

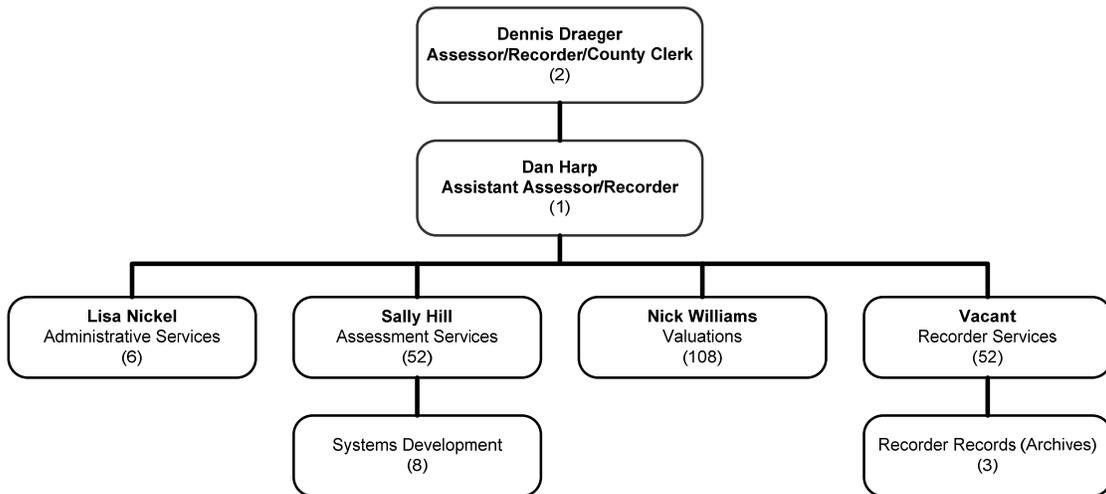
ASSESSOR/RECORDER/COUNTY CLERK Dennis Draeger

DEPARTMENT MISSION STATEMENT

The Office of the Assessor/Recorder/County Clerk performs mandated assessment, recording and County Clerk functions for public benefit in a manner that is fair, informative, and with uniform treatment. It is necessary as a means of revenue generation in order to fund essential public services and efficiently operate County and state government.



ORGANIZATIONAL CHART



2012-13 ACCOMPLISHMENTS

- Completed an equipment refresh project, replacing several obsolete servers, desktops, laptops, monitors and printers, providing for a more stable information technology environment.
- Imported over 200,000 imaged historical documents into the Assessor Property Information Management System (PIMS), providing improved access for all staff for parcel research purposes.
- Relocated the Hesperia district office to the first floor of the Jerry Lewis High Desert Government Center, providing better access for taxpayers.
- Updated the Department’s fee schedule to accurately reflect costs for non-mandated services.
- Implemented several enhancements to business property processing in partnership with Information Services Department (ISD), including worksheets for audited and appealed costs, leased equipment processing and displaying of imaged records in PIMS.
- Implemented a benchmarking feature to the Assessor’s automated system. This allows appraisers to group similar models in housing tracts for appraisal purposes. This will improve the annual review process required for parcels previously reduced in value under Proposition 8 Decline in Value.
- Implemented automated system changes to allow for multiple vendor processing of redaction, indexing and image services.
- Redesigned the Recorder/County Clerk - Archives internet site, providing more helpful information to customers. Improvements include fillable forms and online research of some records stored at the County Archives.
- Implemented system changes needed to allow agencies to submit documents for recording via the California e-Recording Transaction Network Authority (CeRTNA) system. CeRTNA allows agencies to use this single portal to record documents to multiple participating counties.
- Reconfigured existing workstations in the County Clerk section to accommodate ergonomic needs.

