

# Assessor/Recorder/County Clerk

## Mission Statement

To provide excellent customer service at life's most precious moments for the citizens, property owners, and businesses in San Diego County in the real estate recordation, vital records, marriage services, document preservation, and real & business valuations space. The office is the primary advocate and processing entity for tax savings for property owners.

## Department Description

The Assessor is mandated by the Constitution of the State of California to locate, identify, and establish values and apply exemptions (tax savings) for all vacant land, improved real estate, business property and certain manufactured homes, boats, and aircraft. In addition, the Assessor maintains records and data on all taxable properties within the boundaries of the County of San Diego, including ownership and address information, and parcel maps of all real property.

The Recorder is responsible for maintaining and making accessible a wide range of important public records. As mandated by the California Government Code, the Recorder examines, records, indexes, and archives records submitted for recordation or filing, including deeds, mortgages, and liens. This ensures the integrity and accuracy of these records, which are essential for individuals and organizations to establish ownership and legal rights to property. Additionally, the Recorder is responsible for making these records available to the public and providing certified copies of birth, death, and public marriage certificates, which are important personal documents that individuals may need for legal and administrative purposes.

The County Clerk oversees the issuance and maintains a record of fictitious business names based on statements filed, which are necessary for businesses operating under a name different from the legal owner's name. Additionally, the County Clerk is responsible for issuing public and confidential marriage licenses and performing civil marriage ceremonies, which are important milestones in a couple's lives. Furthermore, The County Clerk also files and registers Notary Public Oaths of Office and Professional Registrations.

Overall, the Assessor/Recorder/County Clerk plays a crucial role in maintaining important records and helping citizens navigate many legal and life-changing processes.

To ensure these critical services are provided, the Assessor/Recorder/ County Clerk (ARCC) has 448.50 staff years and a budget of \$89.4 million.



## 2022–23 Anticipated Accomplishments



### Equity

- Economic Opportunity: Dismantle barriers to expanding opportunities in traditionally underserved communities and businesses, especially communities of color and low income.
  - Established community educational partners and community advisors for traditionally underrepresented populations that transact business with the ARCC.
  - Partnered with San Diego County Human Resources to help underserved communities find job opportunities within the department by participating in the Jay's Program employer social to assist with adults with neurodiversity.
  - Completed Phase 1 of the AB1466 Restrictive Covenant Program according to the implementation plan to identify unlawfully restrictive covenants in the records of their office, and to redact unlawfully restrictive covenants, as specified and made it available to the public.
- Economic Opportunity: Advance opportunities for economic growth and development to all individuals and the community.
  - Partnered and communicated with Logan Heights Community Development Center (CDC) by conducting Fictitious Business Name workshops in San Diego County to promote the economic growth of small businesses in traditionally underserved communities.
  - Conducted an annual supplier diversity workshop for traditionally underrepresented small business owners on how to do business with the County and ARCC.
  - Conducted Black-Owned Business empowerment workshop.
  - Hosted "On The RISE" Black Leadership Series in partnership with non-profit organizations such as AT&T Foundation and Office of Equity and Racial Justice.



## Sustainability

- Climate: Actively combat climate change through innovative or proven policies, green jobs, sustainable facility construction or maintenance and hazard mitigation.
  - Short-term: Developed and refined the ARCC's Telework Plan by optimizing eligibility of teleworking employees, thereby maintaining current office footprint despite increase in staffing.
  - Short-term: Identified an office function for paperless operation by changing the format of the Address Change form which allowed customers to certify property ownership and send the completed form via e-mail. This eliminated the need to print out the form and mail it in, eliminating substantial paper waste.
  - Short-term: Participated in zero waste related educational events by communicating to staff about community engagement opportunities, such as Regional Decarbonization Framework.
  - Short-term: Provided trainings to employees about sustainability topics.
  - Mid-term: Written or verbal suggestions and feedback on sustainability initiatives or programs was not collected in Fiscal Year 2022–23 and will begin collecting from all employees in Fiscal Year 2023–24.
  - Long-term: Installed filtered water bottle refill stations at all the branch offices.



## Community

- Engagement: Inspire civic engagement by providing information, programs, public forums or other avenues that increase access for individuals or communities to use their voice, their vote, and their experience to impact change.
  - Provided the public with services that are of value to them in a competent and professional manner by achieving a customer service rating of 99%.
  - Completed a Request for Proposal (RFP) for an archival Collections Management System (CMS) for the County Archives to enhance online public discovery and use of the Recorder/County Clerk historic records collections and inspire civic engagement by encouraging an understanding of democracy, history, and culture to impact change. The RFP resulted in one vendor submission so the contract was not awarded or implemented. The solicitation process will continue into Fiscal Year 2023–24.
  - Participated in two community home ownership shows to bring services to the community.
  - Launched free cutting-edge fraud fighting tool for property owners. Conducted community outreach and enrollment workshops for this public tool.

