



## **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/>



# County Clerk Department

## 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 Department</h2> <p style="margin: 0;">Sherry Hall, County Clerk FTE 19.0 Total Request \$3,395,812</p>
<p style="margin: 0;">General Fund Support \$0</p>

<p><b>County Clerk</b> Sherry Hall Cty Clerk Total Request \$2,786,281</p>
<p>Gen Fund \$0</p>

<p><b>Records Mgt</b> Carol Hopkins Mgr Total Request \$609,531</p>
<p>Gen Fund \$0</p>

<p><b>Office of the Clerk/BOPTA</b> Sherry Hall Cty Clerk FTE 2.00 Total Request \$417,288</p>
<p>Gen Fund \$0</p>

<p><b>Records Mgt</b> Carol Hopkins Mgr FTE 5.00 Total Request \$609,531</p>
<p>Gen Fund \$0</p>

<p><b>Elections</b> Steve Kindred Mgr FTE 5.00 Total Request \$1,345,084</p>
<p>Gen Fund \$0</p>

<p><b>Recording</b> Cindy Swick Mgr FTE 7.00 Total Request \$1,023,909</p>
<p>Gen Fund \$0</p>



# County Clerk Line of Business

## County Clerk Purpose Statement

The purpose of the County Clerk line of business 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.

### Clerk Department

Sherry Hall - County Clerk

FTE 19.00

Total Request \$3,395,812

General Fund Support \$0

#### County Clerk

Mgr

Total Request

\$2,786,281

Gen Fund \$0

#### Clerk/BOPTA

Sherry Hall - Mgr

FTE 2.00

Total Request

\$417,288

Gen Fund \$0

#### Elections

Steve Kindred - Mgr

FTE 5.00

Total Request

\$1,345,084

Gen Fund \$0

#### Recording

Cindy Swick - Mgr

FTE 7.00

Total Request

\$1,023,909

Gen Fund \$0



# County Clerk Line of Business

Office of the Clerk Program

## Performance Narrative Statement

The Office of the Clerk program proposes a \$417,288 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

		2015/2016 Target	2016/2017 Target
Result	*% of Office of the Clerk results achieved	%	%
 Result	% of Petitioners whose appeal is heard by BOPTA	100%	100%
 Result	% Petitioners who receive a decision from the Clerk's office within five business days of their hearing	100%	100%

\*first year of performance Clackamas no metrics to report yet

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

\* Board of Property Tax Appeals



County Clerk Line of Business

Office of the Clerk Program

Budget Summary

	FY 13-14 Actual	FY 14-15 Actual	FY 15-16 Amended Budget	FY 15-16 Projected Year End	FY 16-17 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>						-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	-	-	-	-	417,288	417,288	0%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
<b>Operating Revenue</b>	-	-	-	-	417,288	417,288	0%
<b>Total Rev - Including Beginning Bal</b>	-	-	-	-	417,288	417,288	0%
Personnel Services	-	-	-	-	227,592	227,592	0%
Materials & Services	-	-	-	-	80,314	80,314	0%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	-	-	-	-	109,382	109,382	0%
<b>Operating Expenditure</b>	-	-	-	-	417,288	417,288	0%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Capital Outlay	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
<b>Total Exp - Including Special Categories</b>	-	-	-	-	417,288	417,288	0%
<b>General Fund Support (if applicable)</b>	0	0	0	0	0	0	0%
Full Time Equiv Pos (FTE) Budgeted	0.00	0.00	0.00	0.00	2.00	2.00	0%
Full Time Equiv Pos (FTE) Filled at Yr End	0.00	0.00	0.00	0.00	2.00	2.00	
Full Time Equiv Pos (FTE) Vacant at Yr End	0.00	0.00	0.00	0.00	0.00	0.00	

Significant Issues and Changes



# County Clerk Line of Business

## Elections Program

### Performance Narrative Statement

The Elections program proposes a \$1,345,084 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 15-16 Year End Target	FY 16-17 Target
Result	% Voter Notification cards sent within two weeks of receipt of the voter registration	%	%
Result	% Voters will be able to place their ballot in any of the County's drop boxes	%	%
Result	% Voter registrations kept up to date on a daily basis as of the final mailing	%	%
Result	% Voters who live no more than X miles from a ballot drop site	%	%
Result	% Elections that meet or exceed transparency requirements	%	%
Result	% Ballots opened by a team of two to four people of different affiliations	%	%
Result	100% of boundary change completed within five days	100%	100%
Result	100% Elections open to observation	100%	100%

