



## **Clerk**

**Sherry Hall, County Clerk**

**1710 Red Soils Ct**

**Suite 100**

**Oregon City, Oregon 97045**

**503-655-8698**

Website Address: <http://www.clackamas.us/clerk/>



**Department Mission**

The mission of the County Clerk is to provide elections, records management, property recording, property tax appeals, marriage and liquor licenses, and passport services to the general public, County departments and other government jurisdictions so they can exercise their right to vote, trust in the integrity of the process, and promptly conduct their business in a welcoming environment.

<h2 style="margin: 0;">County Clerk's Department</h2> <p style="margin: 0;">Sherry Hall - County Clerk FTE 19.00 Total Request \$ 4,219,003 General Fund Support \$169,669</p>
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<p><b>Office of the Clerk &amp; BOPTA</b></p> <p>Sherry Hall Cty Clerk Total Request \$3,420,891</p>
<p>Gen Fund \$ 169,669</p>

<p><b>Records Management</b></p> <p>Carol Hopkins Mgr Total Request \$798,112</p>
<p>Gen Fund \$ 0</p>

<p><b>Office of the Clerk/BOPTA</b></p> <p>Sherry Hall Cty Clerk FTE 2.0 Total Request \$1,880,267</p>
<p>Gen Fund \$ 169,669</p>

<p><b>Records Management</b></p> <p>Carol Hopkins Mgr FTE 5.0 Total Request \$798,112</p>
<p>Gen Fund \$ 0</p>

<p><b>Elections</b></p> <p>Andrew Jones Mgr FTE 5.0 Total Request \$891,000</p>
<p>Gen Fund \$ 0</p>

<p><b>Recording</b></p> <p>Cindy Swick Mgr FTE 7.0 Total Request \$649,624</p>
<p>Gen Fund \$ 0</p>

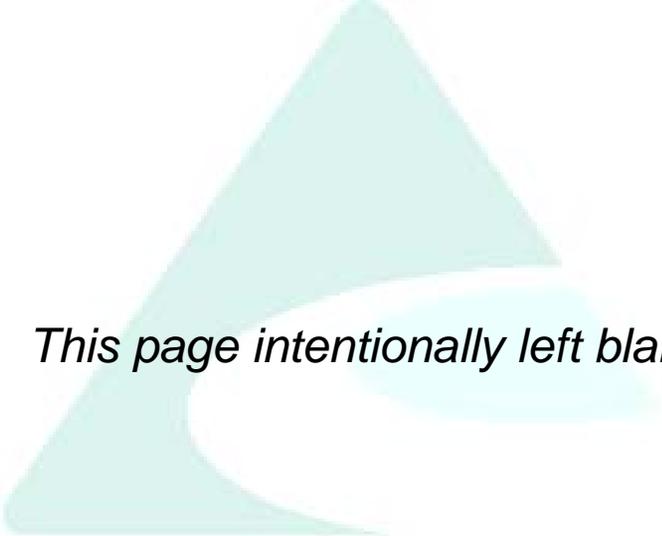


County Clerk Department

Department Budget Summary by Fund

<i>Line of Business</i>	FY 19/20	FY 19/20	FY 19/20		FY 19/20
<i>Program</i>	FTE	General Fund	Records Management Fund	Total Proposed Budget	General Fund Subsidy Included in Proposed Budget**
County Clerk					
Office of the Clerk	2.0	1,880,267		1,880,267	169,669
Elections	5.0	891,000		891,000	-
Recording	7.0	649,624		649,624	-
				-	
Records Management				-	
Records Management	5.0		798,112	798,112	
				-	
<b>TOTAL</b>	<b>19.0</b>	<b>3,420,891</b>	<b>798,112</b>	<b>4,219,003</b>	<b>169,669</b>
<b>FY 18/19 Budget</b>	19.0	3,421,045	858,509	4,279,554	(106,725)
<b>\$ Increase (Decrease)</b>	0.0	(154)	(60,397)	(60,551)	276,394
<b>% Increase (Decrease)</b>	0.0	-0.005%	-7.035%	-1.41%	258.98%

\*\* General Fund subsidy is support from unrestricted General Fund revenues, primarily property tax  
Recording Fees are accounted for in the Clerk's organization of the General Fund. These revenues generate more than the amount required to support the Clerk's operations in the General Fund. The excess revenue is available for other General Fund uses.