- Designed and implemented a Traveling Lecture Program where Archives staff visit local community organizations to provide an overview of the County Archives program and the role it plays in facilitating civic engagement by providing equitable access to public records.
- Partnership: Facilitate meaningful conversations, shared programming, grant opportunities, or other opportunities to maximize resources through community partnerships to benefit the region.
  - Increased community partnerships with qualified institutions, such as schools, non-profits, museums, and religious organizations for property tax exemptions through additional outreach and education of the community.
  - Increased the number of qualified disabled veterans and their surviving spouses for the Disabled Veterans' Exemption to over 13,500 resulting in a total annual taxpayer savings exceeding \$19.0 million in property taxes.
  - Provided additional education and outreach that qualified homeowners for the Home Exemption Program increasing home affordability in San Diego County.
  - Provided second Saturday and extended weekday hours which increased services available outside normal business hours to obtain marriage licenses and ceremonies, Fictitious Business Name Statement filings, and vital record copies in the branch offices of the department.
  - Provided accessory dwelling unit (ADU) workshops to the community.
  - Created a video explaining tax-saving opportunities to seniors in the community.



## Empower

- Workforce: Invest in our workforce and operations by providing support services and excellent customer service to ensure continuity of operations remains at its best.
  - Ensured 100% (142 of 142) of appraiser/audit staff is current on all required training to maintain certifications and ability to properly locate, identify, and assess all property. This will assure the public and businesses a fair and uniform assessment under the auspices of all applicable State property tax laws, rules, and regulations.
  - Examined and processed 99.2% (255,143 of 257,201) of documents submitted for eRecording within three hours of receipt to provide customers a more efficient and secure recording and document return process.
  - Completed Recorder/County Clerk Continuity of Operations processes to expand on crisis management plan and encompass Disaster Recovery initiatives to ensure our ability to respond to the communities in the region in the event of an emergency. Conducted a tabletop exercise and scheduled a training to include drill exercise before June 30, 2023.





- Conducted departmental Employee Engagement survey to better understand organizational trends of strengths and opportunities for employee and systemic improvements.
- Completed upgrade of the department's Qmatic queueing system to move from an On-Premise solution to a cloud-based Software as a Service solution to ensure accessibility and continuity of operations.
- Held cultural heritage events at each branch office to enhance employee engagement and culture. The goal of the event was to help foster an office environment of openness and authenticity, and to provide employees with an opportunity to engage with diverse cultures and develop genuine relationships in the workplace.
- Transparency and Accountability: Maintain program and fiscal integrity through reports, disclosures, and audits.
  - Provided accurate property information for the public by timely updating ownership information for the buying, selling, and financing of property and reducing the wait time for Homeowners Exemption from 10 months to two months.
  - Completed 100% (162,333 of 162,333) of mandated assessments culminating in the Fiscal Year 2023–24 Assessment Roll by June 30, 2023.
- Innovation: Foster new ideas and the implementation of proven best practices to achieve organizational excellence.
  - In coordination with the Auditor and Controller, Treasurer-Tax Collector, Clerk of the Board of Supervisors, and the County Technology Office, continued the design, development, testing, and implementation of the Integrated Property Tax System (IPTS).
  - Continued to implement information technology (IT) infrastructure. Launched a new full public facing website and Owner Alert document notification system, began seamless permit transfers from the City of San Diego, and changed our URL from sdarcc.com to sdarcc.gov.
  - All system forms, correspondence and certificates were updated to reflect the newly elected official. Continued with the support of the County's IT outsourcer and a new innovative team of professionals to maintain the ARCC's total IT ecosystem and developed a roadmap for future ARCC systems.
  - Completed 94.7% (34,668 of 36,595) of the microfilm conversion, digitization, and polysulfide treatment services project for the Recorder/County Clerk microfilm rolls (through 1990) of Official Records. Film from 1936–1979 will be digitized to increase access to public information, protect rights, benefit public interests, and maintain institutional transparency and credibility. Completion for conversion and digitization of remaining rolls will continue into Fiscal Year 2023–24.