FISCAL



COUNTY GOALS AND OBJECTIVES AND DEPARTMENT PERFORMANCE MEASURES

COUNTY GOAL: OPERATE IN A FISCALLY-RESPONSIBLE AND BUSINESS-LIKE MANNER

Objective(s): • *Invest County resources in ways which create more ongoing revenue to reinvest in maintaining services.*

Department Strategy:

- *Establish a value for appraisable events by the close of the roll year to optimize tax revenues.*
- *Process annual 571L Business Property Statements by the close of the roll year to optimize tax revenues.*

Measurement	2011-12 Actual	2012-13 Target	2012-13 Estimate	2013-14 Target
Percentage completed of appraisable events received to date in current roll year.	99%	99%	99%	99%
Percentage completed of Business Property Statements filed by the annual deadline.	99.3%	99%	99%	99%

COUNTY GOAL: IMPROVE COUNTY GOVERNMENT OPERATIONS

Objective(s): • *Monitor and evaluate operations and implement strategies to continually improve efficiency and effectiveness.*

Department Strategy:

- *Process changes of ownership to ensure values are enrolled by the close of the roll year.*

Measurement	2011-12 Actual	2012-13 Target	2012-13 Estimate	2013-14 Target
Percentage completed of change of ownership documents received to date in current roll year.	95.5%	95.5%	95.5%	95.5%

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SUMMARY OF BUDGET UNITS

2013-14						
	Requirements	Sources	Net County Cost	Fund Balance	Net Budget	Staffing
General Fund						
Assessor/Recorder/County Clerk	22,789,523	7,106,500	15,683,023			221
Total General Fund	22,789,523	7,106,500	15,683,023			221
Special Revenue Funds						
Recorder Special Revenue Funds - Consolidated	12,611,172	4,490,092		8,121,080		11
Total Special Revenue Funds	12,611,172	4,490,092		8,121,080		11
Total - All Funds	35,400,695	11,596,592	15,683,023	8,121,080		232

5-YEAR REQUIREMENTS TREND

	2009-10	2010-11	2011-12	2012-13	2013-14
Assessor/Recorder/County Clerk	16,410,047	17,909,126	20,855,827	21,923,606	22,789,523
Systems Development	12,515,096	10,290,230	8,700,017	4,198,649	6,210,440
Vital Records	765,625	863,395	914,821	855,916	966,139
Electronic Recording	623,348	933,322	1,079,392	1,140,596	1,475,716
Recorder Records	1,306,567	1,488,363	1,545,280	1,286,217	1,411,300
Social Security Number Truncation	1,164,482	1,564,602	2,031,420	2,443,968	2,547,577
Total	32,785,165	33,049,038	35,126,757	31,848,952	35,400,695

5-YEAR SOURCES TREND

	2009-10	2010-11	2011-12	2012-13	2013-14
Assessor/Recorder/County Clerk	895,818	3,470,815	6,177,368	6,716,500	7,106,500
Systems Development	2,090,730	2,337,984	2,399,000	2,196,041	2,825,000
Vital Records	142,788	131,813	132,000	125,684	130,000
Electronic Recording	459,464	446,468	448,430	422,034	502,952
Recorder Records	467,341	451,670	445,454	418,907	504,160
Social Security Number Truncation	492,707	490,121	479,052	451,983	527,980
Total	4,548,848	7,328,871	10,081,304	10,331,149	11,596,592

5-YEAR NET COUNTY COST TREND

	2009-10	2010-11	2011-12	2012-13	2013-14
Assessor/Recorder/County Clerk	15,514,229	14,438,311	14,678,459	15,207,106	15,683,023
Total	15,514,229	14,438,311	14,678,459	15,207,106	15,683,023

5-YEAR FUND BALANCE TREND

	2009-10	2010-11	2011-12	2012-13	2013-14
Systems Development	10,424,366	7,952,246	6,301,017	2,002,608	3,385,440
Vital Records	622,837	731,582	782,821	730,232	836,139
Electronic Recording	163,884	486,854	630,962	718,292	972,764
Recorder Records	839,226	1,036,693	1,099,826	867,310	907,140
Social Security Number Truncation	671,775	1,074,481	1,552,368	1,991,985	2,019,597
Total	12,722,088	11,281,856	10,366,994	6,310,427	8,121,080



