-RES	0.11	-	-	-	-
Total	6.19	6.80	(1.00)	5.80	5.80

Revenue & Expenditures

Budget By Categories of Expenditures	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
Salaries and Employee Benefits	\$ 1,006,271	\$ 1,124,476	\$ (137,131)	\$ 987,345	\$ 1,025,144
Services and Supplies	87,123	147,700	(23,500)	124,200	124,200
Other Charges	35,189	33,276	3,213	36,489	37,324
Total Operating Expenditures	1,128,583	1,305,452	(157,418)	1,148,034	1,186,668
Capital Assets	39,611	50,000	-	50,000	50,000
Total Expenditures	\$ 1,168,194	\$ 1,355,452	\$ (157,418)	\$ 1,198,034	\$ 1,236,668
Budget By Categories of Revenues					
Miscellaneous Revenue	3,800	-	-	-	-
Total Operating Revenues	3,800	-	-	-	-
Decreases to Fund Balances	-	-	229,044	229,044	229,044
General Fund Contribution	1,291,820	1,355,452	(386,462)	968,990	1,007,624
Total Revenues	\$ 1,295,620	\$ 1,355,452	\$ (157,418)	\$ 1,198,034	\$ 1,236,668

Clerk-Recorder-Assessor

Program

ADMINISTRATION & SUPPORT (CONT'D)

2015-16 Anticipated Accomplishments

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

2016-18 Objectives

- Prepare, monitor, and execute a FY 2016-17 Budget in support of the Department's FY 2016-17 goals and objectives.
- Provide administrative support in the timely recruitment of new staff as attrition occurs to minimize impact on service levels and ensure business continuity.

Clerk-Recorder-Assessor

Program

ELECTIONS

The Elections Program primarily is responsible for registering voters, maintaining a current voter file, and ensuring that voters of the County have the tools they need, the equipment they trust, the information and access they deserve, and the right they value in order to participate in the election process.

Staffing

Staffing Detail By Budget Program	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
CHIEF DEPUTY REGISTRAR OF VOTERS	1.00	1.00	-	1.00	1.00
CHIEF DEPUTY ASSESSOR	0.01	-	-	-	-
PROGRAM MANAGER	1.01	1.00	-	1.00	1.00
EDP OFFICE AUTO SPEC	0.07	-	-	-	-
EDP SYS & PROG ANLST	0.50	0.25	0.25	0.50	0.50
ASSESSMENT SUPERVISOR	0.02	-	-	-	-
ADMN OFFICE PRO	2.79	1.75	0.25	2.00	2.00
COMPUTER SYSTEMS SPEC	0.02	-	-	-	-
DEPT BUS SPEC	1.39	2.00	-	2.00	2.00
MAPPING/GIS ANALYST	0.19	-	-	-	-
APPRAISER	0.04	-	-	-	-
ADMN OFFICE PRO SR	3.88	4.50	1.50	6.00	6.00
FINANCIAL OFFICE PRO SR	0.01	-	-	-	-
EXTRA HELP	3.77	-	-	-	-
Total	<u>14.71</u>	<u>10.50</u>	<u>2.00</u>	<u>12.50</u>	<u>12.50</u>

