

City Clerk



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Department Description

The Office of the City Clerk has built on core services in order to expand its role of providing public access infrastructure. The Office offers San Diego residents a vital access-point to local government. Legislative documents, such as City Council agendas, are available both in the office and online, with all supporting or exhibit material included for ease of access. The Summary Sheet, Results, and Minutes that capture the actions by the legislative body are also available online and organized by Council meeting. In addition, campaign finance disclosure, lobbyist reports, and statements of economic interests are retained and available for public inspection. The City Clerk is the filing officer for the City and administers municipal elections, coordinates public hearings, and disseminates information regarding legislative actions and policy decisions to City departments, other agencies, and the public. As the official record keeper, the City Clerk maintains custody of City records.

The Office's mission is:

To provide accurate information and maximize access to municipal government

Goals and Objectives

The following goals and objectives represent the action plan for the Office:

Goal 1: Provide support to the Mayor and City Council as they work to serve the residents of San Diego

Every division within the Office of the City Clerk strives to support the Mayor and City Council as they work to serve the residents of San Diego. One important way of accomplishing this is by providing public access infrastructure to information relating to the legislative process. Over the next one to two years, the Office will continue to accomplish this goal by focusing on the following objectives:

- Prepare and distribute docket materials in a timely, efficient, and streamlined manner with an emphasis on electronic access initiatives that increase information availability while reducing cost where possible
- Continue to streamline the Council docket to provide more concise, yet thorough and informative, docket entries to the public to increase public participation

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- Effectively coordinate and administer public hearings, the resolutions and ordinances database, and Proposition 218 protest processes

Goal 2: Administer municipal elections and serve as filing officer for the City of San Diego

Proper administration of the election process serves the people's right to exercise their vote by ensuring an expeditious, complete process. The timely and accurate handling of disclosure documents provides another example of the ways in which the Office of the City Clerk acts as a critical, foundational source for information. Over the next one to two years, the Office will continue to accomplish this goal by focusing on the following objectives:

- Effectively administer and coordinate municipal elections
- Serve as filing officer by processing the City's campaign finance disclosure reports, statements of economic interests, and lobbyist registrations and reports
- Effectively support the election/appointment process for board and commission members

Goal 3: Provide access to the City's official record and legislative documents in as many different media as possible in order to reach the broadest possible customer base

The Office of the City Clerk provides the foundation for access to information in the City of San Diego. To this end, the Office is dedicated to seeking out and incorporating best practices with regard to information storage and retrieval. Over the next one to two years, the Office will move toward accomplishing this goal by focusing on the following objectives:

- Maintain and preserve City Council proceedings and related documents (e.g., minutes, result sheets, resolutions/ordinances, contracts/agreements, and leases/deeds/change orders)
- Expand electronic filing options within the City of San Diego where appropriate
- Apply technology effectively to provide increased and improved access to materials online
- Utilize the social media outlets of Twitter and Facebook to provide timely updates on Council actions; improve access to City-related information by placing forms and important filing deadlines online through the Office of the City Clerk website; and expand the number of followers tracking City actions

Goal 4: Support the City's records management program

A viable records management program ensures that each department can maximize its operational goals by making information more readily available for service delivery. Over the next one to two years, the Office will move toward accomplishing the goal by focusing on the following objectives:

- Work closely with department directors to update their records disposition schedules in order to assist them in retaining and organizing records for optimal operation and access by the public
- Preserve and make accessible the extremely fragile and priceless Pioneer Statehood records of San Diego (many from the 1850s) as part of a larger archives assessment and reorganization
- Provide records management training to educate all City staff on records management principles, best practices, government codes, and governing policies to facilitate legislative and regulatory compliance of City records

Goal 5: Manage public access infrastructure and epitomize effective customer service

The Office of the City Clerk is an independent office known for its impartiality, integrity, and exceptional customer service based on its ever-increasing ability to provide the public access to municipal government in an efficient, timely, professional, and courteous manner via the latest technology available. Over the next one or two years, the Office will move toward accomplishing this goal by focusing on the following objectives:

- Utilize best business practices for effective service delivery and apply flexibility to resource allocation across divisions
- Apply technology effectively to provide increased and improved access to materials online and increase staff's ability to respond quickly and accurately to customer requests
- Realize efficiencies by coordinating activities and standardizing processes across the City
- Ensure a high level of integrity and honesty in performance of work duties
- Improve public access to pertinent City information by expanding outreach efforts, including utilizing social media outlets, such as Twitter and Facebook

Goal 6: Train for improved interdepartmental communication and efficiencies

The Office of the City Clerk is involved in almost every aspect of City business by bridging the legislative and executive sides of government. Over the next one to two years, the Office will move toward accomplishing this goal by focusing on the following objectives:

- Provide appropriate training to both executive and legislative entities in the areas of records management, conflict of interest code update, statements of economic interests, and accessing online legislative resources provided by the Office
- Communicate effectively across the City utilizing Cable 24 to televise Council Docket information, records management training videos, and group presentations on a variety of topics to reach the largest audience in the most efficient manner

Key Performance Indicators

Performance Measure	Actual FY2013	Actual FY2014	Target FY2015
1. Level of public outreach achieved	92%	95%	95%
2. Percent of current legislative and election-related records made viewable online within a specified timeframe	99%	99%	95%
3. Percent of historical legislative and election-related records made viewable online within a fiscal year	100%	99%	100%
4. Number of hours of training provided to City staff within the fiscal year ¹	202	306	273

1. Training hours driven, in part, by external/occasional circumstances, such as special elections, conflict of interest code updates, etc.

