

**City Clerk**



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## Description

The 1931 Charter outlined the duties of the City Clerk, and the core functions remain, which include: supporting the legislative body, coordinating municipal elections, serving as the Filing Officer, and managing the City's archives and records management program. Today, the Clerk has built upon these essential services to become a vital access point to local government.

The Clerk has spent almost two decades striving for increased efficiency and embracing continuous improvement. This philosophy has allowed the office to provide the best assistance to its internal and external customers by integrating innovative practices into daily operations. Examples include: the implementation of Records Management templates and signature workflows within Adobe Sign; the creation of an interdepartmental shared drive to streamline the process of accessing legislative meeting files; maximizing access to documents while maintaining file integrity; the creation of an internal webform for City staff to request documents; the use of Get It Done to enable customers to create passport appointments through mobile devices; the creation of a more dynamic Legislative Calendar to consolidate meeting information; and the implementation of a central location for all over-the-counter public services in the lobby of the City Administration Building for easy public access.

During the continued COVID-19 State of Emergency, the Office of the City Clerk has facilitated the evolution of our City Council meetings to a completely virtual environment and now a hybrid environment, offering elected officials, City staff, and members of the public a safe, accessible, and efficient means of conducting and commenting on City business in real-time.

The Clerk continues to implement innovative improvements to the department's business operations. In partnership with Council Administration, Communications Department, Department of Information Technology, Real Estate Assets Department, and Engineering and Capital Projects Department, the Clerk completed an upgrade to the Council Chamber's audio-visual and electronic voting system to improve meeting management and public engagement experience without the use of General Funds.

In addition, the electronic filing system for disclosure documents was updated to a more user-friendly platform for both the filers and public members while creating cost efficiencies. Additionally, in

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collaboration with the Office of Boards and Commissions, an online repository and application system called OnBoard was implemented for the City's Boards and Commissions, allowing the public and the Council to access information in real-time and in a searchable format.

As the City's Elections Official, the City Clerk coordinates the municipal elections. With recent changes to the City Charter and the public's interest in local government involvement, the Clerk's role in municipal elections has become even more critical. In past years, the Office of the City Clerk processed an average of 15-20 candidates and 1-2 petitions. That number increased to over 50 candidates in the last election cycle with a commensurate increase in the number of petitions. Looking ahead, the public's interest is anticipated to grow. The City Clerk is committed to ensuring the department has the resources and staff to meet all legal requirements to keep the process accessible and transparent to the public.

The Clerk's Passport Acceptance Facility has proven to be an enormous success. Since its establishment in 2013, the agency has processed more than 28,000 passport applications. The central location in the lobby of the City Administration Building makes it a valuable resource that is easily accessible and provides an essential service to the residents of San Diego and the region.

The City Clerk has had legal mandates related to Records Management for over 100 years per the 1889 and 1931 Charter. The Records Management Program has been a model nationwide, coordinating the disposition of all City records. As the City continues to enhance internal and external services to the public via new electronic technologies, these emerging technologies have increased the need for an Electronic Records Management System (ERMS)/Trusted Environment to protect and validate the authenticity of official City records. The City Clerk and Department of Information Technology are working collaboratively on a pilot project to create an ERMS/Trusted Environment to effectively comply with ISO standards (International Organization for Standardization), Records Management Policy/Procedures, and California Government Code.

Additionally, the City Clerk's award-winning Archives Access and Preservation Program has allowed for the preservation and digitization of some of the City's most valuable and fragile historical materials, including over 1,000,000 items scanned and uploaded to the City Clerk's Digital Archives. In its ninth year, the Program has been recognized by local historic preservation organizations and the California Records Advisory Board for Archival excellence in long-term preservation and enhanced access to many of the City's rare documents, maps, and historical images. Collections have been expanded to include City Council audio tapes, burial records, silent movies, and the City Clerk's most sought-after collection of San Diego's neighborhoods from the 1970s, the "Street Views." A few notable achievements from the Office of the City Clerk, Archives and Records Management division include the digitization and upload of:

- The remaining 21 years of City Clerk Official Ordinances so that citizens can now complete a seamless search for historical City Ordinances from 1850 to 1970.
- 237 images which captured dam construction from Glass Plate Negatives (1885-1963) and approximately 335 historical images of the City's water infrastructure from 1992 to 1975.

As core services of the department are strengthened and new services are added to enhance transparency, these efforts reflect the commitment of the City Clerk to act as a gateway to local government.