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**CLACKAMAS**  
C O U N T Y



County Clerk Purpose Statement

The purpose of the Office of the Clerk is to provide leadership and policy services to the department so our members can professionally and effectively serve the public and other government agencies. The purpose of the Clackamas County Board of Property Tax Appeals 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.

<b>Clerk Department</b> Sherry Hall - County Clerk FTE 19.00 Total Request \$ 4,219,003 <b>General Fund Support \$169,669</b>
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<b>County Clerk</b> <b>Sherry Hall</b> Total Request \$3,420,891 <b>Gen Fund \$ 169,669</b>
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<b>Office of the Clerk/BOPTA</b> Sherry Hall Cty Clerk FTE 2.0 Total Request \$1,880,267 <b>Gen Fund \$ 169,669</b>
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<b>Elections</b> Andrew Jones Mgr FTE 5.0 Total Request \$891,000 <b>Gen Fund \$ 0</b>
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<b>Recording</b> Cindy Swick Mgr FTE 7.0 Total Request \$649,624 <b>Gen Fund \$ 0</b>
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# County Clerk's Office

Office of the Clerk

## Purpose Statement

### Performance Narrative Statement

The Office of the Clerk program proposes a budget of \$1,880,267 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 16-17 Actuals	FY 17-18 Actual	FY 18-19 Target*	FY 18-19 Actuals as of 12/31/2018	FY 19-20 Target
	Result	% of Office of the Clerk results achieved	100%	100%	100%	100%
	Result	% of Petitioners whose appeal is heard by BOPTA	100%	100%	100%	100%
	Result	% Petitioners who receive a decision from the Clerk's office within five business days of their hearing	100%	100%	100%	100%

\*FY 18-19 property tax appeals are currently in progress

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 16-17 Actual	FY 17-18 Actual	FY 18-19 Amended Budget	FY 18-19 Projected Year End	FY 19-20 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>	-	-	-	-	-	-	0%
Charges for Service	3,039,968	2,663,219	2,708,006	2,305,904	2,468,000	(240,006)	-8.9%
<b>Operating Revenue</b>	<b>3,039,968</b>	<b>2,663,219</b>	<b>2,708,006</b>	<b>2,305,904</b>	<b>2,468,000</b>	<b>(240,006)</b>	<b>-8.9%</b>
<b>Total Rev - Including Beginning Bal</b>	<b>3,039,968</b>	<b>2,663,219</b>	<b>2,708,006</b>	<b>2,305,904</b>	<b>2,468,000</b>	<b>(240,006)</b>	<b>-8.9%</b>
Personnel Services	1,196,959	1,236,300	1,376,838	1,354,605	1,366,026	(10,812)	-0.8%
Materials & Services	60,971	44,253	79,131	59,839	79,759	628	0.8%
Cost Allocation Charges	328,147	485,086	451,162	451,162	434,482	(16,680)	-3.7%
Capital Outlay	17,105	133	-	-	-	-	0%
<b>Operating Expenditure</b>	<b>1,603,182</b>	<b>1,765,772</b>	<b>1,907,131</b>	<b>1,865,606</b>	<b>1,880,267</b>	<b>(26,864)</b>	<b>-1.4%</b>
<b>Total Exp - Including Special Categories</b>	<b>1,603,182</b>	<b>1,765,772</b>	<b>1,907,131</b>	<b>1,865,606</b>	<b>1,880,267</b>	<b>(26,864)</b>	<b>-1.4%</b>
<b>General Fund Support (if applicable)</b>	<b>(1,424,365)</b>	<b>(1,030,363)</b>	<b>(106,725)</b>	<b>(76,459)</b>	<b>169,669</b>	<b>276,394</b>	<b>259.0%</b>
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**

We fund all of our FTE's out of Clerk Program 00 except for 1.5 FTE's that are funded out of the Recording program so that Clerk specific fees that can only be used toward Recording functions partly fund 50% of three full time positions.



