



# County Clerk

## FY 22-23 BUDGET PRESENTATION



# 2021 Major Accomplishments

AREA	DESCRIPTION
Recording	Recorded documents remain high providing revenue not only to our office, but the County general fund as well.
	Continued to stay open and safe for citizens to conduct their business Recording important documents.
Elections	Upgrades to Elections equipment allowed elections to function at the highest level the past year
BOPTA	Completed the 2020/21 Property tax appeals hearings in person and via video conference for hundreds of property tax appeals, allowing citizens to contest their property values.

# Performance Clackamas

## Results Measures

Line of Business/Program	Results Measure		FY 20-21 Actual	FY 21-22 Target	FY 21-22 Projected Performance	FY 22-23 Target
Elections	Elections open to observation		100%	100%	100%	100%
	% Ballot correspondence sent to voter within two business days		100%	100%	100%	100%
Clerk	Employees with annual performance summary completed		90%	100%	100%	100%
BOPTA	% Petitioners who received a decision/order from the Clerk's office within five business days		100%	100%	100%	100%

# Program Profiles: FY 22-23 Summary

Line of Business/Program	Total Funds	% County General Funds	% Restricted Funds	Mandate: Fed/State/Cty /IGA/None	% Program Operated by County	Metrics: % Target Meet/Exceed or Improve
Office of the Clerk	\$1,104,100	0%	0%	Fed/State/County	100%	Meet
Board of Property Tax Appeals	\$12,000	0%	0%	State/County	100%	Meet
Elections	\$1,694,814	0%	0%	Fed/State	100%	Exceed
Recording/Passports	\$792,115	0%	20%	State/County	100%	Meet
Records Management	\$838,050	0%	0%	State/County	100%	Meet

# Department Summary by Fund

## County Clerk (13)



### Department Budget Summary by Fund

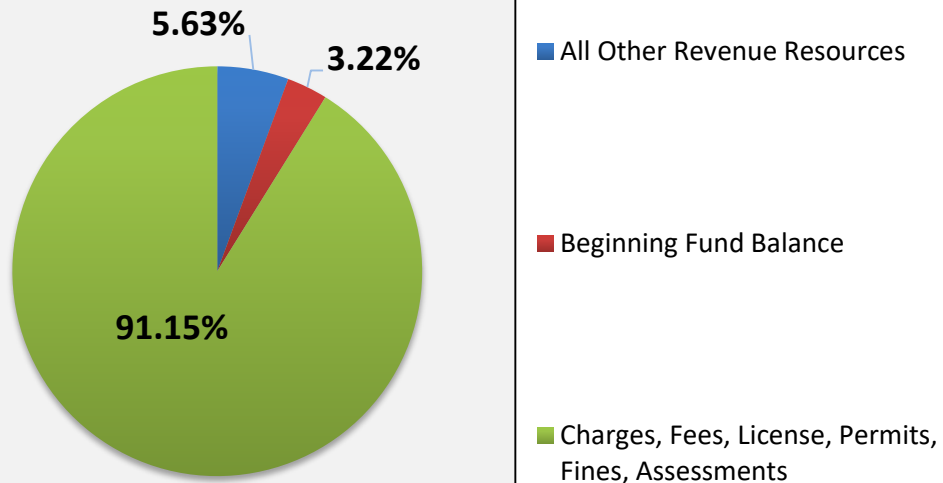
<i>Line of Business</i>		FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23
<i>Program</i>	<i>Prog#</i>	FTE	General Fund (100)	ARPA* (230)	Total Budget	General Fund Support in Budget**
Clerk's Office						
Office of the Clerk	130101	3.5	1,104,100		1,104,100	
Board of Property Tax Appeals	130102	0.0	12,000		12,000	
Elections	130103	5.0	1,694,814		1,694,814	
Recording	130105	5.5	792,115		792,115	
Records Management	130106	5.0	838,050		838,050	
<b>TOTAL</b>		19.0	4,441,078	-	4,441,078	
FY 21-22 Budget						
		19.0	4,652,350	13,907	4,666,257	
\$ Increase (Decrease)		0.0	(211,272)	(13,907)	(225,179)	
% Increase (Decrease)		0.0%	-4.5%	-100.0%	-4.8%	

\* FY21-22 ARPA funding of \$13,907 is shown in Personnel Services expense category.

