

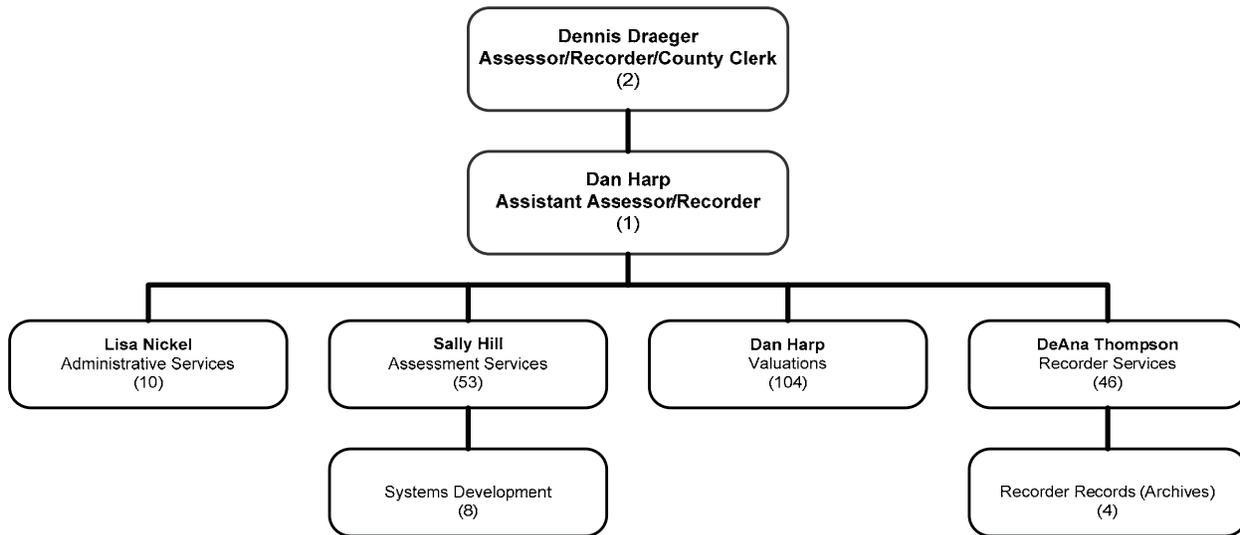
## ASSESSOR/RECORDER/COUNTY CLERK Dennis Draeger

### MISSION STATEMENT

*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



### 2010-11 AND 2011-12 ACCOMPLISHMENTS

- Integrated the AES Comparable Sales application into the Property Information Management System (PIMS) for greater efficiency and the ability to save data for future reference. This application also includes the ability to add photos to PIMS, thus saving appraisal time and increasing information available for the assessment process.
- Electronic filing (e-SDR) of annual business property statements by business owners increased 30% from the previous year. E-filing streamlines the process for the taxpayers and the Assessor’s Office. The Assessor further capitalized on the benefits of business property statement e-filing by giving business owners who have used the e-filing system the option of not receiving paper statements (571L), thus reducing printing and mailing costs.
- Developed applications to electronically store appeal related images.
- Moved the Assessor’s Yucca Valley district office from a leased facility to the Joshua Tree Government Center, greatly improving public access to services.
- Over 100 Assessor staff members participated in the County’s Energy Saver Power Strip program, saving the County \$21 annually per employee and reducing energy waste.
- Appointed Dan Harp as Assistant Assessor/Recorder. The assistant position had been vacant for 2 years. This appointment provides vital personnel and budget oversight as well as strategic planning for both the Assessor and Recorder functions.