**The vision is:**

To enhance access to local government

**The mission is:**

To provide accurate information and maximize access to municipal government

## Goals and Objectives

**Goal 1: *Customer Service: Provide customers with accurate and thorough responses in a courteous, timely, and user-friendly manner.***

- Be a reliable resource for obtaining and preserving information.
- Continue to provide and enhance a central resource center that is easily accessible to the public and City departments.
- Accurately and timely respond to 1,590 records requests while maintaining traceability.
- Respond to Mayoral & Council requests for assistance with Records Management-related matters within 24 hours.
- Upload the Results Summary of the Council meetings and all late-arriving (SB 343) documents within 48 hours of the close of the meeting.
- Make the City Council meeting agendas and supporting materials available to the public five days prior to a regularly scheduled Council meeting and provide email updates of all agenda revisions and updates prior to the start of the Council meetings.

**Goal 2: *Functionality: Embrace cutting-edge technology and industry best practices to enhance efficiency, transparency, and accessibility.***

- Continue to expand electronic filing options within the City of San Diego where appropriate.
- Use technology to enhance customer experience.
- Use innovative technology to enhance record-keeping capabilities.
- Provide better search options and expanded content via the Digital Archives for customer interface.
- Provide user-friendly online passport appointment scheduling.

**Goal 3: *Legal Requirements: Adhere to state and local mandates and deadlines related to city government.***

- Effectively administer and coordinate municipal elections and citizen petition processes fairly, neutrally, and impartially.
- Comply with Brown Act noticing requirements by making City Council meeting agendas, supporting materials, minutes, late-arriving (SB 343) materials, and Closed Session agendas public and readily available.
- Make supplemental agenda items and supporting materials available to the public at least 72 hours prior to the Council meeting.
- Provide effective maintenance and oversight of the City's Master Record Schedule and Department Retention File Plans to ensure all City business functions and records series are identified and legal codes for retention are cited.
- Provide records management training to departments, Records Coordinators, Council, and Mayoral staff on policies and procedures pertinent to legislative and regulatory compliance of City records. Provide training for Department Directors on the City Archives legal guidelines, policies, and procedures for the proper management of historical records and escalated preservation.

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- Serve as the filing officer to the City's campaign finance disclosure reports, statements of economic interest, municipal lobbyist registrations and reports, and other reports as required by the FPPC.

**Goal 4: *Serving Our City: Facilitate and coordinate specific City legislative-, election- and records-related actions and proceedings professionally and cooperatively.***

- Work collaboratively with City departments, agencies, boards, and commissions to ensure they meet conflict of interest requirements.
- Coordinate the noticing, oath of office, and tracking process for the City's boards and commissions. Coordinate with City departments to ensure official city records are identified for transfer to the Archives and Records Management, Records Center.
- Partner with schools, colleges, retired citizens, graduates, and other organizations to support the Citywide Volunteer Program to provide volunteers with opportunities to assist with various City Clerk Archive projects.
- Assist in facilitating smooth and seamless City Council meetings, which offer maximum public input and participation opportunities.
- Provide reports and information at various Council and Committee meetings on topics related to the Department's core services.
- Seek out access improvements to Council Chambers to maximize participation by all customer groups and minimize any challenges based on language barriers or as identified by the Office of ADA Compliance and Accessibility.

## Key Performance Indicators

Performance Indicator	FY2021 Target	FY2021 Actual	FY2022 Target	FY2022 Actual	FY2023 Target
Percentage of customer service provided with accurate and thorough responses in a courteous, timely, and user-friendly manner <sup>1</sup>	96%	95%	95%	89%	90%
Percentage of cutting-edge technology and industry best practices that enhanced efficiency, transparency, and accessibility	96%	99%	98%	99%	99%
Percentage of legal requirements adhered to including State and local mandates and deadlines relating to city government	100%	100%	100%	100%	100%
Percentage of specific City legislative-, election- and records-related actions and proceedings professionally facilitated and coordinated	100%	100%	100%	100%	100%

1. Public records requests have increased in volume and complexity, requiring significant research to identify and locate documents. This increased complexity, combined with logistical challenges caused by the COVID-19 pandemic and staffing shortages has increased response time. All requesters receive acknowledgement of request either the same day or next business day and are kept apprised of staff efforts to locate and retrieve documents.