\*first year of performance Clackamas no metrics to report yet

Program includes:

Mandated Services  Y/N  Yes

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



County Clerk Line of Business

Elections Program

Budget Summary

	FY 13-14 Actual	FY 14-15 Actual	FY 15-16 Amended Budget	FY 15-16 Projected Year End	FY 16-17 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>						-	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service (Recording Fees)	-	-	-	-	1,145,084	1,145,084	0%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenue (Elections Reimbursement)	-	-	-	-	200,000	200,000	0%
Interfund Transfers	-	-	-	-	-	-	0%
<b>Operating Revenue</b>	-	-	-	-	1,345,084	1,345,084	0%
<b>Total Rev - Including Beginning Bal</b>	-	-	-	-	1,345,084	1,345,084	0%
Personnel Services	-	-	-	-	620,652	620,652	0%
Materials & Services	-	-	-	-	615,050	615,050	0%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	-	-	-	-	109,382	109,382	0%
<b>Operating Expenditure</b>	-	-	-	-	1,345,084	1,345,084	0%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Capital Outlay	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
<b>Total Exp - Including Special Categories</b>	-	-	-	-	1,345,084	1,345,084	0%
<b>General Fund Support (subsidy)</b>	0	0	0	0	0	0	0%
Full Time Equiv Pos (FTE) Budgeted	0.00	0.00	0.00	0.00	5.00	5.00	0%
Full Time Equiv Pos (FTE) Filled at Yr End	0.00	0.00	0.00	0.00	5.00	5.00	
Full Time Equiv Pos (FTE) Vacant at Yr End	0.00	0.00	0.00	0.00	0.00	0.00	

**Significant Issues and Changes**



# County Clerk Line of Business

## Recording Program

### Performance Narrative Statement

The Recording program proposes a \$1,023,909 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 15-16 Year End Target	FY 16-17 Target
 Result	% Customers who find the recorded records they are looking for	%	%
 Result	% Recordable documents are recorded on the same day they are received	%	%
 Result	% Recorded documents returned within X days	%	%
 Result	% Requests for certified documents fulfilled within X days	%	%

\*first year of performance Clackamas no metrics to report yet

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



County Clerk Line of Business

Recording Program

Budget Summary

	FY 13-14 Actual	FY 14-15 Actual	FY 15-16 Amended Budget	FY 15-16 Projected Year End	FY 16-17 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>					335,004	335,004	0%
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	-	-	-	-	688,905	688,905	0%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
<b>Operating Revenue</b>	-	-	-	-	688,905	688,905	0%
<b>Total Rev - Including Beginning Bal</b>	-	-	-	-	1,023,909	1,023,909	0%
Personnel Services	-	-	-	-	472,125	472,125	0%
Materials & Services	-	-	-	-	242,562	242,562	0%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	-	-	-	-	109,382	109,382	0%
<b>Operating Expenditure</b>	-	-	-	-	824,069	824,069	0%
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Capital Outlay	-	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	199,840	199,840	0%
Contingency	-	-	-	-	-	-	0%
<b>Total Exp - Including Special Categories</b>	-	-	-	-	1,023,909	1,023,909	0%
<b>General Fund Support (subsidy)</b>	0	0	0	0	0	0	0%
Full Time Equiv Pos (FTE) Budgeted	0.00	0.00	0.00	0.00	5.00	5.00	0%
Full Time Equiv Pos (FTE) Filled at Yr End	0.00	0.00	0.00	0.00	5.00	5.00	
Full Time Equiv Pos (FTE) Vacant at Yr End	0.00	0.00	0.00	0.00	0.00	0.00	

**Significant Issues and Changes**



# Records Management Line of Business

## 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  
 \$3,395,812  
 Total Request  
 General Fund Support \$0

<b>Records Mgt</b>	
Carol Hopkins Mgr	
Total Request	
\$609,531	
Gen Fund	\$0

<b>Records Mgt</b>	
Carol Hopkins Mgr	
FTE 5.00	
Total Request	
\$609,531	
Gen Fund	\$0



# Records Management Line of Business

## Records Management Program

### Performance Narrative Statement

Records Management proposes a \$609,531 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