Assessor/Recorder/County Clerk

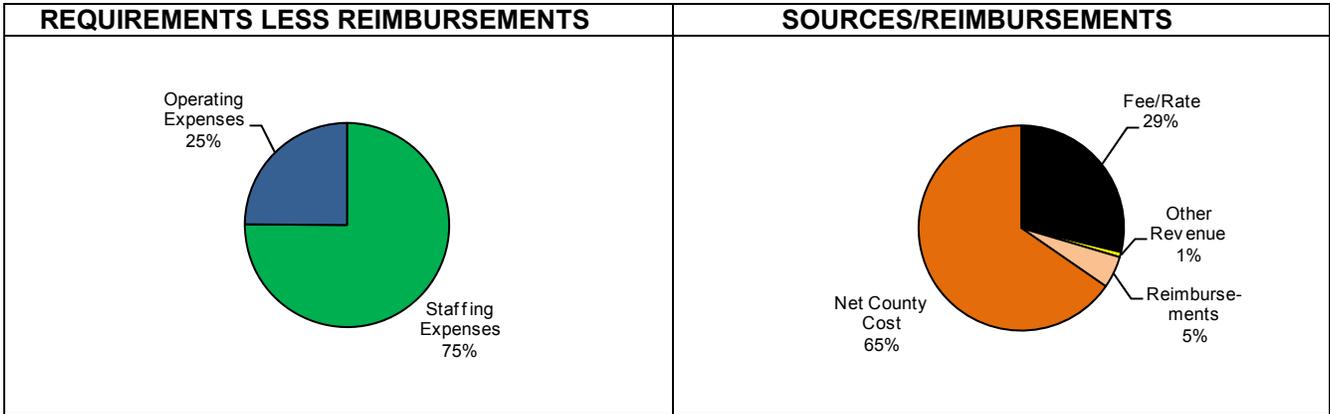
DESCRIPTION OF MAJOR SERVICES

Under California law, the Assessor/Recorder/County Clerk establishes a value for all locally taxable property including residential, commercial, business and personal property. The Assessor/Recorder/County Clerk’s Office maintains current records on approximately 753,322 parcels of real property, 31,544 business property accounts and 33,226 other assessments including boats, aircraft, and manufactured homes. The Assessor’s Office also administers property tax exemptions including homeowners, veteran, disabled veteran, church, religious, and welfare exemptions, as well as exclusions including parent-to-child and senior/disabled persons transfer of base year value.

Budget at a Glance	
Total Requirements	\$22,789,523
Total Sources	\$7,106,500
Net County Cost	\$15,683,023
Total Staff	221
Funded by Net County Cost	65%

The Valuations Division is responsible for real, personal, business and special property valuations and assessment appeals. District offices provide public assistance regarding questions of ownership, mailing addresses, parcel numbers and assessed values. The Assessment Services Division provides mapping, change of ownership, change of address, data entry services, public information services, and computer systems maintenance and development. The Administrative Services Division provides fiscal, payroll, mail services, and facility support. The Recorder Services Division accepts all documents for recording that comply with applicable recording laws. Official records are maintained evidencing ownership and encumbrances of real and personal property and other miscellaneous records. The Recorder Services Division is also responsible for County Archives and County Clerk functions. County Archives maintains historical records for the County. County Clerk maintains records as they relate to vital statistics, fictitious business names, and other records that are required by the State to be filed with the County Clerk.

2013-14 RECOMMENDED BUDGET



FISCAL



BUDGETED STAFFING

STAFFING ANALYSIS					5-YEAR STAFFING TREND				
	2011-12	2012-13	2012-13	2013-14					
Authorized Positions	Final	Adopted	Modified	Recommended					
Regular	216	216	216	221					
Limited Term	0	0	0	0					
Total	216	216	216	221					
Staffing Expenses	\$16,067,105	\$17,642,653	\$17,457,653	\$18,017,420					