Revenue & Expenditures

Budget By Categories of Expenditures	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
Salaries and Employee Benefits	\$ 1,462,877	\$ 1,615,719	\$ 259,083	\$ 1,874,802	\$ 1,887,754
Services and Supplies	1,385,720	1,838,442	191,510	2,029,952	1,801,085
Other Charges	156,086	208,040	(16,411)	191,629	200,948
Total Operating Expenditures	<u>3,004,684</u>	<u>3,662,201</u>	<u>434,182</u>	<u>4,096,383</u>	<u>3,889,787</u>
Capital Assets	76,425	30,000	-	30,000	2,815,000
Other Financing Uses	207,966	207,968	-	207,968	207,968
Intrafund Expenditure Transfers (+)	10,770	20,000	-	20,000	20,000
Total Expenditures	<u>\$ 3,299,845</u>	<u>\$ 3,920,169</u>	<u>\$ 434,182</u>	<u>\$ 4,354,351</u>	<u>\$ 6,932,755</u>
Budget By Categories of Revenues					
Intergovernmental Revenue	131,451	67,765	(57,765)	10,000	10,000
Charges for Services	394,095	25,000	770,000	795,000	25,000
Total Operating Revenues	<u>525,546</u>	<u>92,765</u>	<u>712,235</u>	<u>805,000</u>	<u>35,000</u>
Decreases to Fund Balances	-	-	150,136	150,136	765,612
General Fund Contribution	3,155,091	3,827,404	(428,189)	3,399,215	4,112,755
Total Revenues	<u>\$ 3,680,637</u>	<u>\$ 3,920,169</u>	<u>\$ 434,182</u>	<u>\$ 4,354,351</u>	<u>\$ 4,913,367</u>

Clerk-Recorder-Assessor

Program

ELECTIONS (CONT'D)

2015-16 Anticipated Accomplishments

- Conduct the Presidential Primary Election to be held on June 7, 2016.
- Elections went live on VoteCal, a statewide voter registration database, in August of 2015. Due to our staff's diligent work to prepare our data, this transition occurred two months earlier than anticipated and moved our County into the "pilot" phase from phase 1 of 6 scheduled deployment waves. We also participated in a Mock Election in the Spring of 2016 to test VoteCal functionality.
- Redacted campaign finance disclosure forms online, allowing the public to search for campaign finance reports required by the Fair Political Practices Commission, and providing enhanced transparency and increased service to our customers.
- Continued to research new vote tabulation systems with a goal to acquire and implement a new system by FY 2017-18.

2016-18 Objectives

- Conduct the 2016 Presidential General Election, the 2018 Direct Primary Election, and any local elections as requested by local agencies.
- Through voter outreach and support, strive to materially maintain or increase the voter turnout rate related to the last comparable election.
- Establish efficient processes and procedures for the implementation of Conditional Voter Registration, which will allow voters to register to vote and vote on the same day, up to and including Election Day. Conditional Voter Registration is effective January of the year following the certification of VoteCal, the State of California's statewide voter registration database. Anticipated effective date is January 2017.
- Update our website to make it more accessible to all viewers.
- Adopt a revised Single Comprehensive Code, which will align with the reporting categories required by the Political Reform Act.
- Continue to research new vote tabulation systems with a goal to acquire and implement a new system by FY 2017-18.

Clerk-Recorder-Assessor

Program

CLERK-RECORDER

The Clerk-Recorder Program records all official documents for the County, registers and issues copies of vital records (births, deaths, and marriages), and serves as the custodian for those records. In addition, the Clerk function of the Clerk-Recorder provides for filing of domestic partnerships, fictitious business names, notary bonds, and other miscellaneous filings and services.

Staffing

Staffing Detail By Budget Program	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
CHIEF DEPUTY CLERK-RECORDER	0.94	1.00	-	1.00	1.00
DIVISION CHIEF	-	-	1.00	1.00	1.00
PROGRAM MANAGER	0.78	1.00	(1.00)	-	-
DIVISION MANAGER	1.00	1.00	(1.00)	-	-
EDP OFFICE AUTO SPEC	0.07	-	-	-	-
EDP SYS & PROG ANLST	0.50	0.75	(0.25)	0.50	0.50
ADMN OFFICE PRO	8.11	9.50	-	9.50	9.50
FISCAL MANAGER	0.02	-	-	-	-
DEPT BUS SPEC	0.01	-	-	-	-
APPRAISER	0.01	-	-	-	-
ADMN OFFICE PRO SR	3.40	3.50	1.50	5.00	5.00
FINANCIAL OFFICE PRO SR	0.27	0.40	-	0.40	0.40
ADMINISTRATIVE LDR-GEN	0.01	-	-	-	-
FINANCIAL OFFICE PRO III-RES	0.05	-	-	-	-
EXTRA HELP	2.44	-	-	-	-
Total	17.58	17.15	0.25	17.40	17.40