# County Clerk's Office

## Elections Program

### Purpose Statement

### Performance Narrative Statement

The Elections program proposes a \$891,000 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 16/17 Actual	FY 17-18 Actual	FY 18-19 Target	FY 18-19 Actual as of 12/31/2018	FY 19/20 Target
Result	Personnel cost per 1,000 ballots cast	*No data	\$ 56.62	\$ 61.38	Pending May Election	\$ 60.00
Result	Ballot correspondence sent to voters within 2 days (started tracking in 2018)	*No data	95.6% <=2.0	69.9% <=2.0	Pending May Election	

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 16-17 Actual	FY 17-18 Actual	FY 18-19 Amended Budget	FY 18-19 Projected Year End	FY 19-20 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>	-	-	-	-	-	-	0%
Miscellaneous Revenue	331,320	427,472	225,000	225,000	285,000	60,000	26.7%
<b>Operating Revenue</b>	<b>331,320</b>	<b>427,472</b>	<b>225,000</b>	<b>225,000</b>	<b>285,000</b>	<b>60,000</b>	<b>26.7%</b>
<b>Total Rev - Including Beginning Bal</b>	<b>331,320</b>	<b>427,472</b>	<b>225,000</b>	<b>225,000</b>	<b>285,000</b>	<b>60,000</b>	<b>26.7%</b>
Materials & Services	677,619	638,723	874,350	887,666	891,000	16,650	1.9%
<b>Operating Expenditure</b>	<b>677,619</b>	<b>638,723</b>	<b>874,350</b>	<b>887,666</b>	<b>891,000</b>	<b>16,650</b>	<b>1.9%</b>
<b>Total Exp - Including Special Categories</b>	<b>677,619</b>	<b>638,723</b>	<b>874,350</b>	<b>887,666</b>	<b>891,000</b>	<b>16,650</b>	<b>1.9%</b>
<b>General Fund Support (if applicable)</b>	-	-	-	-	-	-	0.0%
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	5.00	5.00	-	5.00	-		
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	-	-		

**Significant Issues and Changes**



**Purpose Statement**

**Performance Narrative Statement**

The Recording program proposes a \$649,624 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 16-17 Actual	FY 17-18 Actual	FY 18-19 Target	FY 18-19 Actuals as of 12/31/2018	FY 19-20 Target
Result	% Customers who find the recorded records they are looking for	*No data	98%	100%	Pending	100%
Result	% Recordable documents are recorded on the same day they are received	*No data	97%	100%	Pending	100%
Result	Requests for certified documents fulfilled within 1 days	*No data	99%	100%	Pending	100%