		2015/2016 Target	2016/2017 Target
 Result	Zero unauthorized access to records	%	%
 Result	X% Permanent, hardcopy documents stored in Records Management will be converted to archival film	%	%
 Result	X% Non-rush Department Records Requests delivered within one working day	%	%
 Result	X% Department rush Records Requests delivered within one hour or less	%	%
 Result	X% Records will be destroyed within 30 days of appearing on the Destruct List	%	%
 Result	X% applicants who receive their passport within the stipulated time frame	%	%

\*first year of performance Clackamas no metrics to report yet

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 Line of Business

Records Management Program

Budget Summary

	FY 13-14 Actual	FY 14-15 Actual	FY 15-16 Amended Budget	FY 15-16 Projected Year End	FY 16-17 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>	<b>219,867</b>	<b>282,919</b>	<b>77,293</b>	<b>100,422</b>	<b>10,961</b>	<b>(66,332)</b>	<b>-85.8%</b>
Prior Year Revenue	-	-	-	-	-	-	0%
Taxes	-	-	-	-	-	-	0%
Licenses & Permits	-	-	-	-	-	-	0%
Federal Grants & Revenues	-	-	-	-	-	-	0%
State Grants & Revenues	-	-	-	-	-	-	0%
Local Grants & Revenues	-	-	-	-	-	-	0%
Charges for Service	660,997	406,432	508,665	502,836	598,570	89,905	17.7%
Fines & Penalties	-	-	-	-	-	-	0%
Other Revenues	36,340	(41)	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
<b>Operating Revenue</b>	<b>697,337</b>	<b>406,391</b>	<b>508,665</b>	<b>502,836</b>	<b>598,570</b>	<b>89,905</b>	<b>17.7%</b>
<b>Total Rev - Including Beginning Bal</b>	<b>917,204</b>	<b>689,310</b>	<b>585,958</b>	<b>603,258</b>	<b>609,531</b>	<b>23,573</b>	<b>4.0%</b>
Personnel Services	404,969	377,906	398,253	408,093	419,911	21,658	5.4%
Materials & Services	89,131	96,252	72,412	67,219	71,586	(826)	-1.1%
Indirect Costs (Internal Dept Chgs)	-	-	-	-	-	-	0%
Cost Allocation Charges	130,833	114,731	115,293	116,985	118,034	2,741	2.4%
<b>Operating Expenditure</b>	<b>624,933</b>	<b>588,889</b>	<b>585,958</b>	<b>592,297</b>	<b>609,531</b>	<b>23,573</b>	<b>4.0%</b>
Debt Service	-	-	-	-	-	-	0%
Special Payments	-	-	-	-	-	-	0%
Interfund Transfers	-	-	-	-	-	-	0%
Capital Outlay	9,351	-	-	-	-	-	0%
Reserve for Future Expenditures	-	-	-	-	-	-	0%
Contingency	-	-	-	-	-	-	0%
<b>Total Exp - Including Special Categories</b>	<b>634,284</b>	<b>588,889</b>	<b>585,958</b>	<b>592,297</b>	<b>609,531</b>	<b>23,573</b>	<b>4.0%</b>
<b>General Fund Support (if applicable)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0%</b>
Full Time Equiv Pos (FTE) Budgeted	6.00	5.00	5.00	5.00	5.00	0.00	0%
Full Time Equiv Pos (FTE) Filled at Yr End	6.00	5.00	5.00	5.00	5.00	0.00	
Full Time Equiv Pos (FTE) Vacant at Yr End	0.00	0.00	0.00	0.00	0.00	0.00	

