



Department Mission

The mission of the County Clerk 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 participate in the electoral process, trust in the integrity of the processes, and promptly conduct their business in a welcoming environment.

County Clerk's Department

Sherry Hall - County Clerk
 FTE 19.00
 Total Proposed \$ 4,184,844
 General Fund Support \$ 0

| | |
|---|--|
| <p>County Clerk</p> <p>Sherry Hall Cty Clerk Total Proposed \$3,389,003 Gen Fund \$ 0</p> | <p>Records Management</p> <p>Carol Hopkins Mgr Total Proposed \$795,841 Gen Fund \$ 0</p> |
| <p>Office of the Clerk/BOPTA</p> <p>Sherry Hall Cty Clerk FTE 2.0 Total Proposed \$2,028,232 Gen Fund \$ 0</p> | <p>Records Management</p> <p>Carol Hopkins Mgr FTE 5.0 Total Proposed \$795,841 Gen Fund \$ 0</p> |
| <p>Elections</p> <p>Andrew Jones Mgr FTE 5.0 Total Proposed \$898,000 Gen Fund \$ 0</p> | |
| <p>Recording</p> <p>Cindy Swick Mgr FTE 7.0 Total Proposed \$462,771 Gen Fund \$ 0</p> | |



County Clerk




Office of the Clerk

Purpose Statement

Performance Narrative Statement

The Office of the Clerk program Proposed a budget of \$2,028,232 operating budget a continuation of current funding levels. These resources will support office materials and services, training, and admin costs of supporting elections, records management, property recording, property tax appeals, marriage and liquor licenses, and passport services to the general public.

Key Performance Measures

| | | FY 17-18 Actuals | FY 18-19 Actual | FY 19-20 Target | FY 19-20 Actuals | FY 20-21 Target |
|--|--------|---|--------------------|--------------------|---------------------|--------------------|
|  | Result | % of Office of the Clerk results achieved | | | | 60% |
|  | Result | % of customers surveyed report they were happy with the level of service received | | | | 65% |
|  | Result | % Employees with annual performance summary completed | | | | 100% |

*The program applies new measures from FY21.

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



Budget Summary

| | FY 17-18 Actual | FY 18-19 Actual | FY 19-20 Amended Budget | FY 19-20 Projected Year End | FY 20-21 Proposed Budget | Chg from Prior Yr Budget | % Chg from Prior Yr Budget |
|---|--------------------|------------------|-------------------------|-----------------------------|--------------------------|--------------------------|----------------------------|
| Beginning Balance | - | - | - | - | - | - | 0% |
| Charges for Service | 2,663,219 | 2,339,072 | 2,468,000 | 2,468,000 | 2,468,000 | - | 0% |
| Operating Revenue | 2,663,219 | 2,339,072 | 2,468,000 | 2,468,000 | 2,468,000 | - | 0% |
| Total Rev - Including Beginning Bal | 2,663,219 | 2,339,072 | 2,468,000 | 2,468,000 | 2,468,000 | - | 0% |
| Personnel Services | 1,236,300 | 1,244,957 | 1,368,938 | 1,360,262 | 1,514,508 | 145,570 | 10.6% |
| Materials & Services | 44,253 | 50,318 | 79,659 | 48,578 | 78,003 | (1,656) | -2.1% |
| Cost Allocation Charges | 485,086 | 451,162 | 434,482 | 434,482 | 435,721 | 1,239 | 0.3% |
| Capital Outlay | 133 | 12,376 | - | 3,092 | - | - | 0% |
| Operating Expenditure | 1,765,772 | 1,758,813 | 1,883,079 | 1,846,414 | 2,028,232 | 145,153 | 7.7% |
| Total Exp - Including Special Categories | 1,765,772 | 1,758,813 | 1,883,079 | 1,846,414 | 2,028,232 | 145,153 | 7.7% |
| General Fund Support (if applicable) | (1,030,363) | (245,275) | 172,581 | (461,003) | - | - | 0.0% |
| Full Time Equiv Pos (FTE) Budgeted | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | - | 0% |
| Full Time Equiv Pos (FTE) Filled at Yr End | 2.00 | 2.00 | - | 2.00 | - | - | - |
| Full Time Equiv Pos (FTE) Vacant at Yr End | - | - | - | - | - | - | - |

Significant Issues and Changes

All Clerk, Elections, and Recording FTE's funded out of Office of the Clerk Personnel Services line now. The increase (\$145k) is not so much an increase in that we swapped it out of the Recording Program budget.