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



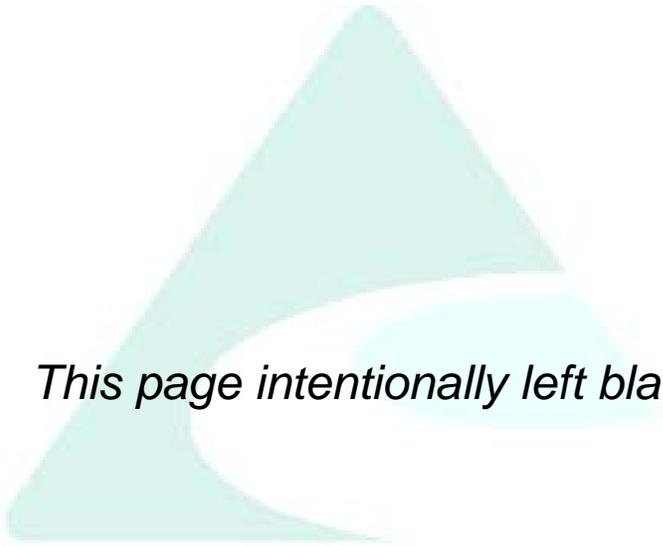
Budget Summary

	FY 16-17 Actual	FY 17-18 Actual	FY 18-19 Amended Budget	FY 18-19 Projected Year End	FY 19-20 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>	<b>497,600</b>	<b>334,217</b>	<b>344,764</b>	<b>344,764</b>	<b>323,222</b>	<b>(21,542)</b>	<b>-6.2%</b>
Charges for Service	267,099	243,332	250,000	225,000	175,000	(75,000)	-30.0%
Miscellaneous Revenue	(337)	(80)	-	-	-	-	0%
<b>Operating Revenue</b>	<b>266,762</b>	<b>243,252</b>	<b>250,000</b>	<b>225,000</b>	<b>175,000</b>	<b>(75,000)</b>	<b>-30.0%</b>
<b>Total Rev - Including Beginning Bal</b>	<b>764,362</b>	<b>577,469</b>	<b>594,764</b>	<b>569,764</b>	<b>498,222</b>	<b>(96,542)</b>	<b>-16.2%</b>
Personnel Services	102,117	111,492	100,000	122,233	129,432	29,432	29.4%
Materials & Services	161,307	121,810	186,800	136,278	188,970	2,170	1.2%
Capital Outlay	167,059	-	8,000	12,426	8,000	-	0%
<b>Operating Expenditure</b>	<b>430,483</b>	<b>233,302</b>	<b>294,800</b>	<b>270,937</b>	<b>326,402</b>	<b>31,602</b>	<b>10.7%</b>
Reserve for Future Expenditures	-	-	344,764	-	323,222	(21,542)	-6.2%
<b>Total Exp - Including Special Categories</b>	<b>430,483</b>	<b>233,302</b>	<b>639,564</b>	<b>270,937</b>	<b>649,624</b>	<b>10,060</b>	<b>1.6%</b>
<b>General Fund Support (if applicable)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0.0%</b>
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	-	4.00	-	-	
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	3.00	-	-	

**Significant Issues and Changes**

Recording gains revenue based off of recorded documents, the majority of these being from property sales. In FY 18-19 we experienced a significant downturn in sales in the market that directly affected the Recording revenue projections. Market analysis is showing that the market has stabilized and we should have more recorded documents for properties in 2019.

Note: With reduction in number of pages being recorded revenue has decreased due to regulated fee charges set by the state.



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**CLACKAMAS**  
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# County Clerk's Office: Records Management

## Records Management Purpose Statement

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

### Clerk Department

Sherry Hall - County Clerk

FTE 19.00

Total Request \$ 4,219,003

General Fund Support \$169,669

#### Records Mangement

Carol Hopkins Mgr

Total Request

\$798,112

Gen Fund \$

#### Records

Carol Hopkins Mgr

FTE 5.0

Total Request

\$798,112

Gen Fund \$



# County Clerk's Office

## Records Management Program

### Purpose Statement

### Performance Narrative Statement

Records Management proposes a \$798,112 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 16-17 Actual	FY 17-18 Actual	FY 18-19 Target	FY 18-19 Actuals as of 12/31/2018	FY 19-20 Target
	Zero unauthorized access to records	*No data	100%	100%	Pending	100%
	Department rush Records Requests delivered within one hour or less	*No data	100%	100%	Pending	100%
	Records will be destroyed within 30 days of appearing on the Destruct List	*No data	60%	80%	Pending	80%
	Applicants their passport within the stipulated time frame	*No data	95%	98%	Pending	98%

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.



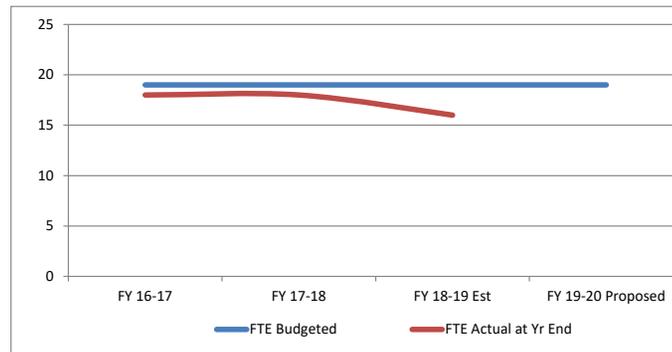
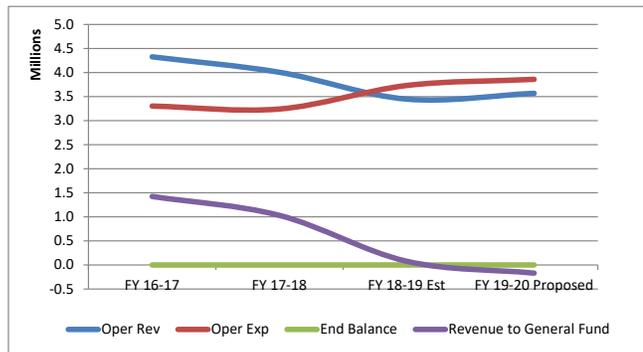
Budget Summary

