



CLACKAMAS COUNTY CLERK
Performance Clackamas Strategic Plan
February 2020

MISSION STATEMENT:

The mission of the County Clerk is to provide elections, records management, licensing and recording, property tax appeals, and passport services to the public, County Departments and other government jurisdictions so they can participate in the electoral process, trust the integrity of the process, and promptly conduct their business in a welcoming environment.

ISSUE STATEMENTS:

- 1. Decreasing public trust in government and election systems, if not addressed will result in:**
 - Decreased public participation and representation in government
 - Increased susceptibility to misinformation
 - Increased voter agitation

- 2. Employee turnover, including retirements, within the Clerk's Office, coupled with the lack of succession plans, and expected loss of institutional knowledge if not addressed will result in:**
 - Loss of confidence in Clerk staff
 - Susceptibility to errors
 - Longer wait for services
 - Not keeping costs under control

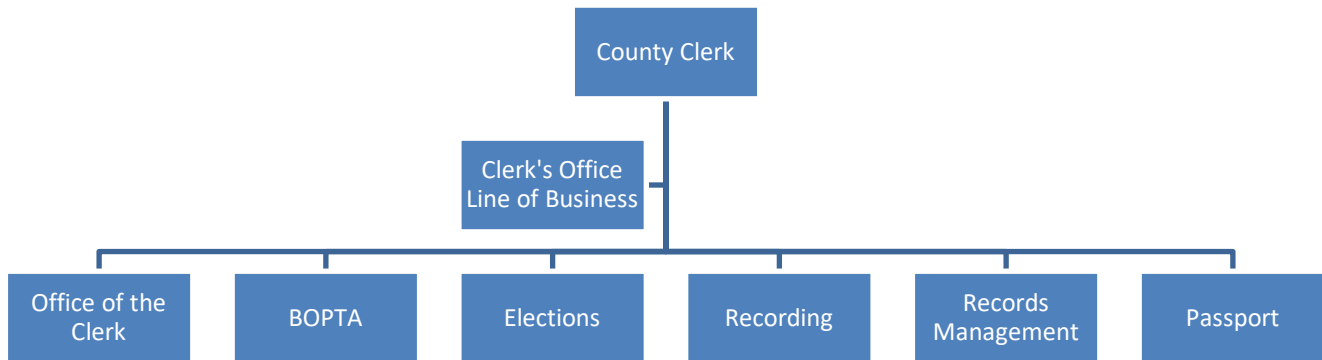
- 3. Continued lack of engagement with centralized, County-wide records management system, if not addressed will result in:**
 - Continued non-compliance with state and federal records laws
 - Continued inability to properly respond to public records requests
 - Allocated cost increases to participating departments and programs

STRATEGIC RESULTS:

- 1. By 2023, 100% County Departments will be in compliance with Oregon's records management rules and laws, as evidenced by: (Issue 3)**
 - 50% records destruction lists will be signed and returned within 30 days of issuance
 - 100% of County Departments will have a physical inventory of their records conducted
 - 100% permanent, hard copy documents stored in Records Management will be converted to archival film
 - 80% of County Departments understand our services and how to use them

- 2. County Clerk customers will receive efficient, consistent, and exceptional customer service, as evidenced by: (Issues 1, 2, 3)**
 - By 2022, 65% people surveyed will report they were satisfied with the level of service received
 - By 2021, 100% recorded documents will be indexed within five business days of being recorded

Department Structure



Line of Business: Clerk's Office

PROGRAMS: Office of the Clerk, Board of Property Tax Appeals (BOPTA), Elections, Recording, Records Management, Passport

The purpose of the Clerk's Office is to provide elections, records management, recording, property tax appeals, marriage and liquor licenses, and passport services to the public, County Departments and other government jurisdictions so they can promptly and efficiently conduct their business in a welcoming environment.

Key Results:

% recorded documents indexed within 5 business days of being recorded (target 100%)

% election filings on the County's website within one business day (target 100%)

% employees with annual performance summary

% BOPTA petitioners who receive a decision/order from the Clerk's office within five business days of their hearing

% Passport program customers report by survey the services were provided in a welcoming environment

% Permanent, hardcopy documents stored in Records Management will be converted to archival film (target 100% by 2023)

Programs

OFFICE OF THE CLERK

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.

Office of the Clerk Results:

% of County Clerk program results achieved

% people surveyed report they were satisfied with the level of service received (target 65%) (Strategic Result #2)

% employees with annual performance summary

Clerk Outputs:

employee performance summaries processed

Clerk Services:

- Customer inquiry responses
- Employee performance summaries processed
- Media Responses
- Office of The Clerk Budget
- Policy Decisions
- Public Presentations

BOPTA

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.

BOPTA Results:

% Petitioners who receive a decision/order from the Clerk's office within five business days of their hearing

BOPTA Outputs:

#BOPTA Hearings provided

#BOPTA Orders provided

BOPTA Services:

- BOPTA Hearing Notices
- BOPTA Orders
- BOPTA Process Consultations
- Late Filing Fee Appeal Hearings
- Personal Property Appeal Hearings
- Real Property Appeal Hearings

ELECTIONS

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.