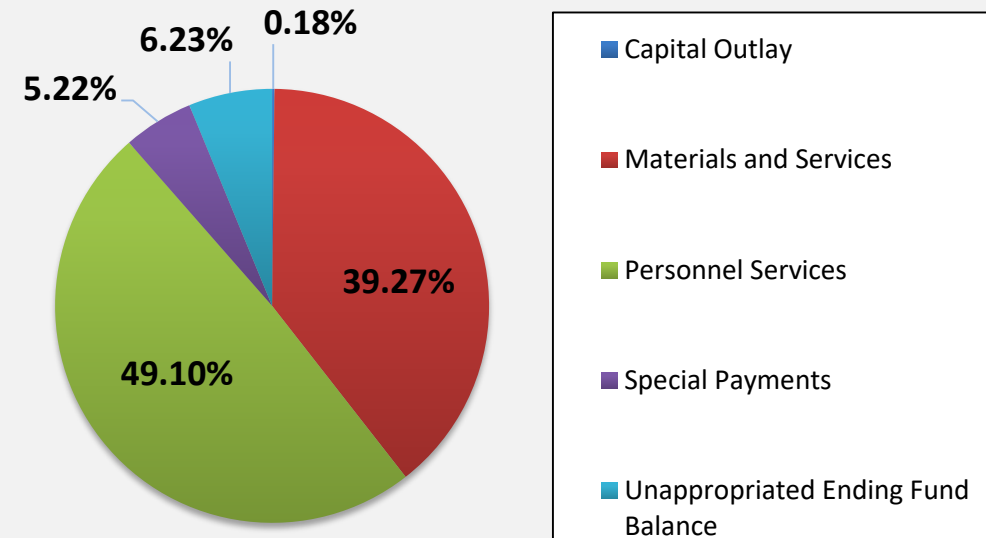
\*\* General Fund Support is the subsidy, net of any other revenue received by the department.

# FY 22-23 Revenue and Expenses

## Revenues



## Expenses





# Summary of Revenue & Expenses

## Clerk (13)

	FY 19-20 Actuals	FY 20-21 Actuals	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Fund Balance</b>	<b>451,877</b>	<b>368,076</b>	<b>461,003</b>	<b>391,460</b>	<b>143,108</b>	<b>(317,895)</b>	<b>-69%</b>
Federal, State, Local, All Other Gifts & Donations*	72,904	157,800	13,907	13,907	-	(13,907)	-100%
Charges, Fees, License, Permits, Fines, Assessments	4,307,737	5,630,101	3,941,347	3,884,390	4,047,970	106,623	3%
All Other Revenues	414,177	297,278	250,000	225,000	250,000	-	-
<b>Operating Revenue</b>	<b>4,794,818</b>	<b>6,085,179</b>	<b>4,205,254</b>	<b>4,123,297</b>	<b>4,297,970</b>	<b>92,716</b>	<b>2%</b>
<b>Total Revenue</b>	<b>5,246,695</b>	<b>6,453,255</b>	<b>4,666,257</b>	<b>4,514,757</b>	<b>4,441,078</b>	<b>(225,179)</b>	<b>-5%</b>
Personnel Services*	1,814,614	1,689,871	2,173,327	2,196,730	2,180,634	7,307	0%
Materials & Services	1,423,740	1,684,450	1,550,623	1,441,954	1,743,924	193,301	12%
Capital Outlay	3,092	2,925	8,000	4,690	8,000	-	-
<b>Operating Expense</b>	<b>3,241,446</b>	<b>3,377,246</b>	<b>3,731,950</b>	<b>3,643,374</b>	<b>3,932,558</b>	<b>200,608</b>	<b>5%</b>
Special Payments	77,964	161,426	252,000	98,500	232,000	(20,000)	-8%
Unappropriated Ending Fund Balance	-	-	682,307	-	276,520	(405,787)	-59%
<b>Total Expense</b>	<b>3,319,410</b>	<b>3,538,672</b>	<b>4,666,257</b>	<b>3,741,874</b>	<b>4,441,078</b>	<b>180,608</b>	<b>-5%</b>
Ending Fund Balance - Restricted	368,076	391,460		143,108			
<b>Revenues Less Expenses**</b>	<b>1,559,209</b>	<b>2,523,123</b>	<b>-</b>	<b>629,775</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Full Time Equiv Positions (FTE) Budgeted</b>	<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	<b>0.0</b>	<b>-</b>

\*FY21-22 ARPA funding of \$13,907 is shown in Personnel Services expense category.

\*\*General Fund Departments: Amounts in Revenue Less Expenses are moved into General Fund Non-Departmental at year-end.

# Significant Policy and/or Financial Issues

DESCRIPTION	IMPACT
Inflationary costs affecting our election vendors	Potential to significantly increase the materials and services budget.
Potential for changes in housing market	Potential to decrease Recording office revenue.