Year	Staffing
2009-10	178
2010-11	238
2011-12	216
2012-13	216
2013-14	221

ANALYSIS OF 2013-14 RECOMMENDED BUDGET

GROUP: Fiscal
 DEPARTMENT: Assessor/Recorder/County Clerk
 FUND: General

BUDGET UNIT: AAA ASR
 FUNCTION: General
 ACTIVITY: Finance

	2009-10	2010-11	2011-12	2012-13	2012-13	2013-14	Change From
	Actual	Actual	Actual	Estimate	Modified Budget	Recommended Budget	2012-13 Modified Budget
Requirements							
Staffing Expenses	13,433,612	14,672,925	16,065,032	16,463,992	17,457,653	18,017,420	559,767
Operating Expenses	2,974,435	3,207,612	6,258,025	5,547,810	5,473,720	5,968,722	495,002
Capital Expenditures	0	67,807	42,493	61,000	0	0	0
Contingencies	0	0	0	0	0	0	0
Total Exp Authority	16,408,047	17,948,344	22,365,550	22,072,802	22,931,373	23,986,142	1,054,769
Reimbursements	0	(39,553)	(1,574,366)	(316,387)	(1,040,767)	(1,203,619)	(162,852)
Total Appropriation	16,408,047	17,908,791	20,791,184	21,756,415	21,890,606	22,782,523	891,917
Operating Transfers Out	0	0	45,000	41,000	33,000	7,000	(26,000)
Total Requirements	16,408,047	17,908,791	20,836,184	21,797,415	21,923,606	22,789,523	865,917
Sources							
Taxes	53,006	24,875	17,667	9,844	16,500	10,000	(6,500)
Realignment	0	0	0	0	0	0	0
State, Fed or Gov't Aid	0	0	0	0	0	0	0
Fee/Rate	514,358	3,220,307	5,946,068	6,598,418	6,463,000	6,902,000	439,000
Other Revenue	328,454	225,669	214,607	238,099	237,000	194,500	(42,500)
Total Revenue	895,818	3,470,851	6,178,342	6,846,361	6,716,500	7,106,500	390,000
Operating Transfers In	0	0	0	0	0	0	0
Total Sources	895,818	3,470,851	6,178,342	6,846,361	6,716,500	7,106,500	390,000
Net County Cost	15,512,229	14,437,940	14,657,842	14,951,054	15,207,106	15,683,023	475,917
Budgeted Staffing					216	221	5

MAJOR EXPENDITURES AND REVENUE IN 2013-14 RECOMMENDED BUDGET

Staffing expenses of \$18.0 million represent the majority of this budget unit and fund 221 budgeted regular positions. Operating expenses consist primarily of printing and taxpayer notice mailing costs, COWCAP, and systems development charges for the Property Information Management System (PIMS). Reimbursements of \$1.2 million are primarily from the Recorder special revenue funds for administrative costs. Sources of \$7.1 million include fees for recording and County Clerk services, special assessments, transfers of ownership, and data sales.



BUDGET CHANGES AND OPERATIONAL IMPACT

Staffing expenses are increasing by \$559,767 primarily as a result of the addition of new positions and increases in retirement and other benefit costs. Operating expenses are increasing by \$495,002 primarily due to Application Development Maintenance and Support costs now being budgeted directly in the Department and new annual maintenance of a proprietary software system, partially offset by a decrease in computer hardware expenses due to the completion of the equipment refresh project. Reimbursements are increasing by \$162,852 primarily due to increased administrative costs reimbursed from Recorder special revenue funds. Sources are increasing by \$390,000 as a result of anticipated increases in the volume of recorded documents.

STAFFING CHANGES AND OPERATIONAL IMPACT

Staffing expenses of \$18.0 million fund 221 budgeted regular positions. The 2013-14 recommended budget includes a net increase of 5 positions. Staffing changes are as follows:

- Assessment Appeals: Reclassification of 5 Appraiser IIIs and 1 Auditor-Appraiser III to Appraiser IVs to recognize the complex and specialized nature of appeals work, and the addition of 2 Appraiser IVs, which will ensure that appeals are completed within the statutory timeframe.
- Assessor-Big Bear District: Addition of 1 Appraiser II and 1 Office Assistant III, which will serve to expand public office hours in this district office.
- Assessor-Transfers: Addition of 1 Title Transfer Technician I, which is necessary to process the increase in property transfer documents that have resulted from the improvement in the housing market. Deletion of 1 Office Assistant II, as this position does not meet the current needs of the Department.
- Assessor-Data Systems: Addition of 1 Automated Systems Technician, which will enable the unit to meet the current demand for services and prevent delays in restoring users to full production capacity.
- Recorder: Addition of 1 Lead Legal Document Classifier and 2 Legal Document Classifier IIs, which will reduce wait time for customers and provide better oversight of Recorder staff. Deletion of 1 Secretary I, as this position does not meet the current needs of the Department.
- Mapping: Deletion of 2 Cadastral Drafting Technician Is, as these positions do not meet the current needs of the Department.