## 2023–25 Objectives



### Equity

- Economic Opportunity: Dismantle barriers to expanding opportunities in traditionally underserved communities and businesses, especially communities of color and low income.
  - Continue to develop community educational partners and community advisors for traditionally underrepresented populations that transact business with the ARCC.
  - Conduct departmental job fairs and promote student worker program in partnership with San Diego County Human Resources to help underserved communities find job opportunities within the department.



### Sustainability

- Climate: Actively combat climate change through innovative or proven policies, green jobs, sustainable facility construction or maintenance and hazard mitigation.
  - Establish system to collect written or verbal suggestions and feedback from all employees on sustainability initiatives or programs.
  - Provide educational opportunities for employees on sustainability goals and policies so they can ask questions and learn how it relates to the County mission.
  - Communicate with employees about sustainability program updates, successes, and/or opportunities for improvement at a minimum of once a quarter.
  - Incorporate information on sustainability policies, plans, and practices into orientation presentations for all employees, contractors, vendors, and consultants working in the facility.
  - Enhance sustainability through interdisciplinary collaboration and teamwork through ongoing collaboration meetings.



### Community

- Engagement: Inspire civic engagement by providing information, programs, public forums or other avenues that increase access for individuals or communities to use their voice, their vote, and their experience to impact change.
  - Provide the public with services that are of value to them in a competent and professional manner by achieving a customer service rating of at least 95%.
- Partnership: Facilitate meaningful conversations, shared programming, grant opportunities, or other opportunities to maximize resources through community partnerships to benefit the region.



- Increase community partnerships with qualified institutions, such as schools, non-profits, museums, and religious organizations for property tax exemptions through additional outreach and education of the community.
- Increase the number of qualified disabled veterans and their surviving spouses for the Disabled Veterans' Exemption resulting in a total annual taxpayer savings exceeding \$20.0 million in property taxes.
- Continue to provide second Saturday and extended hours to increase services available outside normal business hours to obtain marriage licenses and ceremonies, Fictitious Business Name Statement filings, and vital record copies in the branch offices of the department.

 **Empower**

- Workforce: Invest in our workforce and operations by providing support services and excellent customer service to ensure continuity of operations remains at its best.
  - Ensure 100% of appraiser/audit staff is current on all required training to maintain certifications and ability to properly locate, identify, and assess all property. This will assure the public and businesses a fair and uniform assessment under the auspices of all applicable State property tax laws, rules, and regulations.
  - Examine and process 96% of documents submitted for eRecording within three hours of receipt to provide customers a more efficient and secure recording and document return process.
  - Complete Assessor Continuity of Operations processes to expand on crisis management plan and encompass Disas-

ter Recovery initiatives to ensure our ability to respond to the communities in the region in the event of an emergency.

- Achieve organizational excellence by ensuring a workplace of belonging and inclusion for all County employees as they deliver the County's services to the public. Using information provided in the 2023 ARCC employee engagement survey, work with employees and collaborate with the employee representative groups, to develop action plans that will further improve engagement in the department and continue to foster and develop an engaged and empowered workforce.
- Transparency and Accountability: Maintain program and fiscal integrity through reports, disclosures, and audits.
  - Process 90% of all claims for property tax exemptions or reassessment exclusions within 90 days of application receipt.
- Innovation: Foster new ideas and the implementation of proven best practices to achieve organizational excellence.
  - In coordination with the Auditor and Controller, Treasurer-Tax Collector, Clerk of the Board of Supervisors, and the County Technology Office, continue the design, development, testing, and implementation of the Integrated Property Tax System (IPTS).



### Related Links

For more information on the Assessor/Recorder/County Clerk, refer to the website at:

- ◆ [www.sdarcc.gov](http://www.sdarcc.gov)





| Performance Measures  |   | 2021–22<br>Actuals  | 2022–23<br>Adopted | 2022–23<br>Estimated<br>Actuals | 2023–24<br>Recommended | 2024–25<br>Recommended |
|---|---|---------------------|--------------------|---------------------------------|------------------------|------------------------|
|  | Satisfactory customer service rating <sup>1</sup>   | 99%                 | 95%                | 99%                             | 95%                    | 95%                    |
|   | Qualified disabled veterans and their surviving spouses for the Disabled Veterans' Exemption <sup>6</sup>       | N/A                 | N/A                | N/A                             | 14,500                 | 15,000                 |
|  | Mandated assessments completed by close of annual tax roll <sup>2</sup>   | 100%<br>of 198,942  | 100%               | 100%<br>of 162,333              | N/A                    | N/A                    |
|   | Appraiser/audit staff current on all required training <sup>3</sup>   | 100%<br>of 136      | 100%               | 100%<br>of 142                  | 100%                   | 100%                   |
|   | Examine and process all documents submitted for eRecording within three hours of receipt <sup>4</sup>           | 81.1%<br>of 535,169 | 96%                | 99.2%<br>of 257,201             | 96%                    | 96%                    |
|   | Property tax exemptions or reassessment exclusions processed within 90 days of application receipt <sup>5</sup> | N/A                 | N/A                | N/A                             | 90%                    | 90%                    |