Elections Program

Purpose Statement

Performance Narrative Statement

The Elections program Proposed a \$898,000 operating budget, a slight increase in funding levels due to the upcoming general election that includes the Presidential election. These resources will serve all registered voters of Clackamas County, candidates for elected office, those who file measures, and allowing local governments to hold elections.

Key Performance Measures

| | | FY 17-18 Actuals | FY 18-19 Actual | FY 19-20 Target | FY 19-20 Actuals | FY 20-21 Target |
|---|---|---------------------|--------------------|--------------------|---------------------|--------------------|
|  | Result % Elections open to observation | | | | | 100% |
|  | Result % Ballot correspondence sent to voter within two business days | | | | | 100% |
|  | Result % Election filings on the County's website within one business day | | | | | 100% |

**The program applies new measures from FY21.*

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



Budget Summary

| | FY 17-18 Actual | FY 18-19 Actual | FY 19-20 Amended Budget | FY 19-20 Projected Year End | FY 20-21 Proposed Budget | Chg from Prior Yr Budget | % Chg from Prior Yr Budget |
|---|--------------------|--------------------|-------------------------------|-----------------------------------|--------------------------------|--------------------------------|----------------------------------|
| Beginning Balance | - | - | - | - | - | - | 0% |
| Miscellaneous Revenue | 427,472 | 194,916 | 285,000 | 394,851 | 285,000 | - | 0% |
| Operating Revenue | 427,472 | 194,916 | 285,000 | 394,851 | 285,000 | - | 0% |
| Total Rev - Including Beginning Bal | 427,472 | 194,916 | 285,000 | 394,851 | 285,000 | - | 0% |
| Personnel Services | - | - | - | - | - | - | 0% |
| Materials & Services | 638,723 | 829,454 | 891,100 | 783,618 | 898,000 | 6,900 | 0.8% |
| Indirect Costs (Internal Dept Chgs) | - | - | - | - | - | - | 0% |
| Cost Allocation Charges | - | - | - | - | - | - | 0% |
| Capital Outlay | - | 12,746 | - | - | - | - | 0% |
| Operating Expenditure | 638,723 | 842,200 | 891,100 | 783,618 | 898,000 | 6,900 | 0.8% |
| Total Exp - Including Special Categories | 638,723 | 842,200 | 891,100 | 783,618 | 898,000 | 6,900 | 0.8% |
| General Fund Support (if applicable) | - | - | - | - | - | - | 0.0% |
| Full Time Equiv Pos (FTE) Budgeted | 6.00 | 6.00 | 5.00 | 5.00 | 5.00 | - | 0% |
| Full Time Equiv Pos (FTE) Filled at Yr End | 6.00 | 6.00 | - | 4.00 | - | - | - |
| Full Time Equiv Pos (FTE) Vacant at Yr End | - | - | - | 1.00 | - | - | - |

Significant Issues and Changes



County Clerk




Recording Program

Purpose Statement

Performance Narrative Statement

The Recording program Proposed a \$462,771 operating budget, a continuation of current funding levels. These resources will provide the public access so they can receive marriage licenses, certify ownerships, interest, and definitions of property within Clackamas County.

Key Performance Measures

| | | FY 17-18 Actuals | FY 18-19 Actual | FY 19-20 Target | FY 19-20 Actuals | FY 20-21 Target |
|--|--|---------------------|--------------------|--------------------|---------------------|--------------------|
|  Result | % Recorded documents returned within 10 business days | | | | | 80% |
|  Result | % Requests for certified documents fulfilled within two business days of request | | | | | 80% |
|  Result | % Recorded documents indexed within five business days of being recorded | | | | | 100% |

*The program applies new measures from FY21.

