



County Clerk's Office

FY23-24 BUDGET PRESENTATION



FY22-23 Major Accomplishments

AREA	DESCRIPTION
Elections	Fully staffed (5 FTE) as of April 2023 after being understaffed since November 2020. Recruited, hired, and trained first bilingual Election Specialist.
Recording	Will issue approximately 1585 marriage licenses for happy couples this year. 9% less than FY 21-22.
Records Management	Supported county departments in responding to public records requests through research and retrieval; responded to record-breaking demand, processing more than 4,400 passport applications for Clackamas County residents and surrounding areas.
Board of Property Tax Appeals	Heard nearly 200 property value appeals in the past year, providing Clackamas County property owners an opportunity to adjust their property value in an evidence-based forum.

Line of Business/Program	Results Measure	FY21-22 Actual	FY22-23 Target	FY22-23 Projected Performance	FY23-24 Target
Elections	Overall election cost per eligible voter.	\$1.94	NA	\$1.38	\$1.26
	Election personnel cost per 1,000 ballots processed.	\$2,872	NA	\$630	\$550
Recording	% of recorded documents indexed within five business days of being recorded.	Not Tracked	NA	Not Tracked	75%
Records Management	% Department Records Requests delivered within one business day.	100%	100%	100%	100%

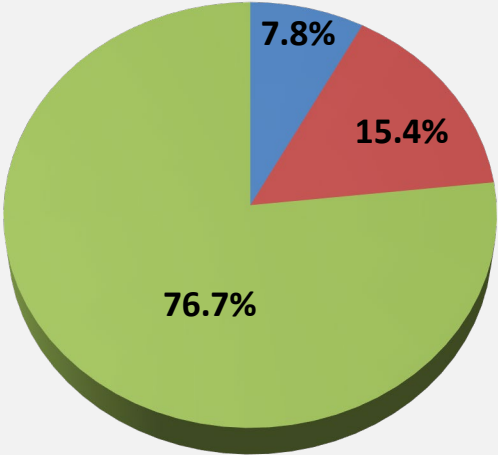
Many results measures in Recording were not tracked in FY21-22 or FY22-23. Target results measures were not determined in FY22-23 in Elections. Clerk McMullen took office in Jan. 2023 and results measures were evaluated and changed across all divisions and the department.

Program Profiles: FY23-24 Summary

Program Name	BCC Priority	Total Funds (in Millions)	% County General Fund	% Restricted Funds	Mandate: Fed/State/City /IGA/None	% Program Operated by County	Metrics: % Target Meet/Exceed/Improve
Office of the Clerk	Accountable Government	\$0.574	0%	0%	Fed/State	100%	Improve
Elections	Accountable Government	\$2.409	0%	0%	Fed/State/City	100%	Meet
Recording	Accountable Government	\$0.739	0%	0%	Fed/State/City	100%	Improve
Records Management (includes Passports)	Accountable Government	\$0.723	0%	0%	Fed/State/City	100%	Meet
Board of Property Tax Appeals	Accountable Government	\$0.008	0%	0%	State/City	100%	Meet

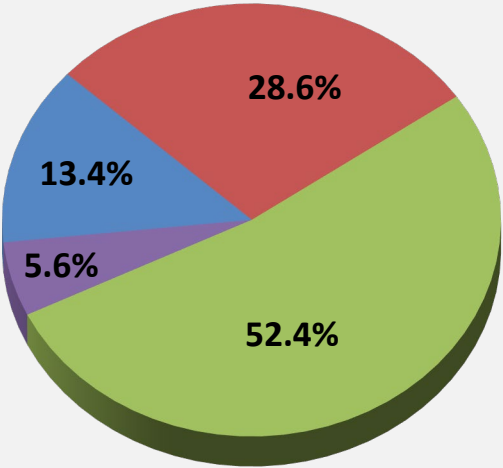
FY23-24 Revenue and Expenses

Revenues



- All Other Revenue Resources
- Beginning Fund Balance
- Charges, Fees, License, Permits, Fines, Assessments

Expenses



- Capital Outlay
- Materials and Services
- Personnel Services
- Special Payments
- Unappropriated Ending Fund Balance



County Clerk (13)