**2012-13 GOALS, OBJECTIVES, AND PERFORMANCE MEASURES**

**GOAL 1: PUBLISH THE ANNUAL ASSESSMENT ROLL TIMELY AND ACCURATELY.**

*Objective A: Process changes of ownership.*  
*Objective B: Establish a value for appraisable events.*  
*Objective C: Apply timely filed exemptions.*

Measurement	2009-10 Actual	2010-11 Actual	2011-12 Target	2011-12 Estimate	2012-13 Target
1A. Completion percentage of change of ownership documents received for each assessment year.	99.9%	99.9%	95.5%	95.5%	95.5%
1B. Completion percentage of appraisable events received for each assessment year (e.g. change of ownership, new construction, etc.).	98.4%	99%	99%	99%	99%
1C. Completion percentage of timely filed claims for exemption (e.g. homeowner's, welfare church, etc.) received for each assessment year.	99.9%	99.6%	95.5%	95.5%	95.5%

The Assessor/Recorder/County Clerk continues to reflect the status of the real estate market on the assessment roll. Changes in ownership resulting in decline in assessed values continue to be posted; however, published supplemental rolls have reflected modest positive assessed totals. Overall, assessed values are declining at a slower pace. In 2010, the assessment roll declined 4.5% compared to 2009, and the 2011 assessment roll declined only 0.87%. Timely filed claims for homeowners decreased 1% and institutional exemptions have slightly increased (3%) from 2010 to 2011.

**GOAL 2: MAINTAIN A HIGH LEVEL OF RECORDER SERVICES WHILE RESPONDING TO CHANGES IN REGULATIONS AND LAW.**

*Objective A: Maintain a high quality of service in current offices.*  
*Objective B: Identify and comply with all legislative mandates.*

Measurement	2009-10 Actual	2010-11 Actual	2011-12 Target	2011-12 Estimate	2012-13 Target
2A. Every document received is processed within the established standard.	99%	95%	99%	99%	99%
2B. Compliance percentage in meeting deadlines for legislative directives.	100%	100%	100%	100%	100%

The priority of the Recorder function is to maintain a high quality level of service to the public while responding to the various changes in laws and regulations, as well as meeting deadlines for implementation. The first objective is to record, file, or process each document within the established standard for that document. Measurement 2A allows for a 1% error rate due to the volume of documents being processed. Customer service is enhanced when all service standards are met. The Recorder's Office is committed to responding to the ever-changing legislative and administrative regulations, including changes to marriage regulations, social security number truncation, and new regulations regarding mortgages and mechanic's liens. Meeting the state's changing mandates and deadlines is an ongoing challenge.



**SUMMARY OF BUDGET UNITS**

	2012-13					
	Appropriation	Revenue	Net County Cost	Fund Balance	Revenue Over/ (Under) Exp	Staffing
<b>General Fund</b>						
Assessor/Recorder/County Clerk	21,770,606	6,563,500	15,207,106			216
Total General Fund	21,770,606	6,563,500	15,207,106			216
<b>Special Revenue Funds</b>						
Recorder Special Revenue Funds - Consolidated	9,360,927	3,614,919		5,746,008		12
Total Special Revenue Funds	9,360,927	3,614,919		5,746,008		12
<b>Total - All Funds</b>	<b>31,131,533</b>	<b>10,178,419</b>	<b>15,207,106</b>	<b>5,746,008</b>		<b>228</b>

<b>5-YEAR APPROPRIATION TREND</b>					
	2008-09	2009-10	2010-11	2011-12	2012-13
Assessor/Recorder/County Clerk	19,138,707	16,410,047	17,909,126	20,026,859	21,770,606
Systems Development	16,380,504	12,515,096	10,290,230	8,540,017	3,743,855
Vital Records	655,244	765,625	863,395	914,821	887,795
Recorder Records	1,034,032	1,306,567	1,488,363	1,571,280	1,256,163
Electronic Recording	587,620	623,348	933,322	1,096,392	1,091,678
Social Security Number Truncation	695,792	1,164,482	1,564,602	2,053,020	2,381,436
<b>Total</b>	<b>38,491,899</b>	<b>32,785,165</b>	<b>33,049,038</b>	<b>34,202,389</b>	<b>31,131,533</b>