Revenue & Expenditures

Budget By Categories of Expenditures	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
Salaries and Employee Benefits	\$ 1,704,074	\$ 2,089,277	\$ (3,317)	\$ 2,085,960	\$ 2,178,399
Services and Supplies	371,585	562,320	6,530	568,850	568,850
Other Charges	127,969	147,583	(6,086)	141,497	146,297
Total Operating Expenditures	2,203,628	2,799,180	(2,873)	2,796,307	2,893,546
Capital Assets	52,741	53,000	(28,000)	25,000	25,000
Other Financing Uses	68,731	-	-	-	-
Increases to Fund Balances	240,452	157,889	(43,704)	114,185	36,571
Total Expenditures	\$ 2,565,552	\$ 3,010,069	\$ (74,577)	\$ 2,935,492	\$ 2,955,117
Budget By Categories of Revenues					
Licenses, Permits and Franchises	252,175	207,000	28,000	235,000	235,000
Fines, Forfeitures, and Penalties	7,160	5,000	-	5,000	5,000
Charges for Services	2,504,802	2,205,190	147,710	2,352,900	2,352,900
Miscellaneous Revenue	3,931	3,000	-	3,000	3,000
Total Operating Revenues	2,768,068	2,420,190	175,710	2,595,900	2,595,900
Decreases to Fund Balances	35,531	753,339	(413,747)	339,592	359,217
Total Revenues	\$ 2,803,598	\$ 3,173,529	\$ (238,037)	\$ 2,935,492	\$ 2,955,117

Clerk-Recorder-Assessor

Program

CLERK-RECORDER (CONT'D)

2015-16 Anticipated Accomplishments

- Record approximately 77,500 official documents in the current Fiscal Year and index 100% of the records in the same day.
- Began to index additional trustor names on Substitution of Trustee documents which provides better customer service and more transparency for the records.
- Replaced the hardware environment comprised of many servers and improved the ability to restore operations in the event of a major disaster.
- Purchased a new microfilm digital scanner and is performing various automation projects to digitize the vital and official records.
- Began the process of replacing master microfilm for the official records for the period of recording from 1959-1974. The project will result in film that will last 200 years, data entry for this historic index and creation of a database to search and access the records digitally. This is a multi-year project that will be completed in phases and the work with the vendor has begun in creating the digital images and enhancing the quality of the images.

2016-18 Objectives

- Complete the mandated redaction of Social Security Numbers in all official records dating back to 1980.
- Pursue updating the Documentary Tax Ordinance to clarify and include recent updates from the legislature regarding the tax.
- Pursue standardizing Indexing practices with other counties, create a new training manual, and provide training for the staff.
- Continue automating the historic birth certificates which currently reside on microfilm and paper books, which will decrease the wait time for customers requesting birth records from the 1960's.

Clerk-Recorder-Assessor

Program

ASSESSOR

The Assessor Program is responsible for fairly, timely, and accurately assessing the value on all taxable property and creating the annual assessment roll which is the basis for the funding of public services.