2013-14 POSITION SUMMARY

<u>Division</u>	<u>Regular</u>	<u>Limited Term</u>	<u>Total</u>	<u>Filled</u>	<u>Vacant</u>	<u>New</u>	<u>Total</u>
Management and Administrative Services	8	0	8	8	0	0	8
Assessment Services	52	0	52	48	2	2	52
Valuations	108	0	108	97	7	4	108
Recorder Services	53	0	53	45	5	3	53
Total	221	0	221	198	14	9	221

Management and Administrative Services	Assessment Services	Valuations
<u>Classification</u>	<u>Classification</u>	<u>Classification</u>
1 Assessor/Recorder	1 Chief of Assessment Services	1 Chief Appraiser
1 Assistant Assessor/Recorder	1 Supervising Office Specialist	3 Principal Appraiser
1 Executive Secretary III	2 Supervising Office Assistant	8 Supervising District Appraiser
1 Administrative Supervisor II	1 Office Specialist	8 Appraiser IV
1 Staff Analyst II	13 Office Assistant III	5 Appraiser III
1 Staff Analyst I	3 Office Assistant II	11 Appraiser II
1 Payroll Specialist	1 Supv Title Trans Technician II	30 Appraiser I
1 Fiscal Assistant	1 Supv Title Transfer Technician I	13 Appraisal Technician
8 Total	3 Title Transfer Technician II	2 Supervising Auditor Appraiser
	15 Title Transfer Technician I	1 Auditor-Appraiser III
	1 Cadastral Services Supervisor	9 Auditor-Appraiser II
	1 Cadastral Drafting Technician III	16 Office Assistant III
	2 Cadastral Drafting Technician II	1 Office Assistant II
	1 Cadastral Drafting Technician I	108 Total
	1 Business Systems Analyst III	
	1 Business Systems Analyst II	
	2 Automated Systems Analyst I	
	2 Automated Systems Technician	
	52 Total	
Recorder Services		
<u>Classification</u>		
1 County Clerk		
1 Chief Deputy Recorder		
1 Staff Analyst I		
2 Legal Document Coordinator		
2 Legal Document Supervisor		
3 Lead Legal Document Classifier		
23 Legal Document Classifier II		
15 Legal Document Classifier I		
1 Accountant III		
2 Fiscal Assistant		
1 Office Assistant III		
1 Office Assistant II		
53 Total		



Recorder Special Revenue Funds - Consolidated

DESCRIPTION OF MAJOR SERVICES

Systems Development was established to support, maintain and modernize the creation, retention and retrieval of information in the County's system of recorded documents. Sources include fees collected pursuant to Government Code Section 27361 on legal documents.

Budget at a Glance	
Total Requirements	\$12,611,172
Total Sources	\$4,490,092
Fund Balance	\$8,121,080
Use of Fund Balance	\$2,429,391
Total Staff	11

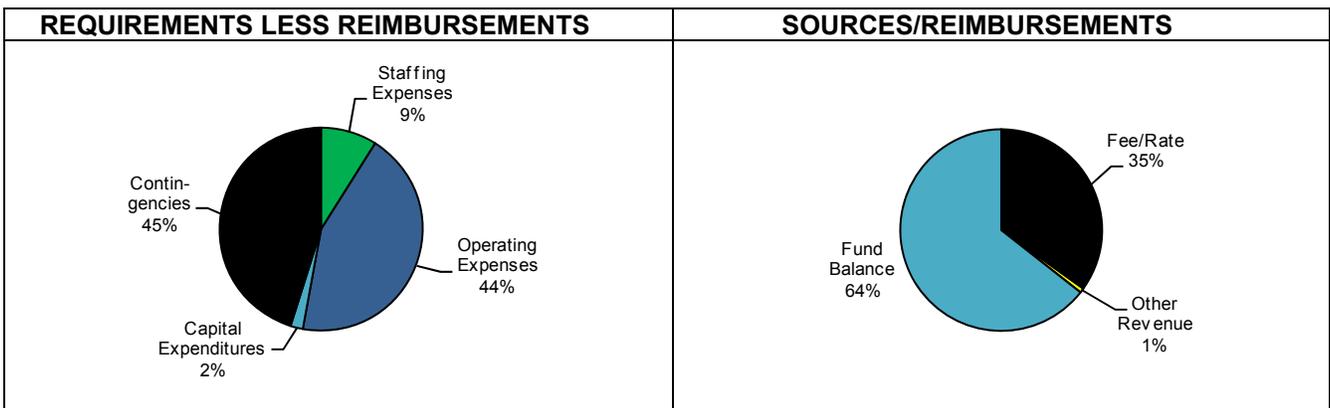
Vital Records was established to support vital records operation and retention, including the improvement and automation of vital records systems. Sources include fees collected for certified copies of vital statistics records pursuant to Health and Safety Code Section 10605.3. There is no staffing associated with this budget unit.