<b>5-YEAR REVENUE TREND</b>					
	2008-09	2009-10	2010-11	2011-12	2012-13
Assessor/Recorder/County Clerk	1,050,000	895,818	3,470,815	5,348,400	6,563,500
Systems Development	2,504,529	2,090,730	2,337,984	2,239,000	2,196,041
Vital Records	165,839	142,788	131,813	132,000	125,684
Recorder Records	485,000	467,341	451,670	471,454	418,907
Electronic Recording	485,000	459,464	446,468	465,430	422,304
Social Security Number Truncation	485,000	492,707	490,121	500,652	451,983
<b>Total</b>	<b>5,175,368</b>	<b>4,548,848</b>	<b>7,328,871</b>	<b>9,156,936</b>	<b>10,178,419</b>

<b>5-YEAR NET COUNTY COST TREND</b>					
	2008-09	2009-10	2010-11	2011-12	2012-13
Assessor/Recorder/County Clerk	18,088,707	15,514,229	14,438,311	14,678,459	15,207,106
<b>Total</b>	<b>18,088,707</b>	<b>15,514,229</b>	<b>14,438,311</b>	<b>14,678,459</b>	<b>15,207,106</b>

<b>5-YEAR FUND BALANCE TREND</b>					
	2008-09	2009-10	2010-11	2011-12	2012-13
Systems Development	13,875,975	10,424,366	7,952,246	6,301,017	1,547,814
Vital Records	489,405	622,837	731,582	782,821	762,111
Recorder Records	549,032	839,226	1,036,693	1,099,826	837,256
Electronic Recording	102,620	163,884	486,854	630,962	669,374
Social Security Number Truncation	210,792	671,775	1,074,481	1,552,368	1,929,453
<b>Total</b>	<b>15,227,824</b>	<b>12,722,088</b>	<b>11,281,856</b>	<b>10,366,994</b>	<b>5,746,008</b>



## Assessor/Recorder/County Clerk

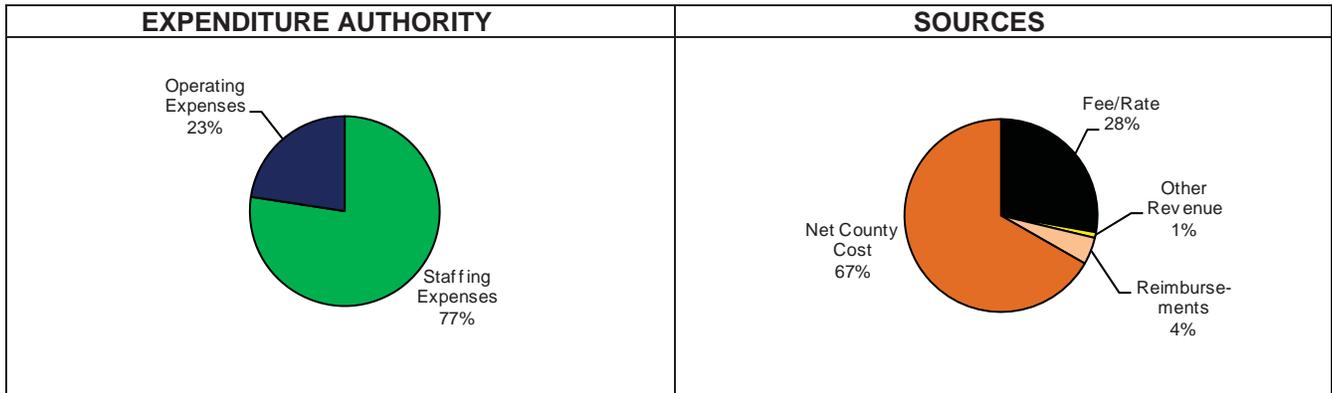
### DESCRIPTION OF MAJOR SERVICES

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 753,641 parcels of real property, 33,731 business property accounts and 33,883 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.