Elections Results:

% Elections open to observation (target 100%)

% election filings on the County's website within one business day (target 100%)

% ballot correspondence sent to voter within two business days (target 100%)

Elections Outputs:

Ballots counted

Certificates of elections

Election observers

Petitions validated

Voter Notification Cards provided

Elections Demands:

N/A

Elections Efficiencies:

\$ Overall Election Cost per registered voter

\$ Election Personnel Cost per 1,000 ballots processed

Registered Voters/FTE

Elections Services:

- Annexation packet distributions
- Certificates of Election
- Certified Election Results
- Customer inquiry responses
- Drop sites
- Election Recounts
- Elections Cost Reports
- Electoral process consultations
- Jury Lists
- Lists of Current and Historical Filings, Measures, and Candidates
- Mailed ballot packets
- Petition Verifications
- Precinct Boundaries maps
- Public ballot title notifications
- Voter accessibility supports
- Voter Confirmation Cards
- Voter lists
- Voter Notification Cards
- Voter Pamphlets
- Voter Registration Cards

RECORDING

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.

Recording Results:

% recorded documents returned within ten business days

% requests for certified documents fulfilled within two business days of request

% recorded documents will be indexed within five business days of being recorded (target 100%)
(Strategic Result #2)

Recording Outputs:

Real Property Records recorded

Records Indexed

Recording Services:

- Board Of County Commissioners' records
- Certified and recorded document copies
- Customer inquiry responses
 - ✓ In person
 - ✓ By phone
 - ✓ By email
 - ✓ By mail
- Indexed records
- Marriage licenses and domestic partnership registrations
- Military discharge searched recordings
- Oregon liquor license applications – unincorporated Clackamas County
- Real property documents – recorded, indexed and returned

RECORDS MANAGEMENT

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.

Records Management Results:

% Permanent, hard copy documents stored in Records Management will be converted to archival film (target 100% by 2023) (Strategic Result #1)

% Department Records Requests delivered within one business day

% Records destruction lists signed and returned within 30 calendar days of issuance (target 50% by 2023) (Strategic Result #1)

% County Departments will have a physical inventory of their records conducted (target 100% by 2023) (Strategic Result #1)

% County Departments understand our services and how to use them (Strategic Result #1)

Records Management Outputs:

Archived Film Permanent Records provided

Digitized Documents produced

Records Pick-Ups And Deliveries provided

cubic feet of records storage

Records Management Services:

- Archived records
- Cost allocation reports
- Customer Inquiry Responses
- Department offsite records storage sites
- Department records destruction authorization notices
- Department Records Inventories
- Document conversions to archived permanent records
- Records deliveries and pickups
- Records management training sessions
- Records software trainings and inquiry responses

PASSPORT

The purpose of the Passport program is to provide passport application verification services to the public so they can apply for a US Passport from the US Department of State in a welcoming environment.

Passports Results:

% customers report by survey they were satisfied with the level of service provided

% customers report by survey the services were provided in a welcoming environment

Passports Output:

Passport Applications completed

Passports Services:

- Customer inquiry responses
- Passport application deliveries and delivery verifications
- Passport application verifications
- Passport applications
- Passport photos

MFR Glossary

To help participants and observers better understand this work program, definitions of a number of key words and phrases used throughout the process are listed below.

Customer: An individual or group of individuals whose best interests are served by, or who receives or uses, the services that the department delivers and who experiences the intended benefit.

Issues: A circumstance that will have a major impact on the customers served by the department.

Issue Statements: A statement that summarizes the issues and trends that will have a major impact on the customers served by the department over the next 2-5 years. The statement has two parts: 1) describes the issue or trend and how it is increasing, decreasing or continuing, and 2) describes how that trend, if the status quo continues unabated, is projected to impact customers and the department over the next 2-5 years.

Key Result Measures: A set of performance measures contained within each line of business comprised of one result measure from each of the programs in that line of business.

Lines of Business (LOB): A set of programs that have a common purpose or result. LOBs create the business profile of the department; they express in terms of broad result areas the particular mix of services that the organization is offering to the public in order to achieve its mission.

Managing for Results: An entire organization, its management system, its staff and the organizational culture (beliefs, behavior and language) are focused on achieving results for the customer.

Mission Statement: A clear, concise statement of purpose for the entire department, focused on the broad, yet distinct, results the department will achieve for its customers.

Performance Measures: A balanced "family of measures" that includes at least one of the following:
Result: measures the degree to which customers experience the expected benefit, as a consequence of having received the services that the department delivers.
Output: measures the amount of service provided or number of units produced or processed.
Demand: total units of a service expected to be demanded, requested or required by the customer.
Efficiency: expenditure/cost per output or result.

Program: A set of services that have a common purpose or result.

Program Purpose Statement: Clear, concise and results-oriented statement bringing together the name, the service provided the customer and the result customers are expected to experience.

Services: Tangible and intangible "things" or deliverables that the program provides to customers.

Strategic Result: The significant results the department must accomplish over the next 2-5 years to proactively respond to the critical trends, issues and challenges on the horizon.