**Significant Issues and Changes**



County Clerk Department

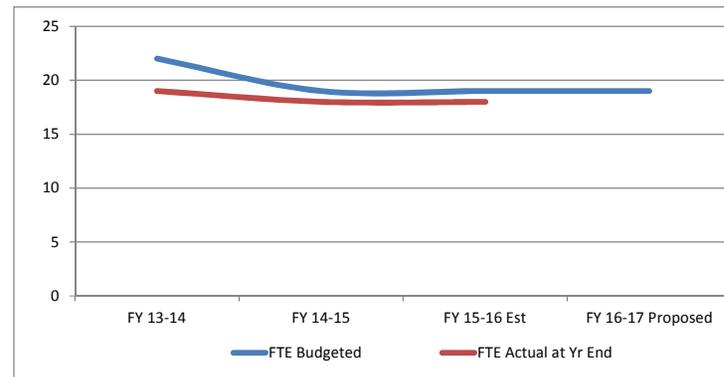
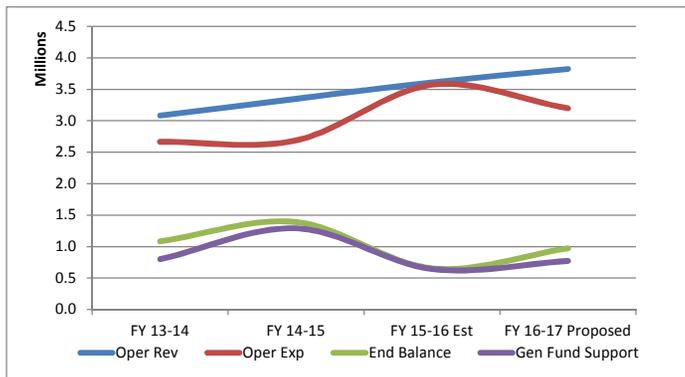
Department Budget Summary by Fund

<i>Line of Business</i>	FY 16/17	FY 16/17	FY 16/17	FY 16/17	FY 16/17	FY 16/17	FY 16/17	FY 16/17
<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	417,288					417,288	
Elections	5.0	1,345,084					1,345,084	
Recording	7.0	1,023,909					1,023,909	
							-	
Records Management							-	
Records Management	5.0		609,531				609,531	
							-	
<b>TOTAL</b>	<b>19.0</b>	<b>\$ 2,786,281</b>	<b>\$ 609,531</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 3,395,812</b>	<b>\$ (771,779)</b>
<i>FY 15/16 Budget</i>	19.0	\$ 2,917,597	\$ 585,958				\$ 3,503,555	\$ (303,153)
<i>\$ Increase (Decrease)</i>	0.0	\$ (131,316)	\$ 23,573	\$ -	\$ -	\$ -	\$ (107,743)	\$ (468,626)
<i>% Increase (Decrease)</i>	0.0	-4.50%	4.02%				-3.08%	154.58%

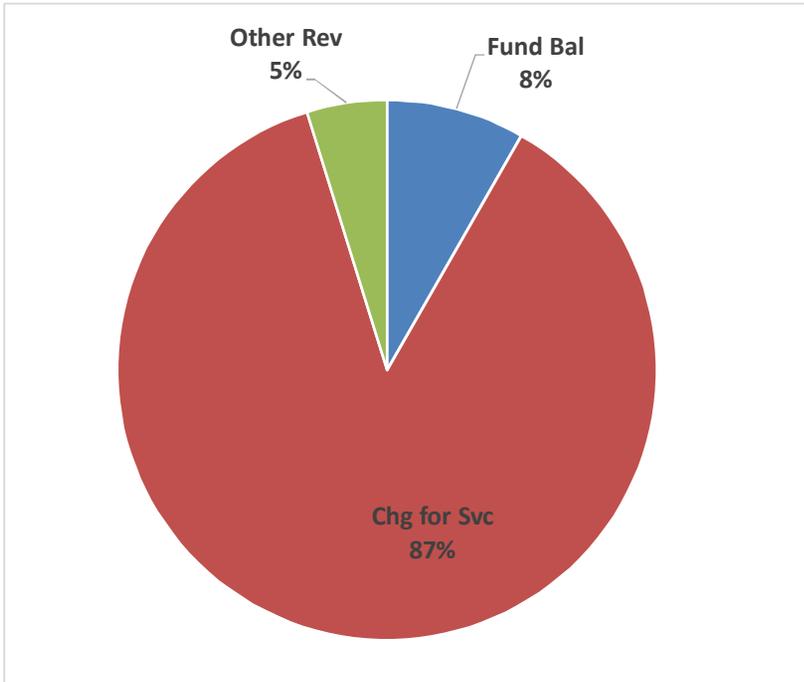
\*\* *General Fund subsidy is support from unrestricted General Fund revenues, primarily property tax Recording Fees are accounted for in the Clerk's organization of the General Fund. These revenues generate more than the amount required to support the Clerk's operations in the General Fund. The excess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

