



County Clerk

2021-2022 BUDGET PRESENTATION



2020 Major Accomplishments

AREA	DESCRIPTION
Recording	Recorded documents are at record highs providing revenue not only to our office, but the County general fund as well.
Recording	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 in 20/21 including the Primary and General Presidential Elections, a special election for City of Portland, and two special elections for City of Oregon City with absolutely no issues due to the Pandemic.
Records Management	Processed over 400 rolls of microfilm in house with the new dark room that was installed, with a cost savings to the County of \$28,920 by not having to outsource that work.
Board of Property Tax Appeals	Completed the 2020 and 2021 Property tax appeals hearings in person and via video conference for hundreds of property tax appeals, allowing citizens to contest their property values. Our work was completed on time during pandemic years.

Performance Clackamas

Results Measures

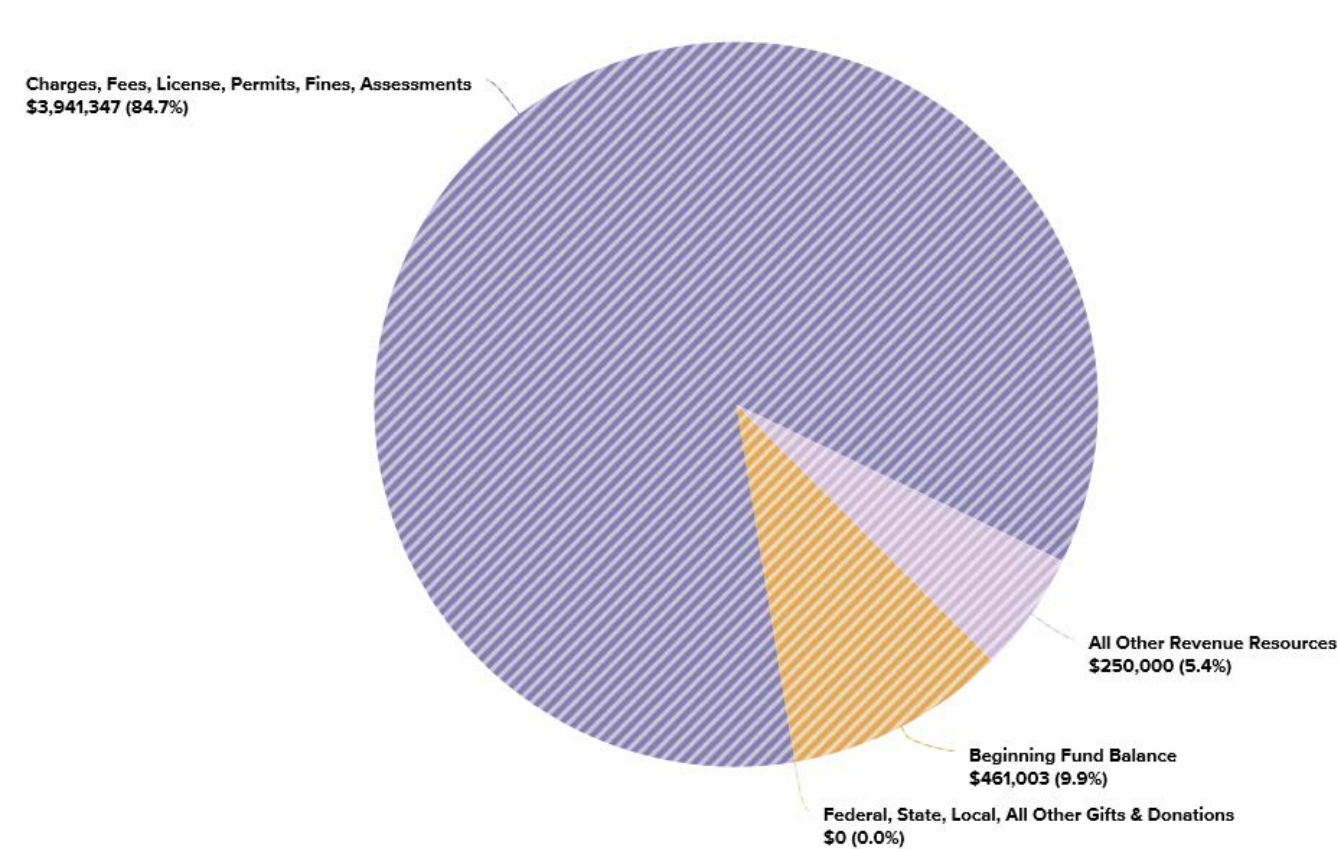
Line of Business/Program	Results Measure		FY 20-21 Actual	FY 20-21 Target	FY 20-21 Projected Performance	FY 21-22 Target
Elections	Elections open to observation		100%	100%	100%	100%
Clerk	Employees with annual performance summary completed		90%	100%	100%	100%
Board of Property Tax Appeals	% Petitioners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