Electronic Recording was established by Government Code Section 27279.1 to authorize the County of San Bernardino to accept electronic transmission of recordable documents and the Recorder has been recording electronic documents since 2004. Government Code Section 27397 authorized all California counties to accept electronic transmission of recordable documents subject to regulation set forth by the Attorney General. In 2007, the Board approved a joint powers agreement (JPA) for the California e-Recording Transaction Network Authority (CeRTNA). This budget unit was established to support participation in the JPA. Sources include fees collected pursuant to Government Code Section 27397 regarding electronic recording delivery systems such as official records evidencing ownership and encumbrances of real and personal property, and other miscellaneous records. There is no staffing associated with this budget unit.

Recorder Records was established to defray the cost of storing, restoring, and imaging the County Recorder's documents. The primary service provided by this budget unit is the maintenance, repair and imaging digitization of the County Recorder's documents. Sources include fees collected pursuant to Government Code Section 27361 on legal documents.

Social Security Number Truncation was established to defray the cost of implementing Government Code Section 27301 which requires local governments to truncate the first five digits of social security numbers (SSN) that appear in records that may be disclosed to the public. The law requires the Recorder to implement the SSN truncation program for all records back to 1980. The primary service provided by this budget unit is the review of all recorded documents, flagging of high-value personal information, truncation of the first five digits of the SSN, and the creation of a separate index and images for public view. Phase 1 began with all the documents recorded since January 2009. Phase 2 will require a professional services contract for the documents from 1980 through 2007. The index and images of the original recorded documents will be maintained in their entirety. Sources include fees collected pursuant to Government Code Section 27301. There is no staffing associated with this budget unit.

2013-14 RECOMMENDED BUDGET



BUDGETED STAFFING

STAFFING ANALYSIS					5-YEAR STAFFING TREND				
	2011-12	2012-13	2012-13	2013-14					
Authorized Positions	Final	Adopted	Modified	Recommended					
Regular	4	12	12	11					
Limited Term	0	0	0	0					
Total	4	12	12	11					
Staffing Expenses	\$276,297	\$1,240,720	\$1,240,720	\$1,128,911					

Fiscal Year	Staffing Count
2009-10	39
2010-11	4
2011-12	4
2012-13	12
2013-14	11

ANALYSIS OF 2013-14 RECOMMENDED BUDGET

GROUP: Fiscal
 DEPARTMENT: Assessor/Recorder/County Clerk
 FUND: Recorder Special Revenue Funds - Consolidated

BUDGET UNIT: Various
 FUNCTION: Public Protection
 ACTIVITY: Other Protection

	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Estimate	2012-13 Modified Budget	2013-14 Recommended Budget	Change From 2012-13 Modified Budget
Requirements							
Staffing Expenses	1,730,575	258,535	275,068	957,469	1,240,720	1,128,911	(111,809)
Operating Expenses	3,262,916	3,908,584	3,820,113	1,575,350	4,647,029	5,540,572	893,543
Capital Expenditures	267,995	24,460	12,173	72,057	222,057	250,000	27,943
Contingencies	0	0	0	0	3,880,608	5,691,689	1,811,081
Total Exp Authority	5,261,486	4,191,579	4,107,354	2,604,876	9,990,414	12,611,172	2,620,758
Reimbursements	0	(6,564)	(118,732)	0	(65,068)	0	65,068
Total Appropriation	5,261,486	4,185,015	3,988,622	2,604,876	9,925,346	12,611,172	2,685,826
Operating Transfers Out	0	600,919	4,000,000	0	0	0	0
Total Requirements	5,261,486	4,785,934	7,988,622	2,604,876	9,925,346	12,611,172	2,685,826
Sources							
Taxes	0	0	0	0	0	0	0
Realignment	0	0	0	0	0	0	0
State, Fed or Gov't Aid	0	0	0	0	0	0	0
Fee/Rate	3,659,566	3,753,003	3,804,794	4,323,693	3,527,831	4,400,000	872,169
Other Revenue	108,539	105,125	92,356	91,836	87,088	90,092	3,004
Total Revenue	3,768,105	3,858,128	3,897,150	4,415,529	3,614,919	4,490,092	875,173
Operating Transfers In	0	0	0	0	0	0	0
Total Sources	3,768,105	3,858,128	3,897,150	4,415,529	3,614,919	4,490,092	875,173
Fund Balance					6,310,427	8,121,080	1,810,653
Budgeted Staffing					12	11	(1)