**Table Notes**

- <sup>1</sup> The customer satisfaction rating measures how individuals perceive the department’s ability to provide services of value to them. This rating reflects the percentage of survey questions in which customers indicated at least a satisfactory rating.
- <sup>2</sup> Measures the performance in locating, identifying and fairly and uniformly appraising all property. Completion of the annual assessment work is the County’s first step to assessing and billing annual property taxes. Effective July 1, 2023, this will no longer be measured.
- <sup>3</sup> Measures the number of appraiser/audit staff current on all required training to maintain certifications and ability to properly locate, identify, and assess all property. This assured the public and businesses a fair and uniform assessment under the auspices of all applicable State property tax laws, rules and regulations.
- <sup>4</sup> Measures the timely manner in which the public can access ownership information to facilitate the buying, selling and financing of property.
- <sup>5</sup> Measures the timely processing of claims for property tax exemptions or reassessment exclusions. New measure effective July 1, 2023.
- <sup>6</sup> The number of disabled veterans and their surviving spouses qualified for the Disabled Veterans' Exemption result to property tax savings.

## Recommended Budget Changes and Operational Impact: 2022–23 to 2023–24

### Staffing

Increase of 2.00 staff years

- ◆ Increase of 2.00 staff years in Recorder/County Clerk to provide program support for technology projects and re-engineering processes to increase the capability to respond and recover operations to meet the immediate needs of individuals, families and the region.

### Expenditures

Net increase of \$8.2 million

- ◆ Salaries & Benefits—increase of \$3.1 million primarily due to negotiated labor agreements and staffing changes noted above.

- ◆ Services & Supplies—increase of \$5.2 million is primarily due to the contract costs related to the replacement of the Integrated Recorder and Vital Records System; digitization and indexing of pre-1980 records; conservation, treatment and transfer of ARCC records from the San Diego History Center; increase in printing costs associated with information on homeowners' values; and IT contract costs for AppXtender Upgrade and Captiva replacement.
- ◆ Operating Transfers—decrease of \$0.1 million due to cancellation of building a roof to protect specialized equipment at the East County Office and Archives.

### Revenues

Net increase of \$8.2 million

- ◆ Licenses, Permits and Franchises—net increase of \$1.7 million due to increased number of marriage licenses issued and increased fees for services.
- ◆ Charges for Current Services—net increase of \$4.3 million.



- ❖ Increase of \$5.8 million in Recorder Trust Fund revenues due to contract services related to the replacement of the Integrated Recorder and Vital Records System, digitization and indexing of pre-1980 records, and conservation, treatment and transfer of ARCC records from the San Diego History Center and associated personnel costs.
- ❖ Increase of \$1.4 million in AB 2890 Recovered Costs revenue to align with anticipated supplemental assessment revenues.
- ❖ Increase of \$0.7 million in Property Tax System Administration revenue related to support of the property tax system.
- ❖ Increase of \$0.5 million in Filing Documents and Notary Public Fees due to increased fees for services.
- ❖ Increase of \$0.5 million in Recording Fees due to increased number of vital records provided to customers.
- ❖ Increase of \$0.4 million in Marriage Ceremony Fees due to increased number of ceremonies performed.

- ❖ Decrease of \$5.0 million in Recording Document and Duplicating and Filing Fees due to fewer recording and filing documents resulting from the increased interest rates in the real estate market.
- ❖ Fund Balance Component Decreases—increase of \$0.2 million for a total budget of \$1.7 million for one-time negotiated salary and benefit payments and ARCC portion of departmental costs of the County's existing pension obligation bond (POB) debt.
- ❖ Use of Fund Balance—decrease of \$1.2 million associated with prior year one-time negotiated labor costs.
- ❖ General Purpose Revenue Allocation—net increase of \$3.2 million primarily due to negotiated labor agreements.