Department Budget Summary by Fund

<i>Line of Business Name</i>	<i>Program Name</i>	FY 23-24 General Fund (100)	FY 23-24 ARPA Fund (230)	FY 23-24 Total Budget	FY 23-24 General Fund Support in Budget**	FY 23-24 Total FTE
Clerk's Office	Office of the Clerk	582,122		582,122	-	3.5
Clerk's Office	Board of Property Tax Appeals (BOPTA)	12,000	-	12,000	-	-
Clerk's Office	Elections	2,409,003		2,409,003	-	5.0
Clerk's Office	Recording	739,309	-	739,309	-	5.5
Clerk's Office	Records Management	723,896	-	723,896	-	5.0
		4,466,329	-	4,466,329	-	19.0
FY 22-23 Budget (Amended)		4,448,561	-	4,448,558	-	19.0
\$ Increase (Decrease)		17,768	-	17,771	-	0.0
% Increase (Decrease)		0.4%	-	0.4%	-	0.0%

****General Fund Support is the subsidy, net of any other revenue received by the department.**

**13-County Clerk / 100-General Fund
Summary of Revenue and Expense**

	FY20-21 Actuals	FY21-22 Actuals	FY22-23 Amended Budget	FY22-23 Projected Year-End	FY23-24 Budget	\$ Change from Prior Year Budget	% Change from Prior Year Budget
Beginning Fund Balance	368,076	391,460	150,588	1,176,850	689,418	538,830	358%
Federal, State, Local, All Other Gifts & Donations	157,800	-	-	20,000	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	5,630,101	4,082,020	4,047,970	3,088,695	3,426,913	(621,057)	-15%
All Other Revenue Resources	297,278	412,871	250,000	225,000	350,000	100,000	40%
Operating Revenue	6,085,179	4,494,892	4,297,970	3,333,695	3,776,913	(521,057)	-12%
Total Revenue	6,453,254	4,886,352	4,448,558	4,510,545	4,466,331	17,773	0%
Personnel Services	1,689,871	2,069,290	2,188,117	2,012,648	2,341,968	153,851	7%
Materials and Services	1,684,450	1,462,217	1,743,924	1,611,479	1,276,361	(467,563)	-27%
Capital Outlay	2,925	4,690	8,000	-	600,000	592,000	7400%
Operating Expenditure	3,377,245	3,536,198	3,940,041	3,624,127	4,218,329	278,288	7%
Debt Service	-	-	-	-	-	-	-
Special Payments	161,426	173,304	232,000	197,000	248,000	16,000	7%
Total Expense	3,538,671	3,709,502	4,172,041	3,821,127	4,466,329	294,288	7%
Revenues Less Expenses	2,914,583	1,176,850	276,517	689,418	-		

FY21-22: Presentation changes are the result of the new county-wide chart of account implementation.

**General Fund Departments: Starting in FY20-21, amounts in Revenue Less Expenses will be moved into Non-Departmental at year-end.*

**13-County Clerk / 230-Special Grants Fund
Summary of Revenue and Expense**

	FY20-21 Actuals	FY21-22 Actuals	FY22-23 Amended Budget	FY22-23 Projected Year-End	FY23-24 Budget	\$ Change from Prior Year Budget	% Change from Prior Year Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts & Donations	-	13,907	-	-	-	-	-
Operating Revenue	-	13,907	-	-	-	-	-
Total Revenue	-	13,907	-	-	-	-	-
Personnel Services	-	13,907	-	-	-	-	-
Operating Expenditure	-	13,907	-	-	-	-	-
Total Expense	-	13,907	-	-	-	-	-
Revenues Less Expenses	-	-	-	-	-		

FY21-22: Presentation changes are the result of the new county-wide chart of account implementation.

Significant Policy and/or Financial Issues

Description	Impact
<p>Elections: Purchase of Elections Mail Ballot Sorter to increase efficiency of ballot processing and replace aging technology.</p>	<p>Will allow us to process increasing volume of ballots more efficiently and retain needed technology for elections administration; One-time expense.</p>
<p>Elections: Inflation increases cost of election staffing, material expenses, and vendor contracts.</p>	<p>Increases overall election cost per eligible voter; Ongoing impact.</p>
<p>Recording: Reduced revenue for recorded documents due to decreased housing activity (sales and refinances) and increased interest rates.</p>	<p>Reduces primary source of revenue; cyclical.</p>
<p>Recording: Increased revenue generation in Clerk's Office through officiating weddings.</p>	<p>Limited revenue generation; New and ongoing.</p>
<p>Records Management: Increased demand for passport application processing has increased revenue in Clerk's Office.</p>	<p>Increased demand for passport application processing increases revenue and maxes out demand on staff time and space to serve public; Ongoing impact.</p>

Thank you



County Clerk (13)