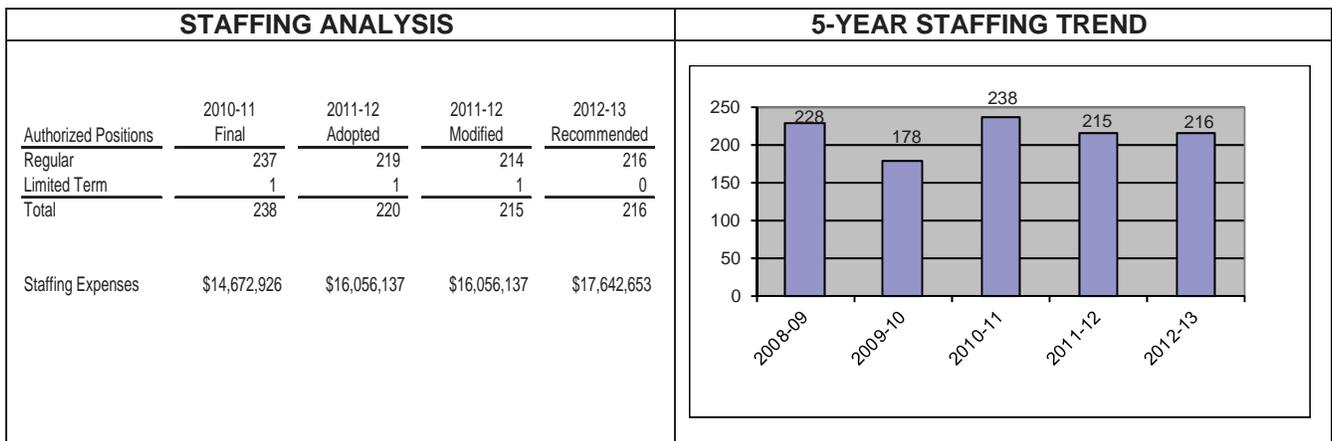
Budget at a Glance	
Total Expenditure Authority	\$22,811,373
Total Sources	\$7,604,267
Net County Cost	\$15,207,106
Total Staff	216
Funded by Net County Cost	67%

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.

### 2012-13 RECOMMENDED BUDGET



### BUDGETED STAFFING



## ANALYSIS OF 2012-13 RECOMMENDED BUDGET

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

BUDGET UNIT: AAA ASR  
FUNCTION: General  
ACTIVITY: Finance

	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Estimate	2011-12 Modified Budget	2012-13 Recommended Budget	Change From 2011-12 Modified Budget
<b>Appropriation</b>							
Staffing Expenses	15,437,368	13,433,612	14,672,925	16,150,535	16,056,137	17,642,653	1,586,516
Operating Expenses	3,462,401	2,974,435	3,207,612	6,097,662	6,238,684	5,148,720	(1,089,964)
Capital Expenditures	0	0	67,807	34,285	0	20,000	20,000
Contingencies	0	0	0	0	0	0	0
Total Exp Authority	18,899,769	16,408,047	17,948,344	22,282,482	22,294,821	22,811,373	516,552
Reimbursements	0	0	(39,553)	(1,905,160)	(2,267,962)	(1,040,767)	1,227,195
Total Appropriation	18,899,769	16,408,047	17,908,791	20,377,322	20,026,859	21,770,606	1,743,747
Operating Transfers Out	29,713	0	0	0	0	0	0
Total Requirements	18,929,482	16,408,047	17,908,791	20,377,322	20,026,859	21,770,606	1,743,747
<b>Departmental Revenue</b>							
Taxes	74,770	53,006	24,875	16,546	35,000	16,500	(18,500)
Realignment	0	0	0	0	0	0	0
State, Fed or Gov't Aid	0	0	0	0	0	0	0
Fee/Rate	874,544	514,358	3,220,307	5,553,860	5,065,700	6,335,000	1,269,300
Other Revenue	263,867	328,454	225,669	211,661	247,700	212,000	(35,700)
Total Revenue	1,213,181	895,818	3,470,851	5,782,067	5,348,400	6,563,500	1,215,100
Operating Transfers In	0	0	0	0	0	0	0
Total Financing Sources	1,213,181	895,818	3,470,851	5,782,067	5,348,400	6,563,500	1,215,100
Net County Cost	17,716,301	15,512,229	14,437,940	14,595,255	14,678,459	15,207,106	528,647
				Budgeted Staffing	215	216	1