### Recommended Budget Changes and Operational Impact: 2023–24 to 2024–25

Net decrease of \$2.5 million primarily due to the completion of various projects, offset by increased costs for negotiated labor agreements and anticipated capital equipment purchases.





| Staffing by Program   |   |   |   |             |   |
|-----------------------|---|---|---|-------------|---|
|                       | Fiscal Year<br>2021–22<br>Adopted<br>Budget | Fiscal Year<br>2022–23<br>Adopted<br>Budget | Fiscal Year<br>2023–24<br>Recommended<br>Budget | %<br>Change | Fiscal Year<br>2024–25<br>Recommended<br>Budget |
| Property Valuation ID | 267.75                                      | 281.75                                      | 280.75  | (0.4)       | 280.75  |
| Recorder/County Clerk | 120.75                                      | 133.75                                      | 135.75  | 1.5         | 135.75  |
| Management Support    | 31.00                                       | 31.00                                       | 32.00   | 3.2         | 32.00   |
| <b>Total</b>          | <b>419.50</b>                               | <b>446.50</b>                               | <b>448.50</b>                                   | <b>0.4</b>  | <b>448.50</b>                                   |

| Budget by Program     |   |   |   |             |   |
|-----------------------|---|---|---|-------------|---|
|                       | Fiscal Year<br>2021–22<br>Adopted<br>Budget | Fiscal Year<br>2022–23<br>Adopted<br>Budget | Fiscal Year<br>2023–24<br>Recommended<br>Budget | %<br>Change | Fiscal Year<br>2024–25<br>Recommended<br>Budget |
| Property Valuation ID | \$ 43,520,470                               | \$ 44,209,228                               | \$ 48,072,698                                   | 8.7         | \$ 47,679,953                                   |
| Recorder/County Clerk | 27,413,775                                  | 26,909,689                                  | 31,853,011                                      | 18.4        | 30,384,089                                      |
| Management Support    | 7,871,454                                   | 9,996,230                                   | 9,441,137                                       | (5.6)       | 8,764,590                                       |
| <b>Total</b>          | <b>\$ 78,805,699</b>                        | <b>\$ 81,115,147</b>                        | <b>\$ 89,366,846</b>                            | <b>10.2</b> | <b>\$ 86,828,632</b>                            |

| Budget by Categories of Expenditures |   |   |   |             |   |
|--------------------------------------|---|---|---|-------------|---|
|                                      | Fiscal Year<br>2021–22<br>Adopted<br>Budget | Fiscal Year<br>2022–23<br>Adopted<br>Budget | Fiscal Year<br>2023–24<br>Recommended<br>Budget | %<br>Change | Fiscal Year<br>2024–25<br>Recommended<br>Budget |
| Salaries & Benefits                  | \$ 54,370,287                               | \$ 60,244,408                               | \$ 63,381,444                                   | 5.2         | \$ 64,917,763                                   |
| Services & Supplies                  | 24,010,412                                  | 20,795,739                                  | 25,985,402                                      | 25.0        | 20,910,869                                      |
| Capital Assets Equipment             | 425,000                                     | —   | —   | —           | 1,000,000                                       |
| Operating Transfers Out              | —   | 75,000                                      | —   | (100.0)     | —   |
| <b>Total</b>                         | <b>\$ 78,805,699</b>                        | <b>\$ 81,115,147</b>                        | <b>\$ 89,366,846</b>                            | <b>10.2</b> | <b>\$ 86,828,632</b>                            |



| Budget by Categories of Revenues   |   |   |   |             |   |
|------------------------------------|---|---|---|-------------|---|
|                                    | Fiscal Year<br>2021–22<br>Adopted<br>Budget | Fiscal Year<br>2022–23<br>Adopted<br>Budget | Fiscal Year<br>2023–24<br>Recommended<br>Budget | %<br>Change | Fiscal Year<br>2024–25<br>Recommended<br>Budget |
| Licenses Permits & Franchises      | \$ 800,000                                  | \$ 850,000                                  | \$ 2,576,228                                    | 203.1       | \$ 2,576,228                                    |
| Charges For Current Services       | 48,303,696                                  | 48,827,639                                  | 53,092,447                                      | 8.7         | 47,640,372                                      |
| Fund Balance Component Decreases   | 1,539,701                                   | 1,524,090                                   | 1,711,400                                       | 12.3        | 1,374,230                                       |
| Use of Fund Balance                | 900,876                                     | 1,157,761                                   | —   | (100.0)     | —   |
| General Purpose Revenue Allocation | 27,261,426                                  | 28,755,657                                  | 31,986,771                                      | 11.2        | 35,237,802                                      |
| <b>Total</b>                       | <b>\$ 78,805,699</b>                        | <b>\$ 81,115,147</b>                        | <b>\$ 89,366,846</b>                            | <b>10.2</b> | <b>\$ 86,828,632</b>                            |