Service Efforts and Accomplishments

With an emphasis on customer service, Legislative Services continues to work toward a long-standing Office goal of emphasizing electronic access initiatives in order to increase information availability to its customers. Improvements have been made to the service delivery of a variety of legislative documents, including the City Council docket. Council members now use touch screen tablets to access docket materials online during Council meetings. In the fall of Fiscal Year 2015, late-arriving (Senate Bill 343) docket materials are slated to be added to the searchable docket exhibit material available online, and access to historical docket information will be at the most transparent and complete level of accessibility in the City's history. In keeping with an emphasis on transparency, there has been a significant reduction in the time it takes to post the results of City Council actions online and to docket the minutes for Council approval.

Reflecting the breadth of City Clerk responsibilities, multiple petitions were accepted and processed through the Elections & Information Services Division during Fiscal Year 2014, with more scheduled for potential filing during Fiscal Year 2015, in addition to the coordination and support of the November general election.

Echoing the Office's goal of enhanced access, training was provided for dozens of City staff serving as department, agency, and board or commission liaisons for the annual filing of statements of economic interests. Training for the biennial conflict of interest code updates began in late Fiscal Year 2014; staff will assist with docketing revised codes by mid-Fiscal Year 2015. With an emphasis on public access, campaign disclosure statements and lobbyist registrations and reports were posted online. Over 2,000 requests for information and assistance came to the Office from a variety of sources and helped focus core services and resource allocations.

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Providing accurate information and greater access to municipal government has its foundation in a viable Records Management program, which helps to facilitate the efficient administration of City records. In support of this tenet, the administrative regulation that outlines the responsibility of the City Clerk and all City departments for the systematic identification and preservation of the City's vital records will be updated in early Fiscal Year 2015. In addition, the Records Division has embarked on a transition from the current Office-specific records disposition schedules to building a more streamlined Master Records Retention Schedule, which is still a work in progress. Records training is a vital part of ensuring that City staff and department Records Coordinators are informed about new records technologies and best practices, policies, and procedures so that staff can effectively manage City records to ensure compliance with local, State, and federal laws and regulations. With the goal of enhancing training availability, the use of webinars will be expanded in Fiscal Year 2015, since they have proven to be an effective method for reducing cost, leveraging limited staff, and reaching a wider audience citywide. In addition, by the spring of Fiscal Year 2015, the Records Division webpage will be updated and expanded with additional content in the form of videos, pre-recorded webinars, FAQs, and informational articles to advance the objective of assisting City staff in the administration of City records. Further improvements will include an Employee Learning and Development Training module, which will streamline the registration process and track hours related to annual Records Management trainings.

In addition, the Archives Access and Preservation Project will be entering its second year in Fiscal Year 2015. Plans include the digitization of fifty (50) foundational books to be placed online for public access. This will be part of a new online Digital Archives where citizen will be able to research numerous browsable collections of interest and non-circulated historical documents.

Further, the Office completed the first year of its partnership with the United States Department of State as a Passport Acceptance Facility on June 30, 2014. Passport agents on the Clerk's staff process applications for passport books and cards and provide passport photo services as needed, by appointment and to walk-in customers, at a convenient downtown location. The Clerk also holds monthly Passport Fairs in conjunction with the naturalization ceremonies locally administered by the United States Department of Homeland Security. Currently, on average, over 100 passport applicants utilize the Clerk's services each month.

Finally, the City Clerk continues to look for creative and cost-effective ways of improving service. The Office has a robust volunteer program, benefitting from over 5,500 hours of volunteer service each year, which is almost equivalent to three full-time staff members.

Department Summary

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
FTE Positions (Budgeted)	45.12	45.28	45.28	0.00
Personnel Expenditures	\$ 3,709,589	\$ 4,137,582	\$ 4,085,591	\$ (51,991)
Non-Personnel Expenditures	918,659	1,177,125	1,255,665	78,540
Total Department Expenditures	\$ 4,628,248	\$ 5,314,707	\$ 5,341,256	\$ 26,549
Total Department Revenue	\$ 17,192	\$ 18,404	\$ 42,404	\$ 24,000

General Fund

Department Expenditures

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
City Clerk	\$ 1,290,026	\$ 1,586,905	\$ 1,761,601	\$ 174,696
Elections & Information Services	893,516	953,376	896,438	(56,938)
Legislative Services	1,539,315	1,763,846	1,664,386	(99,460)
Records Management	905,391	1,010,580	1,018,831	8,251
Total	\$ 4,628,248	\$ 5,314,707	\$ 5,341,256	\$ 26,549