	FY 16-17 Actual	FY 17-18 Actual	FY 18-19 Amended Budget	FY 18-19 Projected Year End	FY 19-20 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>	<b>8,664</b>	<b>105,746</b>	<b>173,401</b>	<b>173,401</b>	<b>157,935</b>	<b>(15,466)</b>	<b>-8.9%</b>
Charges for Service	689,019	672,180	685,108	691,622	640,177	(44,931)	-6.6%
<b>Operating Revenue</b>	<b>689,019</b>	<b>672,180</b>	<b>685,108</b>	<b>691,622</b>	<b>640,177</b>	<b>(44,931)</b>	<b>-6.6%</b>
<b>Total Rev - Including Beginning Bal</b>	<b>697,683</b>	<b>777,926</b>	<b>858,509</b>	<b>865,023</b>	<b>798,112</b>	<b>(60,397)</b>	<b>-7.0%</b>
Personnel Services	387,221	371,575	458,095	458,105	472,091	13,996	3.1%
Materials & Services	86,681	91,250	112,483	112,057	111,998	(485)	-0.4%
Cost Allocation Charges	118,034	141,699	136,926	136,926	177,353	40,427	29.5%
<b>Operating Expenditure</b>	<b>591,936</b>	<b>604,524</b>	<b>707,504</b>	<b>707,088</b>	<b>761,442</b>	<b>53,938</b>	<b>7.6%</b>
Contingency	-	-	151,005	-	36,670	-	0%
<b>Total Exp - Including Special Categories</b>	<b>591,936</b>	<b>604,524</b>	<b>858,509</b>	<b>707,088</b>	<b>798,112</b>	<b>53,938</b>	<b>-7.0%</b>
<b>General Fund Support (if applicable)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>
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	5.00	5.00	-	4.00	-	-	-
Full Time Equiv Pos (FTE) Vacant at Yr End	-	-	-	1.00	-	-	-