# End of Presentation

## County Clerk (13)



### Mission

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.

### County Clerk (13)

Sherry Hall - County Clerk

FTE 19.0

Total Budget \$ 4,441,078

Gen Fund: \$ -

#### Clerk's Office

Sherry Hall - County Clerk

FTE 19.0

Total Budget

\$4,441,078

Gen Fund \$ -

#### Office of the Clerk

Sherry Hall

FTE 3.5

Total Budget

\$1,104,100

Gen Fund \$ -

#### Board of Property Tax Appeals

Sherry Hall

FTE 0

Total Budget

\$12,000

Gen Fund \$ -

#### Elections

Vacant

FTE 5.0

Total Budget

\$1,694,814

Gen Fund \$ -

#### Recording

Vacant

FTE 5.5

Total Budget

\$792,115

Gen Fund \$ -

#### Records Management

Carol Hopkins Mgr

FTE 5.0

Total Budget

\$838,050

Gen Fund \$ -



## County Clerk (13)

### Department Budget Summary by Fund

<i>Line of Business</i>		FY 22-23	FY 22-23	FY 22-23	FY 22-23	FY 22-23
<i>Program</i>	<i>Prog#</i>	FTE	General Fund (100)	ARPA* (230)	Total Budget	General Fund Support in Budget**
Clerk's Office						
Office of the Clerk	130101	3.5	1,104,100		1,104,100	
Board of Property Tax Appeals	130102	0.0	12,000		12,000	
Elections	130103	5.0	1,694,814		1,694,814	
Recording	130105	5.5	792,115		792,115	
Records Management	130106	5.0	838,050		838,050	
<b>TOTAL</b>		19.0	4,441,078	-	4,441,078	
<b>FY 21-22 Budget</b>		19.0	4,652,350	13,907	4,666,257	
<b>\$ Increase (Decrease)</b>		0.0	(211,272)	(13,907)	(225,179)	
<b>% Increase ( Decrease)</b>		0.0%	-4.5%	-100.0%	-4.8%	

\* FY21-22 ARPA funding of \$13,907 is shown in Personnel Services expense category.

\*\* 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 has a \$1,104,100 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 18-19 Actuals	FY 19-20 Actuals	FY 20-21 Actuals	FY 21-22 Actuals	FY 22-23 Target
 Result	% of Office of the Clerk results achieved			33%	33%	60%
 Result	% of customers surveyed report they were happy with the level of service received			*withheld surveys due to pandemic	*withheld surveys due to pandemic	65%
 Result	% Employees with annual performance summary completed			90%	90%	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



County Clerk

Office of the Clerk

Budget Summary

	FY 19-20 Actual	FY20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Federal, State, Local, All Other Gifts & Donations	18,557	1,989	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	3,424,303	-	3,018,000	3,016,500	3,018,000	-	-
All Other Revenue Resources	(36)	-	-	-	-	-	-
<b>Operating Revenue</b>	<b>3,442,824</b>	<b>1,989</b>	<b>3,018,000</b>	<b>3,016,500</b>	<b>3,018,000</b>	<b>-</b>	<b>0%</b>
<b>Total Revenue</b>	<b>3,442,824</b>	<b>1,989</b>	<b>3,018,000</b>	<b>3,016,500</b>	<b>3,018,000</b>	<b>-</b>	<b>0%</b>
Personnel Services	1,127,408	1,989	722,111	714,514	467,850	(254,261)	-35%
Materials & Services	473,273	-	502,980	483,936	359,730	(143,250)	-28%
Capital Outlay	3,092	-	-	-	-	-	-
<b>Operating Expense</b>	<b>1,603,773</b>	<b>1,989</b>	<b>1,225,091</b>	<b>1,198,450</b>	<b>827,580</b>	<b>(397,511)</b>	<b>-32%</b>
Unappropriated Ending Fund Balance	-	-	682,307		276,520		
<b>Total Expense</b>	<b>1,603,773</b>	<b>1,989</b>	<b>1,907,398</b>	<b>1,198,450</b>	<b>1,104,100</b>	<b>(803,298)</b>	<b>-42%</b>
Year End Fund Balance - Unrestricted	-	-	-	629,775			-
<b>Revenues Less Expenses</b>	<b>1,839,051</b>	<b>-</b>	<b>1,110,602</b>	<b>1,188,275</b>	<b>1,913,900</b>	<b>803,298</b>	<b>72%</b>

Significant Issues and Changes



## 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 has a \$12,000.00 operating budget a continuation of current funding levels. These resources will support office materials and board members, training, and admin costs of reviewing property tax appeals and holding property tax appeals hearings.