## BUDGET CHANGES AND OPERATIONAL IMPACT

Appropriation is increasing by \$1.7 million primarily as a result of the elimination of the proposed work week reduction and staff being fully budgeted at 80 hours per pay period in 2012-13. Operating expenses are reduced primarily due to a reduction in transfers to the Auditor-Controller/Treasurer/Tax Collector for reimbursement of information technology (IT) staffing and operating expenses as these positions and functions have been transferred to the Assessor/Recorder/County Clerk's Systems Development budget unit for 2012-13. Reimbursements are also reduced as a result of the transfer of information technology related costs to the Systems Development budget unit, as these costs were reimbursed from this budget unit in prior years. Departmental revenue is increasing due to recommended fee increases.

## MAJOR EXPENDITURES AND REVENUE IN 2012-13 RECOMMENDED BUDGET

Staffing expenses of \$17,642,653 fund 216 positions. Operating expenses consist primarily of printing and taxpayer notice mailing costs, COWCAP, and systems development charges for the Property Information Management System (PIMS). Capital expenditures of \$20,000 fund the replacement of flooring at the Recorder offices. Reimbursements of \$1,040,767 are primarily from the Recorder special revenue funds for administrative costs.

Departmental revenue of \$6,563,500 includes fees for recording and County Clerk services, special assessments, transfers of ownership, and PIMS access.



**STAFFING CHANGES AND OPERATIONAL IMPACT**

The 2012-13 budget includes the reclassification of 2 Appraiser IIs to Appraiser IIIs and 1 Auditor-Appraiser II to Auditor-Appraiser III, as well as the addition of 1 Supervising Auditor Appraiser, 1 Staff Analyst II, and 1 Appraiser III position. The reclassifications and additional Supervising Auditor Appraiser will result in increased oversight to assure quality work, while the new Appraiser III position in the Assessment Appeals unit will ensure that appeals are completed within the statutory timeframe, preventing valuations from being lowered without the County's input. The Staff Analyst II position will assist with preparation and oversight of the department's budgets and assume some of the duties formerly completed by an Accountant III in the Auditor-Controller/Treasurer/Tax Collector's Office, which was reimbursed by this budget unit. The Accountant III will no longer be performing Recorder functions, so the reimbursement has been eliminated for 2012-13. The 3 new positions are offset by the reduction of 1 Contract PIMS Analyst, and 1 Auditor-Appraiser III.

**2012-13 POSITION SUMMARY**

Division	Regular	Limited Term	Total	Filled	Vacant	New	Total
Management & Administrative Services	12	0	12	11	0	1	12
Assessment Services	53	0	53	51	2	0	53
Valuations	104	0	104	98	4	2	104
Recorder Services	47	0	47	39	8	0	47
<b>Total</b>	<b>216</b>	<b>0</b>	<b>216</b>	<b>199</b>	<b>14</b>	<b>3</b>	<b>216</b>