## Department Summary

	FY2021 Actual	FY2022 Budget	FY2023 Adopted	FY2022-2023 Change
FTE Positions (Budgeted)	47.32	47.32	50.32	3.00
Personnel Expenditures	\$ 4,774,448	\$ 5,339,405	\$ 5,781,720	\$ 442,315
Non-Personnel Expenditures	1,134,188	1,414,979	1,169,964	(245,015)
<b>Total Department Expenditures</b>	<b>\$ 5,908,636</b>	<b>\$ 6,754,384</b>	<b>\$ 6,951,684</b>	<b>\$ 197,300</b>
<b>Total Department Revenue</b>	<b>\$ 57,902</b>	<b>\$ 135,582</b>	<b>\$ 158,934</b>	<b>\$ 23,352</b>

## General Fund

### Department Expenditures

	FY2021 Actual	FY2022 Budget	FY2023 Adopted	FY2022-2023 Change
City Clerk	\$ 2,333,205	\$ 2,647,818	\$ 2,484,174	\$ (163,644)
Elections & Information Services	772,300	805,235	694,743	(110,492)
Legislative Services	1,940,992	2,197,627	2,241,782	44,155
Records Management	862,139	1,103,704	1,530,985	427,281
<b>Total</b>	<b>\$ 5,908,636</b>	<b>\$ 6,754,384</b>	<b>\$ 6,951,684</b>	<b>\$ 197,300</b>

### Department Personnel

	FY2021 Budget	FY2022 Budget	FY2023 Adopted	FY2022-2023 Change
City Clerk	6.50	9.50	9.50	0.00
Elections & Information Services	11.50	8.50	8.50	0.00
Legislative Services	18.32	18.32	18.32	0.00
Records Management	11.00	11.00	14.00	3.00
<b>Total</b>	<b>47.32</b>	<b>47.32</b>	<b>50.32</b>	<b>3.00</b>

### Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>Support for Records Management Program</b> Addition of 1.00 Program Manager and 2.00 Senior Management Analysts to be reclassified to Senior Records Analysts to support the City of San Diego's Records Management Program.	3.00	\$ 360,777	-
<b>Salary and Benefit Adjustments</b> Adjustments to reflect savings resulting from vacant positions for any period of the fiscal year, retirement contributions, retiree health contributions, and labor negotiations.	0.00	70,194	-
<b>Pay-in-Lieu of Annual Leave Adjustments</b> Adjustment to expenditures associated with projected compensation in-lieu of the use of annual leave.	0.00	10,292	-
<b>Non-Standard Hour Personnel Funding</b> Funding allocated according to a zero-based annual review of hourly funding requirements.	0.00	1,052	-

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## Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>Support for Information Technology</b> Adjustment to expenditure allocations according to a zero-based annual review of information technology funding requirements.	0.00	(80,984)	-
<b>Non-Discretionary Adjustment</b> Adjustment to expenditure allocations that are determined outside of the department's direct control. These allocations are generally based on prior year expenditure trends and examples of these include utilities, insurance, and rent.	0.00	(164,031)	-
<b>One-Time Additions and Annualizations</b> Adjustment to reflect one-time revenues and expenditures, and the annualization of revenues and expenditures, implemented in Fiscal Year 2022.	0.00	-	50,000
<b>Revised Revenue from New/Revised User Fees</b> Adjustment to reflect anticipated User Fee revenue increase from the implementation of new and/or revised user fees.	0.00	-	23,352
<b>Reduction of Passport Revenue</b> Reduction of one-time revenue associated with the Passport Services Program due to limited services to the public as a result of the COVID-19 State of Emergency.	0.00	-	(50,000)
<b>Total</b>	<b>3.00 \$</b>	<b>197,300 \$</b>	<b>23,352</b>

## Expenditures by Category

	FY2021 Actual	FY2022 Budget	FY2023 Adopted	FY2022-2023 Change
<b>PERSONNEL</b>				
Personnel Cost	\$ 2,559,263	\$ 2,827,617	\$ 3,283,127	\$ 455,510
Fringe Benefits	2,215,185	2,511,788	2,498,593	(13,195)
<b>PERSONNEL SUBTOTAL</b>	<b>4,774,448</b>	<b>5,339,405</b>	<b>5,781,720</b>	<b>442,315</b>
<b>NON-PERSONNEL</b>				
Supplies	\$ 27,421	\$ 127,666	\$ 126,326	\$ (1,340)
Contracts & Services	291,568	333,416	310,466	(22,950)
Information Technology	658,450	640,917	559,933	(80,984)
Energy and Utilities	153,149	308,219	168,478	(139,741)
Other	3,600	4,761	4,761	-
<b>NON-PERSONNEL SUBTOTAL</b>	<b>1,134,188</b>	<b>1,414,979</b>	<b>1,169,964</b>	<b>(245,015)</b>
<b>Total</b>	<b>\$ 5,908,636</b>	<b>\$ 6,754,384</b>	<b>\$ 6,951,684</b>	<b>\$ 197,300</b>