Staffing

Staffing Detail By Budget Program	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
CHIEF DEPUTY ASSESSOR	0.99	1.00	-	1.00	1.00
PROGRAM MANAGER	3.64	3.80	-	3.80	3.80
PROJECT MANAGER	0.50	1.00	-	1.00	1.00
FINANCIAL SYS ANALYST SR	1.00	2.00	-	2.00	2.00
EDP OFFICE AUTO SPEC	0.01	-	-	-	-
EDP SYS & PROG ANLST SR	2.82	3.00	-	3.00	3.00
EDP SYS & PROG ANLST	0.88	1.00	-	1.00	1.00
MAPPING/GIS ANALYST SUPV	1.00	1.00	-	1.00	1.00
ASSESSMENT SUPERVISOR	5.48	6.00	-	6.00	6.00
ADMN OFFICE PRO	9.84	11.12	(0.50)	10.62	10.62
MAPPING/GIS ANALYST	2.81	3.00	-	3.00	3.00
AUDITOR-APPRAISER	5.00	5.00	(1.00)	4.00	4.00
APPRAISER	17.89	18.00	1.00	19.00	19.00
FINANCIAL OFFICE PRO SR	0.63	1.00	(1.00)	-	-
ADMN OFFICE PRO SR	4.49	5.00	1.00	6.00	6.00
FINANCIAL OFFICE PRO	0.15	-	-	-	-
ADMINISTRATIVE LDR-GEN	0.20	-	-	-	-
ACCOUNTANT-AUDITOR	-	-	1.00	1.00	1.00
EXTRA HELP	1.28	-	-	-	-
Total	58.61	61.92	0.50	62.42	62.42

Revenue & Expenditures

Budget By Categories of Expenditures	2014-15 Actual	2015-16 Adopted	Change from FY15-16 Ado to FY16-17 Rec	2016-17 Recommended	2017-18 Proposed
Salaries and Employee Benefits	\$ 6,972,992	\$ 7,838,010	\$ (356)	\$ 7,837,654	\$ 8,209,415
Services and Supplies	453,862	532,020	60,400	592,420	622,420
Other Charges	354,305	405,538	(55,041)	350,497	363,485
Total Operating Expenditures	7,781,158	8,775,568	5,003	8,780,571	9,195,320
Capital Assets	38,942	20,000	-	20,000	20,000
Increases to Fund Balances	-	-	358,549	358,549	-
Total Expenditures	\$ 7,820,100	\$ 8,795,568	\$ 363,552	\$ 9,159,120	\$ 9,215,320
Budget By Categories of Revenues					
Use of Money and Property	1	-	-	-	-
Charges for Services	1,999,412	2,496,208	156,613	2,652,821	2,449,152
Miscellaneous Revenue	3	-	-	-	-
Total Operating Revenues	1,999,416	2,496,208	156,613	2,652,821	2,449,152
Decreases to Fund Balances	93,147	825,756	(541,852)	283,904	738,534
General Fund Contribution	5,283,989	5,310,144	912,251	6,222,395	5,685,321
Total Revenues	\$ 7,376,552	\$ 8,632,108	\$ 527,012	\$ 9,159,120	\$ 8,873,007

Clerk-Recorder-Assessor

Program

ASSESSOR (CONT'D)

2015-16 Anticipated Accomplishments

- Completed 97% of all secured and unsecured assessment work items by close of the annual tax roll (July 1) to create the assessment roll, which becomes the base upon which local property taxes are levied, collected and distributed to the cities, County and special districts to fund government services.
- Performed timely resolution of assessment appeals within the statutory timeframe while adequately defending the disputed roll value at risk.
- Completed review of all parcels subject to Section 51 of the Revenue and Taxation Code, which require property values to be enrolled at the lesser of factored base value or market value as of the January 1st tax lien date, by June 30th as part of the assessment roll.
- Continued analyzing the system requirements for updating and modernizing the Assessor Property System.

2016-18 Objectives

- Complete 97% of all assessment work items by close of the annual tax roll, which becomes the base upon which local property taxes are levied, collected, and distributed to cities, the County and special districts to fund government services.
- Perform timely resolution of assessment appeals within the statutory timeframe while adequately defending the disputed roll value at risk.
- Complete review of all parcels subject to Section 51 of the Revenue and Taxation Code, which require property values to be enrolled at the lesser of factored base value or market value as of the January 1st tax lien date, by June 30th as part of the assessment roll.
- Continue the process of analyzing the requirements to modernize the Assessor Property System.

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