Department Budget Summary by Fund

<i>Line of Business Name</i>	<i>Program Name</i>	FY 23-24 General Fund (100)	FY 23-24 ARPA Fund (230)	FY 23-24 Total Budget	FY 23-24 General Fund Support in Budget**	FY 23-24 Total FTE
Clerk's Office	Office of the Clerk	582,122	-	582,122		3.5
Clerk's Office	Board of Property Tax Appeals (BOPTA)	12,000	-	12,000		
Clerk's Office	Elections	2,409,003	-	2,409,003		5.0
Clerk's Office	Recording	739,309	-	739,309		5.5
Clerk's Office	Records Management	723,896	-	723,896		5.0
		4,466,329	-	4,466,329		19.0
<i>FY 22-23 Budget (Amended)</i>		4,448,561	-	4,448,558		19.0
<i>\$ Increase (Decrease)</i>		17,768	-	17,771		0.0
<i>% Increase (Decrease)</i>		0.4%	-	0.4%		0.0%

****General Fund Support is the subsidy, net of any other revenue received by the department.**



County Clerk

Office of the Clerk




Purpose Statement

The purpose of the Office of the Clerk program is to provide leadership and policy services to the department so our programs can professionally and effectively serve the public and other government agencies.

Performance Narrative Statement

The Office of the Clerk program proposed a budget of \$582,122, a continuation of current funding levels. These resources will support office materials and services, training, and administrative costs of supporting elections, records management, property recording, property tax appeals, marriage and liquor licenses, wedding officiation, and passport services to the general public.

Key Performance Measures

		FY 21-22 Actual	FY 22-23 Target	FY 22-23 Projected	FY 23-24 Target
 Result	% Employees with annual performance summary completed	0%	NA	0%	100%
 Result	Number of community-focused events/meetings that the Clerk attends & engages with residents about services.	NA	25	25	55
 Result	% of elections administered that meet all statutory deadlines including certification.	NA	100%	75%	100%

*The program applies new measures moving into FY23-24.

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet
 If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



	FY20-21 Actuals	FY21-22 Actuals	FY22-23 Amended Budget	FY22-23 Projected Year- End	FY23-24 Budget	Change from Prior Yr Budget	% Change from Prior Yr Budget
Beginning Fund Balance	-	-	7,480	929,497	330,700	323,220	4321%
Taxes	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts & Donations	1,989	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	4,797,789	3,244,254	3,018,000	2,266,500	2,577,308	(440,692)	-15%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-
All Other Revenue Resources	128,408	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-
Operating Revenue	4,928,186	3,244,254	3,018,000	2,266,500	2,577,308	(440,692)	-15%
Total Revenue	4,928,186	3,244,254	3,025,480	3,195,997	2,908,008	(117,472)	-4%
Personnel Services	1,220,689	133,487	475,331	449,721	535,147	59,816	13%
Materials and Services	494,993	473,987	359,730	337,770	46,975	(312,755)	-87%
Capital Outlay	-	-	-	-	-	-	-
Operating Expense	1,715,682	607,474	835,061	787,491	582,122	(252,939)	-30%
Debt Service	-	-	-	-	-	-	-
Special Payments	4,083	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	276,520	-	-	(276,520)	-100%
Total Expense	1,719,765	607,474	1,111,581	787,491	582,122	(529,459)	-48%
Revenues Less Expenses	3,208,420	2,636,780	1,913,899	2,408,506	2,325,886		

Notes:
None.



County Clerk

Board of Property Tax Appeals


Purpose Statement

The purpose of the Clackamas County Board of Property Tax Appeals (BOPTA) program is to provide real property, personal property, and late filing fee appeals services to tax payers, so they can have their tax appeal petition heard and receive a decision in a timely manner.

Performance Narrative Statement

The Board of Property Tax Appeals program proposed a budget of \$12,000, a continuation of current funding levels. These resources will support office materials and board members, training, and administrative costs of reviewing property tax appeals and holding property tax appeals hearings.

Key Performance Measures

		FY 21-22 Actual	FY 22-23 Target	FY 22-23 Projected	FY 23-24 Target
 Result	% Petitioners who received a decision/order from the Clerk's office within five business days	100%	100%	90%	100%

Program includes:

Mandated Services	<input type="text" value="Yes"/>
Shared Services	<input type="text" value="Yes"/>
Grant Funding	<input type="text" value="No"/>

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation The FTE for the BOPTA program is an employee that works and is paid on the Clerk program.