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



Budget Summary

| | FY 17-18 Actual | FY 18-19 Actual | FY 19-20 Amended Budget | FY 19-20 Projected Year End | FY 20-21 Proposed Budget | Chg from Prior Yr Budget | % Chg from Prior Yr Budget |
|---|--------------------|--------------------|-------------------------------|-----------------------------------|--------------------------------|--------------------------------|----------------------------------|
| Beginning Balance | 334,217 | 344,764 | 323,222 | 323,222 | 461,003 | 137,781 | 42.6% |
| Charges for Service | 243,332 | 212,475 | 175,000 | 175,000 | 175,000 | - | 0% |
| Miscellaneous Revenue | (80) | 75 | - | (36) | - | - | 0% |
| Operating Revenue | 243,252 | 212,550 | 175,000 | 174,964 | 175,000 | - | 0% |
| Total Rev - Including Beginning Bal | 577,469 | 557,314 | 498,222 | 498,186 | 636,003 | 137,781 | 27.7% |
| Personnel Services | 111,492 | 130,987 | 129,432 | 129,432 | - | (129,432) | -100.0% |
| Materials & Services | 121,810 | 112,627 | 188,970 | 140,670 | 191,411 | 2,441 | 1.3% |
| Capital Outlay | - | - | 8,000 | - | 8,000 | - | 0% |
| Operating Expenditure | 233,302 | 243,614 | 326,402 | 270,102 | 199,411 | (126,991) | -38.9% |
| Reserve for Future Expenditures | - | - | 323,222 | - | 263,360 | (59,862) | -18.5% |
| Total Exp - Including Special Categories | 233,302 | 243,614 | 649,624 | 270,102 | 462,771 | (186,853) | -28.8% |
| General Fund Support (if applicable) | - | - | - | - | - | - | 0.0% |
| Full Time Equiv Pos (FTE) Budgeted | 7.00 | 7.00 | 7.00 | 7.00 | 7.00 | - | 0% |
| Full Time Equiv Pos (FTE) Filled at Yr End | 7.00 | 7.00 | - | 6.00 | - | - | - |
| Full Time Equiv Pos (FTE) Vacant at Yr End | - | - | - | 1.00 | - | - | - |

Significant Issues and Changes

We currently have no Recording manager due to a recent retirement. We are testing having the Records Management manager oversee the Recording department while we search for a new Recording Manager, this should afford us some cost savings to Records Management as we temporarily fund that cost allocated position from what would have funded the Recording Manager's position. This will affect actual figures in Personnel for Records Management next year.



Records Management




Records Management Program

Purpose Statement

Performance Narrative Statement

Records Management Proposed a \$795,841 operating 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 17-18 Actuals | FY 18-19 Actual | FY 19-20 Target | FY 19-20 Actuals | FY 20-21 Target |
|--|---|---------------------|--------------------|--------------------|---------------------|--------------------|
|  Result | % Permanent, hardcopy documents stored in Records Management will be converted to archival film (target 100% by 2023) | | | | | 100% |
|  Result | % Department Records Requests delivered within one business day | | | | | 100% |
|  Result | % Records destruction lists signed and returned within 30 calendar days of issuance (target 50% by 2023) | | | | | 50% |

*The program applies new measures from FY21.

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.



Records Management

Records Management Program

Budget Summary

| | FY 17-18 Actual | FY 18-19 Actual | FY 19-20 Amended Budget | FY 19-20 Projected Year End | FY 20-21 Proposed Budget | Chg from Prior Yr Budget | % Chg from Prior Yr Budget |
|---|----------------------------|----------------------------|--|--|---|---|---|
| Beginning Balance | 105,746 | 173,401 | 157,935 | 206,602 | 130,664 | (27,271) | -17.3% |
| Charges for Service | 672,180 | 702,819 | 640,177 | 645,603 | 665,177 | 25,000 | 3.9% |
| Operating Revenue | 672,180 | 702,819 | 640,177 | 645,603 | 665,177 | 25,000 | 3.9% |
| Total Rev - Including Beginning Bal | 777,926 | 876,220 | 798,112 | 852,205 | 795,841 | (2,271) | -0.3% |
| Personnel Services | 371,575 | 426,960 | 472,091 | 445,699 | 515,633 | 43,542 | 9.2% |
| Materials & Services | 91,250 | 105,732 | 111,998 | 98,489 | 97,395 | (14,603) | -13.0% |
| Cost Allocation Charges | 141,699 | 136,926 | 177,353 | 177,353 | 182,813 | 5,460 | 3.1% |
| Operating Expenditure | 604,524 | 669,618 | 761,442 | 721,541 | 795,841 | 34,399 | 4.5% |
| Contingency | - | - | 36,670 | - | - | - | 0% |
| Total Exp - Including Special Categories | 604,524 | 669,618 | 798,112 | 721,541 | 795,841 | 34,399 | -0.3% |
| General Fund Support (if applicable) | - | - | - | - | - | - | 0% |
| Full Time Equiv Pos (FTE) Budgeted | 5.00 | 5.00 | 5.00 | 5.00 | 5.00 | - | 0% |
| Full Time Equiv Pos (FTE) Filled at Yr End | 4.00 | 5.00 | | 5.00 | | | |
| Full Time Equiv Pos (FTE) Vacant at Yr End | 1.00 | - | - | - | - | | |

Significant Issues and Changes

We currently have no Recording manager due to a recent retirement. We are testing having the Records Management manager oversee the Recording department while we search for a new Recording Manager, this should afford us some cost savings to Records Management as we temporarily fund that cost allocated position from what would have funded the Recording Manager's position. This will affect actual figures in Personnel for Records Management next year.