Management & Administrative Services		Valuations		Recorder Services	
Classification		Classification		Classification	
1 Assessor/Recorder		1 Chief Appraiser		1 County Clerk	
1 Assistant Assessor/Recorder		3 Principal Appraiser		1 Chief Deputy Recorder	
1 Executive Secretary III		8 Supervising District Appraiser		1 Secretary I	
1 Administrative Supervisor II		10 Appraiser III		1 Staff Analyst I	
1 Staff Analyst II		10 Appraiser II		2 Legal Document Coordinator	
1 Staff Analyst I		30 Appraiser I		2 Legal Document Supervisor	
1 Payroll Specialist		13 Appraisal Technician		2 Lead Legal Document Classifier	
1 Accountant II		2 Supervising Auditor Appraiser		21 Legal Document Classifier II	
3 Fiscal Assistant		2 Auditor-Appraiser III		15 Legal Document Classifier I	
1 Office Assistant III		9 Auditor-Appraiser II		1 Office Assistant II	
<b>12 Total</b>		15 Office Assistant III		<b>47 Total</b>	
		1 Office Assistant II			
		<b>104 Total</b>			
<b>Assessment Services</b>					
<u>Classification</u>					
1 Chief of Assessment Services					
1 Supervising Office Specialist					
2 Supervising Office Assistant					
1 Office Specialist					
13 Office Assistant III					
4 Office Assistant II					
1 Supv Title Trans Technician II					
1 Supv Title Transfer Technician I					
3 Title Transfer Technician II					
14 Title Transfer Technician I					
1 Cadastral Services Supervisor					
1 Cadastral Drafting Technician III					
2 Cadastral Drafting Technician II					
3 Cadastral Drafting Technician I					
1 Business Systems Analyst III					
1 Business Systems Analyst II					
2 Automated Systems Analyst I					
1 Automated Systems Technician					
<b>53 Total</b>					

FISCAL



## 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. Revenue includes fees collected pursuant to Government Code Section 27361 on legal documents.

Budget at a Glance	
Total Expenditure Authority	\$9,425,995
Total Sources	\$3,679,987
Fund Balance	\$5,746,008
Total Staff	12

**Vital Records** was established to support vital records operation and retention, including the improvement and automation of vital records systems. Revenue includes 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.

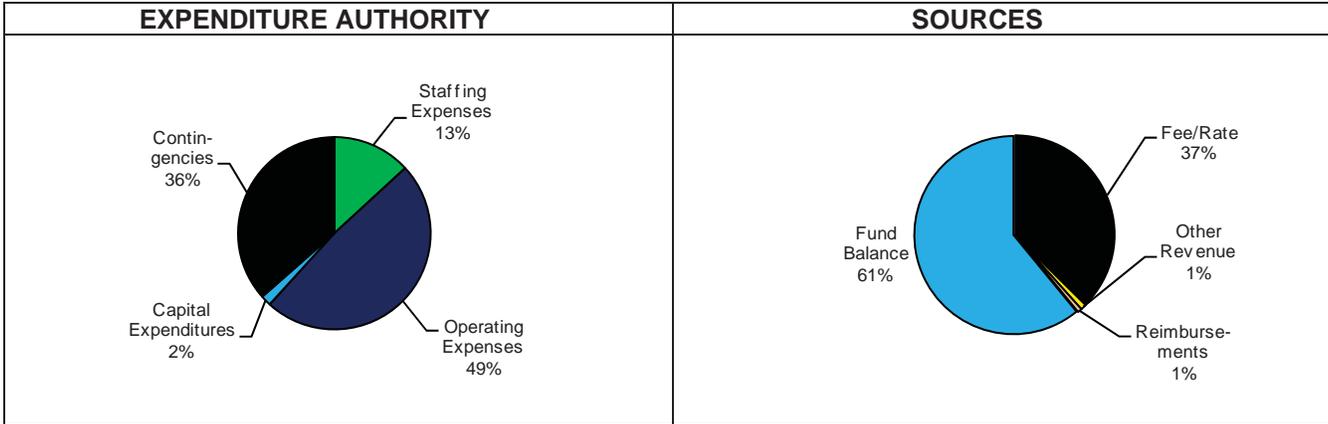
**Recorder Records** was established to defray the cost of storing, restoring, and imaging the County Recorder's documents. The primary service provided by this budget unit is the maintenance, repair and imaging digitization of the County Recorder's documents. Revenue includes fees collected pursuant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

**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. Revenue includes 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.