#### Key Performance Measures

		FY 19-20 Actuals	FY 20-21 Actuals	FY 21-22 Targets	FY 21-22 Projected Performance	FY 22-23 Target
 Result	% Petitioners who received a decision/order from the Clerk's office within five business days	100%	100%	100%	100%	100%

*\*The program applies new measures from FY21.*

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 the Clerk program.
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County Clerk

Board of Property Tax Appeals

Budget Summary

	FY 19-20 Actual	FY20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Federal, State, Local, All Other Gifts & Donations	-		10,379	10,379	-	(10,379)	-100.0%
Charges, Fees, License, Permits, Fines, Assessments	-	4,797,789	-	-	-	-	-
All Other Revenue Resources	-	128,408	-	-	-	-	-
<b>Operating Revenue</b>	-	<b>4,926,197</b>	<b>10,379</b>	<b>10,379</b>	-	<b>(10,379)</b>	<b>-100.0%</b>
<b>Total Revenue</b>	-	<b>4,926,197</b>	<b>10,379</b>	<b>10,379</b>	-	<b>(10,379)</b>	<b>-100.0%</b>
Personnel Services	-	1,218,700	10,379	10,379		(10,379)	-100%
Materials & Services	-	494,993	-	-		-	-
<b>Operating Expense</b>	-	<b>1,713,693</b>	<b>10,379</b>	<b>10,379</b>	-	<b>(10,379)</b>	<b>-100%</b>
Special Payments	6,508	4,083	12,000	8,500	12,000		
<b>Total Expense</b>	<b>6,508</b>	<b>1,717,776</b>	<b>22,379</b>	<b>18,879</b>	<b>12,000</b>	<b>(10,379)</b>	<b>-46%</b>
<b>Revenues Less Expenses</b>	<b>(6,508)</b>	<b>3,208,421</b>	<b>(12,000)</b>	<b>(8,500)</b>	<b>(12,000)</b>	-	-

Significant Issues and Changes





## County Clerk

### Elections Program




#### Purpose Statement

The purpose of the Elections program is to provide voter registration, information, ballot delivery, ballot return drop sites,

#### Performance Narrative Statement

The Elections program has a \$1,694,814 operating budget, an increase in funding levels due to an upcoming state primary and the potential for several county wide recall elections. 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 19-20 Actuals	FY 20-21 Actuals	FY 21-22 Targets	FY 21-22 Projected Performance	FY 22-23 Target
 Result	% Elections open to observation	100%	100%	100%	100%	100%
 Result	% Ballot correspondence sent to voter within two business days	100%	100%	100%	100%	100%
 Result	% Election filings on the County's website within one business day			100%	100%	100%

*\*The program applies new measures from FY21.*

Program includes:

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



County Clerk

Elections

**Budget Summary**

	FY 19-20 Actual	FY20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Federal, State, Local, All Other Gifts & Donations	-	150,000	-	-	-	-	-
All Other Revenue Resources	414,213	168,870	250,000	225,000	250,000	-	-
<b>Operating Revenue</b>	<b>414,213</b>	<b>318,870</b>	<b>250,000</b>	<b>225,000</b>	<b>250,000</b>	<b>-</b>	<b>0%</b>
<b>Total Revenue</b>	<b>414,213</b>	<b>318,870</b>	<b>250,000</b>	<b>225,000</b>	<b>250,000</b>	<b>-</b>	<b>0%</b>
Personnel Services	-	-	566,970	596,969	585,424	18,454	3%
Materials & Services	616,092	862,640	674,500	518,644	889,390	214,890	32%
<b>Operating Expense</b>	<b>616,092</b>	<b>862,640</b>	<b>1,241,470</b>	<b>1,115,613</b>	<b>1,474,814</b>	<b>233,344</b>	<b>19%</b>
Special Payments	71,456	157,343	240,000	90,000	220,000		
<b>Total Expense</b>	<b>687,548</b>	<b>1,019,983</b>	<b>1,481,470</b>	<b>1,205,613</b>	<b>1,694,814</b>	<b>213,344</b>	<b>14%</b>
<b>Revenues Less Expenses</b>	<b>(273,335)</b>	<b>(701,113)</b>	<b>(1,231,470)</b>	<b>(980,613)</b>	<b>(1,444,814)</b>	<b>(213,344)</b>	<b>-</b>

**Significant Issues and Changes**



# County Clerk

## Recording Program




### Purpose Statement

The purpose of the Recording program is to provide marriage license, real property records access, and document recording services to the public