DETAIL OF 2013-14 RECOMMENDED BUDGET

	2013-14			
	Requirements	Sources	Fund Balance	Staffing
<u>Special Revenue Funds</u>				
Systems Development (Fund SDW)	6,210,440	2,825,000	3,385,440	8
Vital Records (Fund SDX)	966,139	130,000	836,139	0
Electronic Recording (Fund SIW)	1,475,716	502,952	972,764	0
Recorder Records (Fund SIX)	1,411,300	504,160	907,140	3
Social Security Number Truncation (Fund SST)	2,547,577	527,980	2,019,597	0
Total Special Revenue Funds	12,611,172	4,490,092	8,121,080	11

Systems Development includes \$6.2 million in requirements to fund 8 positions, costs for document indexing/imaging, computer hardware, software and associated maintenance, and includes \$2,139,550 in budgeted contingencies. Sources of \$2.8 million are from Recorder modernization fees.

Vital Records includes \$1.0 million in requirements to fund computer software, printing and other professional services, and includes \$760,571 in budgeted contingencies. Sources of \$130,000 are from vital and health statistic fees.

Electronic Recording includes \$1.5 million in requirements for computer hardware and CeRTNA related expenses, and includes approximately \$0.9 million in budgeted contingencies. Sources of \$502,952 are from electronic recording fees and anticipated interest earnings.

Recorder Records includes \$1.4 million in requirements for staffing expenses to fund 3 positions, costs associated with preservation efforts, and includes \$640,305 in budgeted contingencies. Sources of \$504,160 are from records fees and anticipated interest earnings.

Social Security Number Truncation includes \$2.6 million in requirements to fund the cost of truncating records as required by law, and includes \$1.2 million in budgeted contingencies. Sources of \$527,980 are from redaction fees and anticipated interest earnings.

BUDGET CHANGES AND OPERATIONAL IMPACT

Requirements are increasing by \$2.7 million primarily due to an increase in contingencies, increases in computer hardware, software and associated maintenances and the purchase of servers in the Systems Development budget unit, and a professional services contract to truncate records as required by law. These increases are partially offset by decreased staffing expenses due to the elimination of one position in the Recorder Records budget unit.

STAFFING CHANGES AND OPERATIONAL IMPACT

Staffing expenses of \$1.1 million fund 11 budgeted regular positions. The 2013-14 recommended budget includes the addition of 1 Automated Systems Analyst II and the deletion of 1 Business Systems Analyst III in the Systems Development budget unit, as well as the deletion of 1 Archives Analyst in the Recorder Records budget unit. These actions eliminate positions that do not meet the current needs of the Department and provide a new position that will enable the IT staff to more proactively meet the needs of the computer system.

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2013-14 POSITION SUMMARY

<u>Division</u>	<u>Regular</u>	<u>Limited Term</u>	<u>Total</u>	<u>Filled</u>	<u>Vacant</u>	<u>New</u>	<u>Total</u>
Systems Development	8	0	8	7	0	1	8
Recorder Records	3	0	3	3	0	0	3
Total	11	0	11	10	0	1	11

Systems Development		Recorder Records	
<u>Classification</u>		<u>Classification</u>	
1 Business Applications Manager		1 Archives Program Administrator	
2 Programmer Analyst III		1 Archives Technician	
1 Automated Systems Analyst II		1 Storekeeper	
3 Automated Systems Analyst I		<u>3 Total</u>	
1 Automated Systems Technician			
<u>8 Total</u>			