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

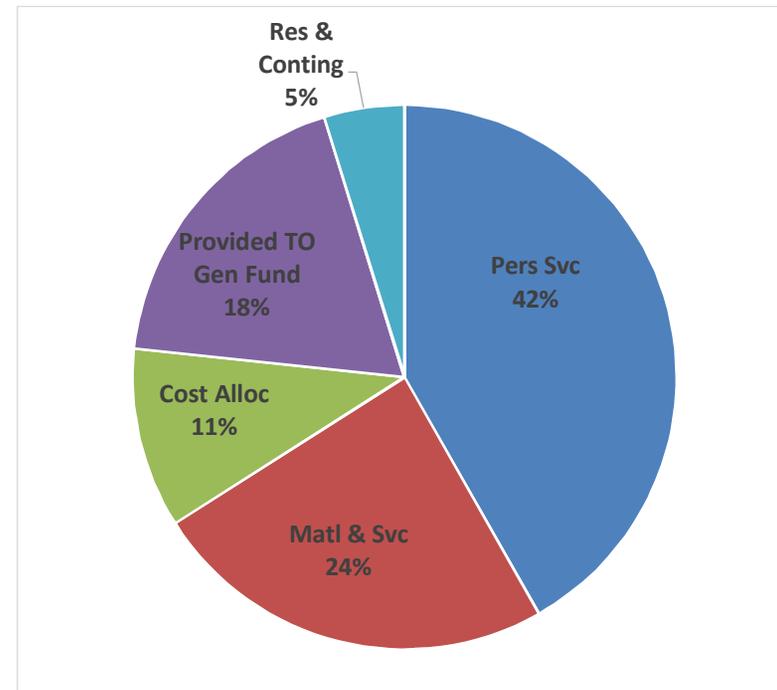
	FY 13-14	FY 14-15	FY 15-16 Amended Budgeted	FY 15-16 Projected Year End	FY 16-17 Proposed Budget	Chg from Prior Yr Budget	% Chg from Prior Yr Budget
<b>Beginning Balance</b>	<b>664,905</b>	<b>727,662</b>	<b>593,293</b>	<b>616,422</b>	<b>345,965</b>	<b>-247,328</b>	<b>-41.7%</b>
Prior Year Revenue	0	0	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	2,851,008	3,087,078	3,113,415	3,507,981	3,621,626	508,211	16.3%
Fines & Penalties	0	0	0	0	0	0	0%
Other Revenue	229,550	260,962	100,000	100,256	200,000	100,000	100.0%
Interfund Transfers	0	0	0	0	0	0	0%
<b>Operating Revenue</b>	<b>3,080,558</b>	<b>3,348,040</b>	<b>3,213,415</b>	<b>3,608,237</b>	<b>3,821,626</b>	<b>608,211</b>	<b>18.9%</b>
% Change	NA	8.7%	-4.0%	7.8%	5.9%		
Personnel Services	1,533,273	1,575,839	1,694,248	1,704,088	1,740,279	46,031	2.7%
Materials & Services	590,923	722,304	1,021,382	898,114	1,009,512	-11,870	-1.2%
Cost Allocation Charges	406,368	388,405	422,632	424,324	446,181	23,549	5.6%
Debt Service	0	0	0	0	0	0	0%
Interfund Transfers	0	0	0	0	0	0	0%
Capital Outlay	133,667	0	5,000	544,230	0	-5,000	-100.0%
<b>Operating Expenditure</b>	<b>2,664,231</b>	<b>2,686,548</b>	<b>3,143,262</b>	<b>3,570,756</b>	<b>3,195,972</b>	<b>52,710</b>	<b>1.7%</b>
% Change	NA	0.8%	17.0%	32.9%	-10.5%		
Reserve for Future Expenditures	0	0	360,293	0	199,840	-160,453	-44.5%
Contingency	0	0	0	0	0	0	0%
<b>Ending Balance (if applicable)</b> (includes Reserve & Contingency)	<b>1,081,232</b>	<b>1,389,154</b>	<b>663,446</b>	<b>653,903</b>	<b>971,619</b>	<b>308,173</b>	<b>46.5%</b>
<b>Revenue provided TO General Fund</b>	<b>798,314</b>	<b>1,288,734</b>	<b>303,153</b>	<b>642,942</b>	<b>771,779</b>	<b>468,626</b>	<b>154.6%</b>
Full Time Equiv Positions (FTE) Budgeted	22.0	19.0	19.0		19.0	0.0	0%
Full Time Equiv Positions (FTE) Filled at Yr End	19.0	18.0		18.0			
Full Time Equiv Positions (FTE) Vacant at Yr End	3.0	1.0		1.0			



**County Clerk Department  
FY 16-17 Proposed Budget**



**Resources**



**Requirements**