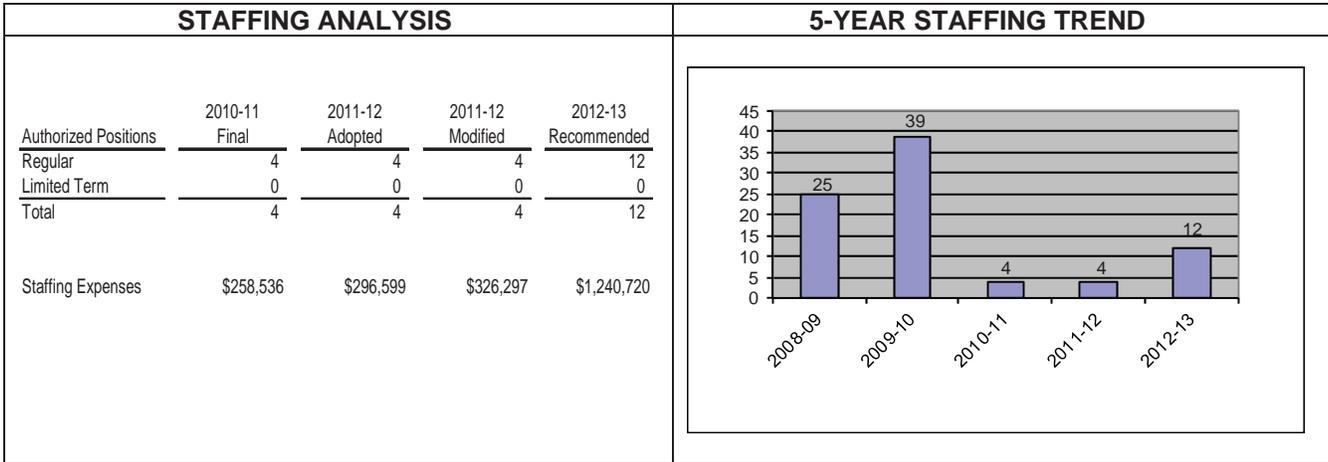
**Social Security Number Truncation** was established to defray the cost of implementing Government Code Section 27301 which requires local governments to truncate the first five digits of social security numbers (SSN) that appear in records that may be disclosed to the public. The law requires the Recorder 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 2008. The index and images of the original recorded documents will be maintained in their entirety. Revenue includes fees collected pursuant to Government Code Section 27301. There is no staffing associated with this budget unit.



**2012-13 RECOMMENDED BUDGET**



**BUDGETED STAFFING**



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**ANALYSIS OF 2012-13 RECOMMENDED BUDGET**

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

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

	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Estimate	2011-12 Modified Budget	2012-13 Recommended Budget	Change From 2011-12 Modified Budget
<b>Appropriation</b>							
Staffing Expenses	1,675,412	1,730,575	258,535	276,970	326,297	1,240,720	914,423
Operating Expenses	3,847,382	3,262,916	3,908,584	4,014,619	7,296,407	4,579,321	(2,717,086)
Capital Expenditures	296,010	267,995	24,460	12,174	225,924	165,000	(60,924)
Contingencies	0	0	0	0	2,401,970	3,440,954	1,038,984
Total Exp Authority	5,818,804	5,261,486	4,191,579	4,303,763	10,250,598	9,425,995	(824,603)
Reimbursements	(3,745)	0	(6,564)	(65,068)	(75,068)	(65,068)	10,000
Total Appropriation	5,815,059	5,261,486	4,185,015	4,238,695	10,175,530	9,360,927	(814,603)
Operating Transfers Out	1,000,000	0	600,919	4,000,000	4,000,000	0	(4,000,000)
Total Requirements	6,815,059	5,261,486	4,785,934	8,238,695	14,175,530	9,360,927	(4,814,603)
<b>Departmental Revenue</b>							
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	3,593,589	3,659,566	3,753,003	3,527,831	3,701,000	3,527,831	(173,169)
Other Revenue	124,038	108,539	105,125	89,878	107,536	87,088	(20,448)
Total Revenue	3,717,627	3,768,105	3,858,128	3,617,709	3,808,536	3,614,919	(193,617)
Operating Transfers In	0	0	0	0	0	0	0
Total Financing Sources	3,717,627	3,768,105	3,858,128	3,617,709	3,808,536	3,614,919	(193,617)
				Fund Balance	10,366,994	5,746,008	(4,620,986)
				Budgeted Staffing	4	12	8