## Revenues by Category

	FY2021 Actual	FY2022 Budget	FY2023 Adopted	FY2022-2023 Change
Charges for Services	\$ 40,615	\$ 123,782	\$ 142,354	\$ 18,572
Fines Forfeitures and Penalties	60	1,000	1,000	-
Licenses and Permits	13,324	10,800	15,580	4,780
Other Revenue	92	-	-	-
Rev from Other Agencies	47	-	-	-
Transfers In	3,763	-	-	-
<b>Total</b>	<b>\$ 57,902</b>	<b>\$ 135,582</b>	<b>\$ 158,934</b>	<b>\$ 23,352</b>

**Personnel Expenditures**

Job Number	Job Title / Wages	FY2021 Budget	FY2022 Budget	FY2023 Adopted	Salary Range	Total
<b>FTE, Salaries, and Wages</b>						
20000012	Administrative Aide 1	1.00	1.00	0.00	\$ 45,269 - 54,528	\$ -
20000024	Administrative Aide 2	4.00	4.00	5.00	52,142 - 62,833	299,808
20000119	Associate Management Analyst	7.00	7.00	7.00	66,197 - 79,990	505,022
20001106	City Clerk	1.00	1.00	1.00	42,047 - 251,127	220,500
90000539	Clerical Assistant 2	0.15	0.15	0.15	36,630 - 44,147	5,495
20000370	Deputy City Clerk 1	17.00	16.00	15.00	38,409 - 46,381	673,150
20000371	Deputy City Clerk 2	4.00	5.00	5.00	44,087 - 53,354	263,221
20001168	Deputy Director	3.00	3.00	3.00	56,929 - 209,339	488,250
20000293	Information Systems Analyst 3	1.00	1.00	1.00	73,375 - 88,725	88,725
20000347	Legislative Recorder 2	4.00	4.00	4.00	50,810 - 61,486	245,944
90000347	Legislative Recorder 2	0.17	0.17	0.17	50,810 - 61,486	8,638
20000172	Payroll Specialist 1	1.00	1.00	1.00	44,646 - 53,732	44,646
20001234	Program Coordinator	1.00	0.00	0.00	34,070 - 167,127	-
20001222	Program Manager	0.00	1.00	2.00	56,929 - 209,339	233,628
20000779	Public Information Specialist	1.00	1.00	1.00	38,409 - 46,381	46,381
20000015	Senior Management Analyst	0.00	0.00	2.00	72,664 - 87,865	145,328
20000950	Stock Clerk	1.00	1.00	2.00	35,024 - 42,270	77,294
20000955	Storekeeper 1	1.00	1.00	1.00	40,339 - 48,380	40,339
	Bilingual - Regular					14,560
	Budgeted Personnel					(158,678)
	Expenditure Savings					
	Overtime Budgeted					10,116
	Vacation Pay In Lieu					30,760
<b>FTE, Salaries, and Wages Subtotal</b>		<b>47.32</b>	<b>47.32</b>	<b>50.32</b>		<b>\$ 3,283,127</b>

	FY2021 Actual	FY2022 Budget	FY2023 Adopted	FY2022-2023 Change
<b>Fringe Benefits</b>				
Employee Offset Savings	\$ 19,425	\$ 20,684	\$ 23,292	\$ 2,608
Flexible Benefits	538,870	568,788	564,150	(4,638)
Insurance	1,075	-	-	-
Long-Term Disability	11,472	11,085	11,291	206
Medicare	39,556	40,366	47,013	6,647
Other Post-Employment Benefits	270,406	275,895	267,383	(8,512)
Retiree Medical Trust	2,254	2,670	4,066	1,396
Retirement 401 Plan	1,989	2,253	6,511	4,258
Retirement ADC	1,098,573	1,316,191	1,283,903	(32,288)
Retirement DROP	11,813	11,728	7,159	(4,569)
Risk Management Administration	44,513	47,745	54,755	7,010
Supplemental Pension Savings Plan	149,917	169,799	174,764	4,965
Unemployment Insurance	3,874	4,024	4,104	80
Workers' Compensation	21,447	40,560	50,202	9,642
<b>Fringe Benefits Subtotal</b>	<b>\$ 2,215,185</b>	<b>\$ 2,511,788</b>	<b>\$ 2,498,593</b>	<b>\$ (13,195)</b>
<b>Total Personnel Expenditures</b>			<b>\$ 5,781,720</b>	