Program Profiles: 2021-22 Summary

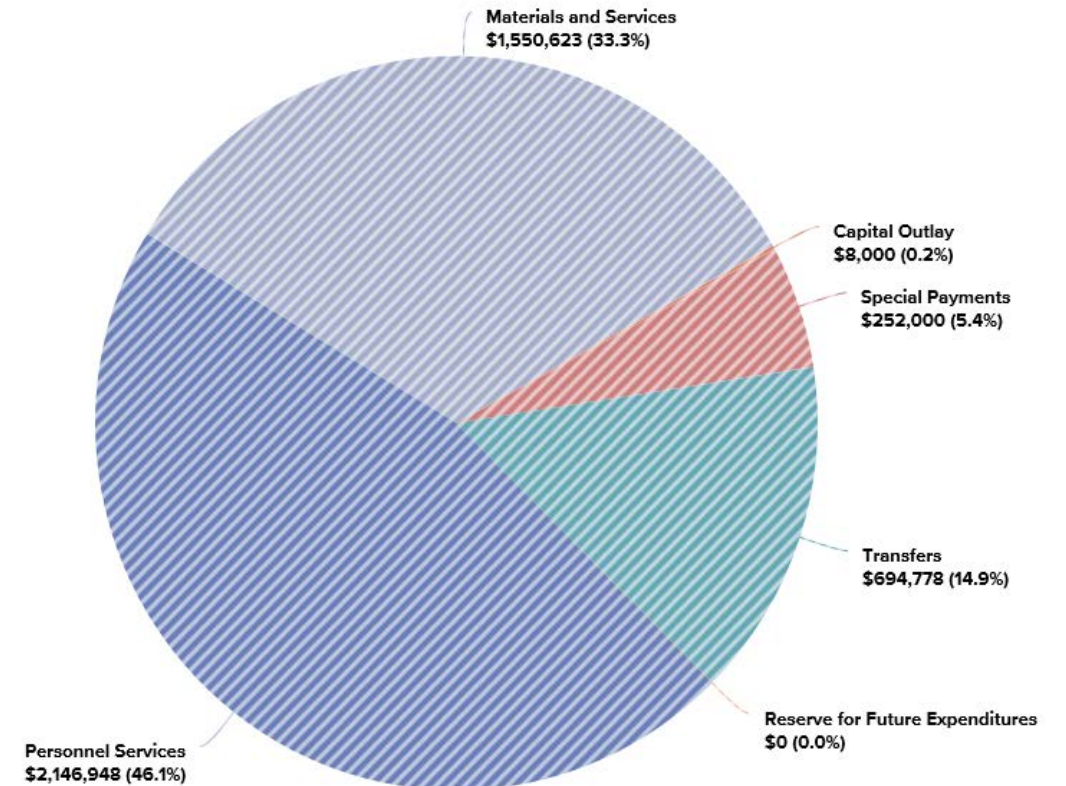
Line of Business	Total Funds	% County General Funds	% Restricted Funds	Mandate: Fed/State/Cty /IGA/None	% Program Operated by County	Metrics: % Target Meet/Exceed or Improve
Office of the Clerk	\$1,907,398	0%	0%	Fed/State/County	100%	Meet
Board of Property Tax Appeals	\$12,000	0%	0%	State/County	100%	Meet
Elections	\$1,481,470	0%	0%	Fed/State	100%	Exceed
Recording/Passports	\$528,135	0%	20%	State/County	100%	Meet
Records Management	\$723,347	0%	0%	State/County	100%	Meet