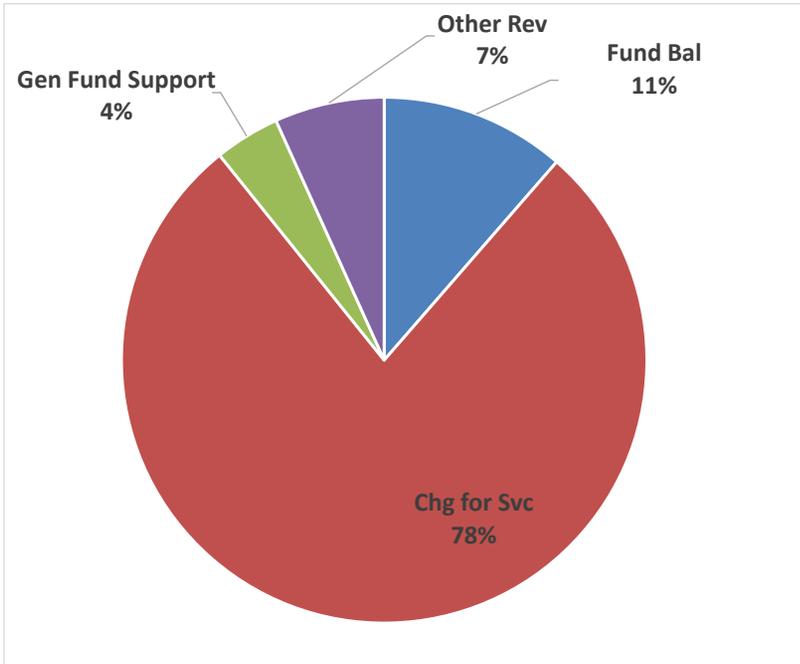
**Significant Issues and Changes**

**County Clerk Department  
Summary of Revenue and Expense**

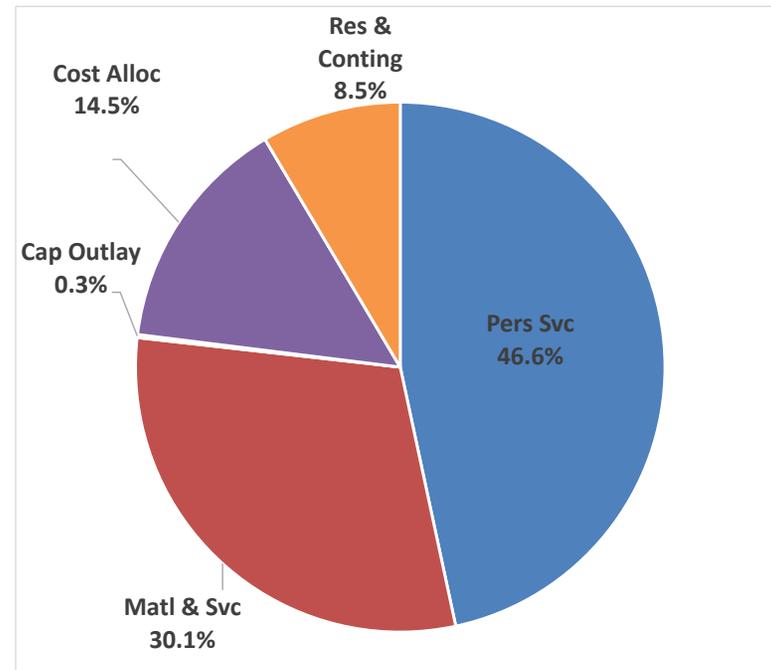
	FY 16-17	FY 17-18	FY 18-19 Amended Budgeted	FY 18-19 Projected Year End	FY 19-20 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>	<b>506,264</b>	<b>439,963</b>	<b>518,165</b>	<b>518,165</b>	<b>481,157</b>	<b>-37,008</b>	<b>-7.1%</b>
Prior Year Revenue	0	0	0	0	0	0	0%
Taxes	0	0	0	0	0	0	0%
Licenses & Permits	0	0	0	0	0	0	0%
Federal Grants & Revenues	0	0	0	0	0	0	0%
State Grants & Revenues	0	0	0	0	0	0	0%
Local Grants & Revenues	0	0	0	0	0	0	0%
Charges for Service	3,996,086	3,578,371	3,643,114	3,222,526	3,283,177	-359,937	-9.9%
Fines & Penalties	0	0	0	0	0	0	0%
Other Revenue	330,983	427,392	225,000	225,000	285,000	60,000	26.7%
Interfund Transfers	0	0	0	0	0	0	0%
<b>Operating Revenue</b>	<b>4,327,069</b>	<b>4,005,763</b>	<b>3,868,114</b>	<b>3,447,526</b>	<b>3,568,177</b>	<b>-299,937</b>	<b>-7.8%</b>
% Change	NA	-7.4%	-3.4%	-13.9%	3.5%		
Personnel Services	1,686,298	1,719,368	1,934,933	1,934,943	1,967,549	32,616	1.7%
Materials & Services	986,579	896,036	1,252,764	1,195,840	1,271,727	18,963	1.5%
Cost Allocation Charges	446,181	626,785	588,088	588,088	611,835	23,747	4.0%
Debt Service	0	0	0	0	0	0	0%
Interfund Transfers	0	0	0	0	0	0	0%
Capital Outlay	184,164	133	8,000	12,426	8,000	0	0%
<b>Operating Expenditure</b>	<b>3,303,222</b>	<b>3,242,322</b>	<b>3,783,785</b>	<b>3,731,297</b>	<b>3,859,111</b>	<b>75,326</b>	<b>2.0%</b>
% Change	NA	-1.8%	16.7%	15.1%	3.4%		
Reserve for Future Expenditures	0	0	344,764	0	323,222	-21,542	-6.2%
Contingency	0	0	151,005	0	36,670	-114,335	-75.7%
<b>Total Expenditure</b>	<b>3,303,222</b>	<b>3,242,322</b>	<b>4,279,554</b>	<b>3,731,297</b>	<b>4,219,003</b>	<b>-60,551</b>	<b>-1.4%</b>
<b>Ending Balance (if applicable)</b> (includes Reserve & Contingency)							<b>0%</b>
<b>Revenue provided to General Fund</b>	<b>1,424,365</b>	<b>1,030,363</b>	<b>106,725</b>	<b>76,459</b>	<b>-169,669</b>	<b>-276,394</b>	<b>-259.0%</b>
<b>General Fund Support Starting from FY 19-20</b>							
Full Time Equiv Positions (FTE) Budgeted	19.0	19.0	19.0		19.0	0.0	0%
Full Time Equiv Positions (FTE) Filled at Yr End	18.0	18.0		16.0			
Full Time Equiv Positions (FTE) Vacant at Yr End	1.0	1.0		3.0			



**County Clerk Department  
FY 19-20 Proposed Budget**



**Total Resources**



**Total Requirements**