130102-Board of Property Tax Appeals (BOPTA)

BCC Priority Alignment: Accountable Government

Budget Summary

	FY20-21 Actuals	FY21-22 Actuals	FY22-23 Amended Budget	FY22-23 Projected Year- End	FY23-24 Budget	Change from Prior Yr Budget	% Change from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Taxes	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts & Donations	-	-	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-
Operating Revenue	-	-	-	-	-	-	-
Total Revenue	-	-	-	-	-	-	-
Personnel Services	-	1,045,683	-	-	-	-	-
Materials and Services	-	4,527	-	1,000	4,000	4,000	-
Capital Outlay	-	-	-	-	-	-	-
Operating Expense	-	1,050,210	-	1,000	4,000	4,000	-
Debt Service	-	-	-	-	-	-	-
Special Payments	-	-	12,000	7,000	8,000	(4,000)	-33%
Transfers	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-
Total Expense	-	1,050,210	12,000	8,000	12,000	-	0%
Revenues Less Expenses	-	(1,050,210)	(12,000)	(8,000)	(12,000)		

Notes:
None.








Purpose Statement

The purpose of the Elections program is to provide voter registration, information, ballot delivery, ballot return drop sites, and election services to Clackamas County voters and local governments so they can participate in a secure, impartial, and transparent electoral process.

Performance Narrative Statement

The Elections program proposed a \$2,409,003 budget, an increase in funding levels due to the need to replace our aging mail ballot sorter, be prepared for the upcoming presidential election cycle (May 2024). These resources will serve all Clackamas County residents, candidates for elected office, those who file measures, and allowing local districts and jurisdictions to hold elections.

Key Performance Measures

		FY 21 - 22 Actual	FY 22-23 Target	FY 22-23 Projected	FY 23-24 Target
 Result	Overall election cost per eligible voter.	\$1.94	NA	\$1.38	\$1.26
 Result	Election personnel cost per 1,000 ballots processed.	\$2,872	NA	\$630	\$550
 Result	% Elections open to observation	100%	100%	100%	NA
 Result	% Ballot correspondence sent to voter within two business days	100%	Unknown	Unknown	NA
 Result	% Election filings on the County's website within one business day	100%	Unknown	Unknown	NA

*The program applies new measures moving into FY23-24.

Program includes:

Mandated Services

Shared Services

Grant Funding

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



	FY20-21 Actuals	FY21-22 Actuals	FY22-23 Amended Budget	FY22-23 Projected Year- End	FY23-24 Budget	Change from Prior Yr Budget	% Change from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Taxes	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts & Donations	150,000	-	-	20,000	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	-	-	-	-	-	-	-
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-
All Other Revenue Resources	168,870	412,751	250,000	225,000	350,000	100,000	40%
Other Interfund Transfers	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-
Operating Revenue	318,870	412,751	250,000	245,000	350,000	100,000	40%
Total Revenue	318,870	412,751	250,000	245,000	350,000	100,000	40%
Personnel Services	-	336,416	585,425	475,688	624,154	38,729	7%
Materials and Services	862,640	620,581	889,390	866,486	944,849	55,459	6%
Capital Outlay	-	-	-	-	600,000	600,000	-
Operating Expense	862,640	956,997	1,474,815	1,342,174	2,169,003	694,188	47%
Debt Service	-	-	-	-	-	-	-
Special Payments	157,343	173,304	220,000	190,000	240,000	20,000	9%
Transfers	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-
Total Expense	1,019,982	1,130,301	1,694,815	1,532,174	2,409,003	714,188	42%
Revenues Less Expenses	(701,113)	(717,550)	(1,444,815)	(1,287,174)	(2,059,003)		

Notes:
None.



County Clerk

Recording




Purpose Statement

The purpose of the Recording program is to provide marriage license, real property records access, and document recording services to the public so they can effectively research records, record documents, and obtain marriage licenses.

Performance Narrative Statement

The Recording program proposed a \$739,309 budget, a slight increase of current funding levels. These resources will provide the public access so they can receive marriage licenses, have weddings officiated; and certify ownerships, interest, and definitions of property within Clackamas County.