2021/22 Revenue and Expenses

Revenue



Expenses



Summary of Revenue & Expenses

County Clerk Department (13) Summary of Revenue and Expense

	FY 18-19 Actuals	FY 19-20 Actuals	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	518,165	451,877	591,667	130,664	461,003	-130,664	-22.1%
Federal, State, Local, All Other Gifts & Donations	-	72,904	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	3,254,440	4,307,737	3,308,177	3,688,447	3,941,347	633,170	19.1%
All Other Revenue Resources	194,916	414,177	285,000	285,000	250,000	-35,000	-12.3%
Operating Revenue	3,449,356	4,794,818	3,593,177	3,973,447	4,191,347	598,170	16.6%
Total Revenue	3,967,521	5,246,695	4,184,844	4,104,111	4,652,350	467,506	11.2%
Personnel Services	1,802,904	1,814,614	2,030,141	1,846,873	2,159,420	116,807	6.4%
Materials and Services	1,593,518	1,423,740	1,631,343	1,855,811	1,550,623	-80,720	-4.9%
Capital Outlay	24,852	3,092	8,000	0	8,000	0	0.0%
Operating Expense	3,421,274	3,241,446	3,669,484	3,702,684	3,718,043	36,087	1.3%
Special Payments	94,371	77,964	252,000	193,500	252,000	-	-
Reserve for Future Expenditures	-	-	263,360	-	-	-263,360	-100.0%
Total Expense	3,515,645	3,319,410	4,184,844	3,896,184	3,970,043	-214,801	-5.1%
Revenues Less Expenses	451,876	1,927,285	-	207,927	682,307	682,307	-
Full Time Equiv Positions (FTE) Budgeted	19.0	19.0	19.0	19.0	19.0	0.0	0.0%

Department Summary by Fund

County Clerk (13)



Department Budget Summary by Fund

<i>Line of Business</i>	FY 21/22	FY 21/22	FY 21/22	FY 21/22
<i>Program</i>	FTE	General Fund	Total Proposed Budget	General Fund Support Included in Proposed Budget**
Clerk's Office				
Office of the Clerk	5.5	1,907,398	1,907,398	
Board of Property Tax Appeals		12,000	12,000	
Elections	5.0	1,481,470	1,481,470	
Recording	3.5	528,135	528,135	
Records Management	5.0	723,347	723,347	
TOTAL	19.0	4,652,350	4,652,350	
FY 20/21 Budget	19.0	4,184,844	4,184,844	
\$ Increase (Decrease)	0.0	467,506	467,506	
% Increase (Decrease)	0.0%	11.2%	11.2%	

**

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

Significant Policy and/or Financial Issues

DESCRIPTION	IMPACT
Potential to hold recall elections	Requirement for increased elections budget in a non primary/gubernatorial/presidential election year.
Potential for changes in housing market	Potential to decrease Recording office revenue.

End of Presentation

Thank you



County Clerk (13)

County 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.