### Performance Narrative Statement

The Recording program has a \$792,115 operating budget, a slight increase 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 19-20 Actuals	FY 20-21 Actuals	FY 21-22 Targets	FY 21-22 Projected Performance	FY 22-23 Target
 Result	% Recorded documents returned within 10 business days			70%	70%	80%
 Result	% Requests for certified documents fulfilled within two business days of request			70%	70%	80%
 Result	% Recorded documents indexed within five business days of being recorded			25%	40%	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



County Clerk

Recording

**Budget Summary**

	FY 19-20 Actual	FY20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Fund Balance</b>	<b>245,275</b>	<b>197,098</b>	<b>461,003</b>	<b>391,460</b>	<b>143,108</b>	-	-
Federal, State, Local, All Other Gifts & Donations	-	-	1,628	1,628	-	(1,628)	-100%
Charges, Fees, License, Permits, Fines, Assessments	289,046	389,203	200,000	269,543	200,000	-	-
<b>Operating Revenue</b>	<b>289,046</b>	<b>389,203</b>	<b>201,628</b>	<b>271,171</b>	<b>200,000</b>	<b>(1,628)</b>	<b>-1%</b>
<b>Total Revenue</b>	<b>534,321</b>	<b>586,301</b>	<b>662,631</b>	<b>662,631</b>	<b>343,108</b>	<b>(319,523)</b>	<b>-48%</b>
Personnel Services	246,251	104,809	331,008	331,008	556,021	225,013	68%
Materials & Services	90,973	87,107	190,755	183,825	228,094	37,339	20%
Capital Outlay	-	2,925	8,000	4,690	8,000	-	-
<b>Operating Expense</b>	<b>337,224</b>	<b>194,841</b>	<b>529,763</b>	<b>519,523</b>	<b>792,115</b>	<b>262,352</b>	<b>50%</b>
<b>Total Expense</b>	<b>337,224</b>	<b>194,841</b>	<b>529,763</b>	<b>519,523</b>	<b>792,115</b>	<b>262,352</b>	<b>50%</b>
Ending Fund Balance - Restricted				143,108			
<b>Revenues Less Expenses</b>	<b>197,097</b>	<b>391,460</b>	<b>132,868</b>	<b>-</b>	<b>(449,007)</b>	<b>(581,875)</b>	<b>-438%</b>

**Significant Issues and Changes**



## County Clerk

### Records Management Program




#### 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 has a \$838,050 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 19-20 Actuals	FY 20-21 Actuals	FY 21-22 Targets	FY 21-22 Projected Performance	FY 22-23 Target
 Result	% Permanent, hardcopy documents stored in Records Management will be converted to archival film (target 100% by 2023)			100%	30%	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%	25%	50%

*\*The program applies new measures from FY21.*

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 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.



County Clerk

Records Management

Budget Summary

	FY 19-20 Actual	FY 20-21 Actual	FY 21-22 Amended Budget	FY 21-22 Projected Year End	FY 22-23 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Fund Balance</b>	<b>206,602</b>	<b>170,977</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>0%</b>
Federal, State, Local, All Other Gifts & Donations	54,346	5,812	1,900	1,900	-	(1,900)	-100.0%
Charges, Fees, License, Permits, Fines, Assessments	594,388	443,109	723,347	598,347	829,970	106,623	14.7%
<b>Operating Revenue</b>	<b>648,734</b>	<b>448,921</b>	<b>725,247</b>	<b>600,247</b>	<b>829,970</b>	<b>104,723</b>	<b>14.4%</b>
<b>Total Revenue</b>	<b>855,336</b>	<b>619,898</b>	<b>725,247</b>	<b>600,247</b>	<b>829,970</b>	<b>104,723</b>	<b>14.4%</b>
Personnel Services	440,956	364,372	542,859	543,860	571,340	28,481	5.2%
Materials & Services	243,402	239,710	182,388	255,549	266,710	84,322	46.2%
<b>Operating Expense</b>	<b>684,358</b>	<b>604,082</b>	<b>725,247</b>	<b>799,409</b>	<b>838,050</b>	<b>112,803</b>	<b>15.6%</b>
<b>Total Expense</b>	<b>684,358</b>	<b>604,082</b>	<b>725,247</b>	<b>799,409</b>	<b>838,050</b>	<b>112,803</b>	<b>15.6%</b>
<b>Revenues Less Expenses</b>	<b>170,978</b>	<b>15,816</b>	<b>-</b>	<b>(199,162)</b>	<b>(8,080)</b>	<b>(8,080)</b>	

Significant Issues and Changes