Key Performance Measures

		FY 21-22 Actual	FY 22-23 Target	FY22-23 Projected	FY 23-24 Target
 Result	% Recorded documents returned within 10 business days	80%	100%	100%	100%
 Result	% Requests for certified documents fulfilled within two business days of request	80%	100%	90%	100%
 Result	% Recorded documents indexed within five business days of being recorded	not tracked	NA	not tracked	75%

Program includes:

Mandated Services Y/N

Shared Services Y/N

Grant Funding Y/N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation



	FY20-21 Actuals	FY21-22 Actuals	FY22-23 Amended Budget	FY22-23 Projected Year- End	FY23-24 Budget	Change from Prior Yr Budget	% Change from Prior Yr Budget
Beginning Fund Balance	197,098	391,460	143,108	247,353	358,718	215,610	151%
Taxes	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts & Donations	-	1,628	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	389,203	319,175	200,000	111,365	144,776	(55,224)	-28%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-
All Other Revenue Resources	-	121	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-
Operating Revenue	389,203	320,924	200,000	111,365	144,776	(55,224)	-28%
Total Revenue	586,301	712,384	343,108	358,718	503,494	160,386	47%
Personnel Services	104,809	150,150	556,020	515,895	557,309	1,289	0%
Materials and Services	87,107	115,046	228,094	131,594	182,000	(46,094)	-20%
Capital Outlay	2,925	4,690	8,000	-	-	(8,000)	-100%
Operating Expense	194,841	269,887	792,114	647,489	739,309	(52,805)	-7%
Debt Service	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-
Total Expense	194,841	269,887	792,114	647,489	739,309	(52,805)	-7%
Revenues Less Expenses	391,460	442,497	(449,006)	(288,771)	(235,815)		

Notes:
None.



County Clerk

Records Management

Purpose Statement

The purpose of the Records Management program is to provide custodial storage, preservation, and access services internally to County Departments so they can have confidence that their records are secure, preserved, easily accessed, and retained in compliance with Oregon State rules and laws.

Performance Narrative Statement

Records Management proposed a \$723,896 budget to provide custodial storage, preservation, and archiving of County records to insure compliance with Oregon State rules and laws. The resources serve departments and the public concerning County records. The Passport Services program is to provide complete passport application services to the public so they can request a US Passport from the US Department of State.

Key Performance Measures

		FY 20-21 Actuals	FY 21-22 Actual	FY 22-23 Target	FY 22-23 Projected	FY 23-24 Target
	Result	% Permanent, hardcopy documents stored in Records Management will be converted to archival film (target 100% by 2023)		100%	100%	100%
	Result	% Department Records Requests delivered within one business day		100%	100%	100%
	Result	% Records destruction lists signed and returned within 30 calendar days of issuance (target 50% by 2023)		50%	50%	50%

Shared Services Y/N

Grant Funding Y/N

Explain all "Yes" boxes below

For help with shared services, see AOC Shared State-County Services page on intranet

If grant funding, include length of grant and any match requirement (w/funding source)

Explanation Oregon State Rules and Laws require that any records with a retention of over 99 years be converted to archival microfilm per ORS Chapter 166.



130106-Records Management
 BCC Priority Alignment: Accountable Government
 Budget Summary

	FY20-21 Actuals	FY21-22 Actuals	FY22-23 Amended Budget	FY22-23 Projected Year- End	FY23-24 Budget	Change from Prior Yr Budget	% Change from Prior Yr Budget
Beginning Fund Balance	170,977	-	-	-	-	-	-
Taxes	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts & Donations	5,812	1,900	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	443,109	518,591	829,970	710,830	704,829	(125,141)	-15%
Revenue from Bonds & Other Debts	-	-	-	-	-	-	-
All Other Revenue Resources	-	-	-	-	-	-	-
Other Interfund Transfers	-	-	-	-	-	-	-
General Fund Support	-	-	-	-	-	-	-
Operating Revenue	448,920	520,491	829,970	710,830	704,829	(125,141)	-15%
Total Revenue	619,898	520,491	829,970	710,830	704,829	(125,141)	-15%
Personnel Services	364,372	407,082	571,341	571,344	625,359	54,018	9%
Materials and Services	239,710	248,076	266,710	274,629	98,537	(168,173)	-63%
Capital Outlay	-	-	-	-	-	-	-
Operating Expense	604,083	655,158	838,051	845,973	723,896	(114,155)	-14%
Debt Service	-	-	-	-	-	-	-
Special Payments	-	-	-	-	-	-	-
Transfers	-	-	-	-	-	-	-
Reserve for Future Expenditures	-	-	-	-	-	-	-
Contingency	-	-	-	-	-	-	-
Unappropriated Ending Fund Balance	-	-	-	-	-	-	-
Total Expense	604,083	655,158	838,051	845,973	723,896	(114,155)	-14%
Revenues Less Expenses	15,815	(134,667)	(8,081)	(135,143)	(19,067)		

Notes:

Do to the increased demand for passports we have now increased our appointment schedule to up to 40 passports per day. This has made a welcome increase to Records Managements revenue.