County Clerk (13)

Sherry Hall - County Clerk

FTE 19.0

Total Proposed \$4,652,350

General Fund Support \$ 0

Clerk's Office

Sherry Hall - County Clerk

FTE 19.0

Total Proposed

\$4,652,350

Gen Fund \$ 0

Office of the Clerk

Sherry Hall

FTE 5.5

Total Proposed

\$1,907,398

Gen Fund \$ 0

Board of Property Tax Appeals

Sherry Hall

FTE 0

Total Proposed

\$12,000

Gen Fund \$ 0

Elections

Vacant

FTE 5.0

Total Proposed

\$1,481,470

Gen Fund \$ 0

Recording

Vacant

FTE 3.5

Total Proposed

\$528,135

Gen Fund \$ 0

Records

Carol Hopkins Mgr

FTE 5.0

Total Proposed

\$723,347

Gen Fund \$ 0



County Clerk (13)

Department Budget Summary by Fund

<i>Line of Business</i>		FY 21/22	FY 21/22	FY 21/22	FY 21/22
<i>Program</i>	<i>Prog#</i>	FTE	General Fund	Total Proposed Budget	General Fund Support Included in Proposed Budget**
Clerk's Office					
Office of the Clerk	130101	5.5	1,907,398	1,907,398	
Board of Property Tax Appeals	130102		12,000	12,000	
Elections	130103	5.0	1,481,470	1,481,470	
Recording	130105	3.5	528,135	528,135	
Records Management	130106	5.0	723,347	723,347	
TOTAL		19.0	4,652,350	4,652,350	
FY 20/21 Budget					
		19.0	4,184,844	4,184,844	
\$ Increase (Decrease)		0.0	467,506	467,506	
% Increase (Decrease)		0.0%	11.2%	11.2%	

** 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 \$1,907,398, 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 Actual	FY 19-20 Actuals	FY 20-21 Actuals	FY 20-22 Target
 Result	% of Office of the Clerk results achieved			33%	60%
 Result	% of customers surveyed report they were happy with the level of service received			*withheld surveys due to pandemic	65%
 Result	% Employees with annual performance summary completed			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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Federal, State, Local, All Other Gifts & Donations	-	18,557	-	-	-	-	-
Charges, Fees, License, Permits, Fines, Assessments	2,339,147	3,424,303	2,468,000	2,900,000	3,018,000	550,000	22.3%
All Other Revenue Resources	194,916	(36)	-	-	-	-	-
Operating Revenue	2,534,063	3,442,824	2,468,000	2,900,000	3,018,000	550,000	22.3%
Total Revenue	2,534,063	3,442,824	2,468,000	2,900,000	3,018,000	550,000	22.3%
Personnel Services	1,244,957	1,127,408	1,514,508	1,385,000	722,111	(792,397)	-52.3%
Materials & Services	496,483	473,273	501,724	505,698	502,980	1,256	0.3%
Capital Outlay	24,852	3,092	-	-	-	-	-
Operating Expense	1,766,292	1,603,773	2,016,232	1,890,698	1,225,091	(791,141)	-39.2%
Special Payments	283	-	-	-	-	-	-
Total Expense	1,766,575	1,603,773	2,016,232	1,890,698	1,225,091	(791,141)	-39.2%
Revenues Less Expenses	767,488	1,839,051	451,768	1,009,302	1,792,909	1,341,141	

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 proposed a budget of \$12,000, 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 18-19 Actual	FY 19-20 Target	FY 20-21 Actuals	FY 21-22 Target
 Result	% Petitioners who received a decision/order from the Clerk's office within five business days			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 Clerk program.
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County Clerk

Board of Property Tax Appeals

Budget Summary

	FY 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
Operating Revenue	-	-	-	-	-	-	-
Total Revenue	-	-	-	-	-	-	-
Operating Expense	-	-	-	-	-	-	-
Special Payments	7,739	6,508	12,000	8,500	12,000	-	-
Total Expense	7,739	6,508	12,000	8,500	12,000	-	-
Revenues Less Expenses	-7,739	-6,508	-12,000	-8,500	-12,000	-	-
Significant Issues and Changes							