**BUDGET CHANGES AND OPERATIONAL IMPACT**

Appropriation is decreasing by \$4.8 million primarily due to a one-time expense in 2011-12 in the Systems Development budget unit to fund the cost of including Recording functionality in the new Universal Property Tax System. In addition, staffing expenses are increased as a result of the transfer of 8 information technology (IT) related positions from the Auditor-Controller/Treasurer/Tax Collector's budget unit to the Systems Development budget unit. Operating expenses are reduced due to a reduction in scope of an imaging project. Departmental revenue is expected to decrease due to current economic conditions.

**DETAIL OF 2012-13 RECOMMENDED BUDGET**

	2012-13			
	Appropriation	Revenue	Fund Balance	Staffing
<b>Special Revenue Funds</b>				
Systems Development	3,743,855	2,196,041	1,547,814	8
Vital Records	887,795	125,684	762,111	0
Recorder Records	1,256,163	418,907	837,256	4
Electronic Recording	1,091,678	422,304	669,374	0
Social Security Number Truncation	2,381,436	451,983	1,929,453	0
Total Special Revenue Funds	9,360,927	3,614,919	5,746,008	12

**Systems Development** includes \$3,743,855 in appropriation to fund 8 IT related positions, and costs for document indexing/imaging, computer hardware, software and associated maintenance, and includes \$562,011 in budgeted contingencies. Departmental revenue of \$2,196,041 is from Recorder modernization fees.



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**Vital Records** includes \$887,795 in appropriation to fund computer software, printing and other professional services, costs to accommodate Recorder services into existing Assessor office locations, and includes \$568,048 in budgeted contingencies. Departmental revenue of \$125,684 is from vital and health statistic fees.

**Recorder Records** includes \$1,256,163 in appropriation for staffing expenses to fund 4 positions, costs associated with preservation efforts, and includes \$417,145 in budgeted contingencies; departmental revenue of \$418,907 is from records fees and anticipated interest earnings.

**Electronic Recording** includes \$1,091,678 in appropriation for computer hardware and CERTNA related expenses, and includes \$535,768 in budgeted contingencies; departmental revenue of \$422,304 is from electronic recording fees and anticipated interest earnings.

**Social Security Number Truncation** includes \$2,381,436 in appropriation to fund the cost of truncating records as required by law, and includes \$1,357,982 in budgeted contingencies; departmental revenue of \$451,983 is from redaction fees and anticipated interest earnings.

**STAFFING CHANGES AND OPERATIONAL IMPACT**

The 2012-13 budget reflects the transfer of the following 8 positions from the Auditor-Controller/Treasurer/Tax Collector's budget unit to the Systems Development budget unit: 1 Business Applications Manager, 1 Business Systems Analyst III, 2 Programmer Analyst IIIs, 3 Automated Systems Analyst Is and 1 Automated Systems Technician. Expenses for these positions were previously reimbursed to the Auditor-Controller/Treasurer/Tax Collector so there should not be any resulting impact.

**2012-13 POSITION SUMMARY**

Division	Regular	Limited Term	Total	Filled	Vacant	New	Total
Systems Development	8	0	8	6	2	0	8
Recorder Records	4	0	4	3	1	0	4
Total	12	0	12	9	3	0	12

Systems Development		Recorder Records	
Classification		Classification	
1 Business Applications Manager		1 Archives Program Administrator	
1 Business Systems Analyst III		1 Archives Analyst	
2 Programmer Analyst III		1 Archives Technician	
3 Automated Systems Analyst I		1 Storekeeper	
1 Automated Systems Technician		4 Total	
8 Total			