County Clerk

Elections




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 \$1,481,470.00 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 18-19 Actual	FY 19-20 Target	FY 20-21 Actuals	FY 21-22 Target
 Result	% Elections open to observation			100%	100%
 Result	% Ballot correspondence sent to voter within two business days			100%	100%
 Result	% Election filings on the County's website within one business day			100%	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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	-	-	-	-	-	-	-
All Other Revenue Resources	-	414,213	285,000	285,000	250,000	(35,000)	-12.3%
Operating Revenue	-	414,213	285,000	285,000	250,000	(35,000)	-12.3%
Total Revenue	-	414,213	285,000	285,000	250,000	(35,000)	-12.3%
Personnel Services	-	-	-	-	566,970	566,970	-
Materials & Services	742,042	616,092	658,000	906,444	674,500	16,500	2.5%
Operating Expense	742,042	616,092	658,000	906,444	1,241,470	583,470	88.7%
Special Payments	86,349	71,456	240,000	185,000	240,000	-	0%
Total Expense	828,391	687,548	898,000	1,091,444	1,481,470	583,470	65.0%
Revenues Less Expenses	(828,391)	(273,335)	(613,000)	(806,444)	(1,231,470)	(618,470)	

Significant Issues and Changes

Elections is contingency planning for the possibility of having to hold several unscheduled elections next year.



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 \$528,135 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 18-19 Actual	FY 19-20 Target	FY 19-20 Actuals	FY 20-21 Target
 Result	% Recorded documents returned within 10 business days			70%	80%
 Result	% Requests for certified documents fulfilled within two business days of request			70%	80%
 Result	% Recorded documents indexed within five business days of being recorded			25%	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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	344,764	245,275	461,003	-	461,003	-	0%
Charges, Fees, License, Permits, Fines, Assessments	212,475	289,046	175,000	230,270	200,000	25,000	14.3%
	-	-	-	-	-	-	0%
Operating Revenue	212,475	289,046	175,000	230,270	200,000	25,000	14.3%
Total Revenue	557,239	534,321	636,003	230,270	661,003	25,000	3.9%
Personnel Services	130,987	246,251	-	75,000	329,380	329,380	-
Materials & Services	112,335	90,973	191,411	168,911	190,755	(656)	-0.3%
Capital Outlay	-	-	8,000	-	8,000	-	0%
Operating Expense	243,322	337,224	199,411	243,911	528,135	328,724	164.8%
Reserve for Future Expenditures	-	-	263,360	-	-	(263,360)	-100.0%
Total Expense	243,322	337,224	462,771	243,911	528,135	65,364	14.1%
Revenues Less Expenses	313,917	197,097	173,232	-13,641	132,868	-40,364	

Significant Issues and Changes

Recording Fees are 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. We currently have no Recording manager due to a recent retirement. We have tested having the Records Management manager oversee the Recording program.



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 \$723,347 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 18-19 Actuals	FY 19-20 Actual	FY 20-21 Target	FY 20-21 Actual to date	FY 21-22 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 18-19 Actual	FY 19-20 Actual	FY 20-21 Amended Budget	FY 20-21 Projected Year End	FY 21-22 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
Beginning Fund Balance	173,401	206,602	130,664	130,664	-	(130,664)	-100.0%
Federal, State, Local, All Other Gifts & Donations	-	54,346	-	-	-	-	0%
Charges, Fees, License, Permits, Fines, Assessments	702,819	594,388	665,177	558,177	723,347	58,170	8.7%
Operating Revenue	702,819	648,734	665,177	558,177	723,347	58,170	8.7%
Total Revenue	876,220	855,336	795,841	688,841	723,347	(72,494)	-9.1%
Personnel Services	426,960	440,956	515,633	386,873	540,959	25,326	4.9%
Materials & Services	242,658	243,402	280,208	274,758	182,388	(97,820)	-34.9%
Operating Expense	669,618	684,358	795,841	661,631	723,347	(72,494)	-9.1%
Total Expense	669,618	684,358	795,841	661,631	723,347	(72,494)	-9.1%
Revenues Less Expenses	206,602	170,978	-	27,210	-	-	

Significant Issues and Changes