Department Personnel

	FY2013 Budget	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
City Clerk	3.12	4.28	5.78	1.50
Elections & Information Services	12.00	12.00	10.50	(1.50)
Legislative Services	20.00	19.00	19.00	0.00
Records Management	10.00	10.00	10.00	0.00
Total	45.12	45.28	45.28	0.00

Significant Budget Adjustments

	FTE	Expenditures	Revenue
Equipment/Support for Information Technology Adjustment to expenditure allocations according to a zero-based annual review of information technology funding requirements and priority analyses.	0.00	\$ 32,648	\$ -
Non-Discretionary Adjustment 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	29,042	-
Records Management Adjustment to reflect the addition of non-personnel expenditures for the operation and maintenance of the Records Management Division.	0.00	14,150	-
Passport Acceptance Facility Adjustment to reflect the addition of non-personnel expenditures and revenue for operational support of the Passport Acceptance Facility.	0.00	2,700	24,000

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Significant Budget Adjustments (Cont'd)

	FTE	Expenditures	Revenue
Non-Standard Hour Personnel Funding	0.00	1,366	-
Adjustment to expenditures according to a zero-based annual review of non-standard hour personnel funding requirements.			
Salary and Benefit Adjustments	0.00	(53,357)	-
Adjustments to reflect the annualization of the Fiscal Year 2014 negotiated salary compensation schedule, changes to savings resulting from positions to be vacant for any period of the fiscal year, retirement contributions, retiree health contributions, and labor negotiation adjustments.			
Total	0.00	\$ 26,549	\$ 24,000

Expenditures by Category

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014-2015 Change
PERSONNEL				
Personnel Cost	\$ 2,143,818	\$ 2,337,456	\$ 2,280,506	\$ (56,950)
Fringe Benefits	1,565,771	1,800,126	1,805,085	4,959
PERSONNEL SUBTOTAL	3,709,589	4,137,582	4,085,591	(51,991)
NON-PERSONNEL				
Supplies	\$ 63,052	\$ 100,611	\$ 109,841	\$ 9,230
Contracts	105,209	151,531	154,320	2,789
Information Technology	537,472	680,881	713,529	32,648
Energy and Utilities	86,185	105,495	114,858	9,363
Other	4,532	161	4,761	4,600
Transfers Out	122,209	138,446	158,356	19,910
NON-PERSONNEL SUBTOTAL	918,659	1,177,125	1,255,665	78,540
Total	\$ 4,628,248	\$ 5,314,707	\$ 5,341,256	\$ 26,549

Revenues by Category

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014-2015 Change
Charges for Services	\$ 10,675	\$ 12,302	\$ 37,203	\$ 24,901
Fines Forfeitures and Penalties	-	2,802	1,000	(1,802)
Licenses and Permits	6,400	3,300	4,201	901
Other Revenue	117	-	-	-
Total	\$ 17,192	\$ 18,404	\$ 42,404	\$ 24,000

Personnel Expenditures

Job Number	Job Title / Wages	FY2013 Budget	FY2014 Budget	FY2015 Adopted	Salary Range	Total
FTE, Salaries, and Wages						
20000012	Administrative Aide 1	1.00	1.00	0.00	\$36,962 - \$44,533	\$ -
20000024	Administrative Aide 2	3.00	3.00	4.00	42,578 - 51,334	191,472
20000119	Associate Management Analyst	6.00	6.00	6.00	54,059 - 65,333	370,550
20001106	City Clerk	1.00	1.00	1.00	34,694 - 207,210	138,000
20000539	Clerical Assistant 2	2.00	0.00	0.00	29,931 - 36,067	-
90000539	Clerical Assistant 2 - Hourly	0.06	0.00	0.12	29,931 - 36,067	3,592
20000370	Deputy City Clerk 1	17.00	18.00	18.00	32,968 - 39,811	671,325

Personnel Expenditures (Cont'd)

Job Number	Job Title / Wages	FY2013 Budget	FY2014 Budget	FY2015 Adopted	Salary Range	Total
90000370	Deputy City Clerk 1 - Hourly	0.00	0.28	0.00	32,968 - 39,811	-
20000371	Deputy City Clerk 2	2.00	2.00	2.00	37,835 - 45,781	45,781
20001168	Deputy Director	3.00	3.00	3.00	46,966 - 172,744	319,227
20000293	Information Systems Analyst 3	0.00	1.00	1.00	59,363 - 71,760	71,760
20000347	Legislative Recorder 2	5.00	5.00	5.00	43,618 - 52,770	243,538
90000347	Legislative Recorder 2 - Hourly	0.06	0.00	0.16	43,618 - 52,770	6,979
20000172	Payroll Specialist 1	1.00	1.00	1.00	33,093 - 39,832	39,832
20000927	Senior Clerk/Typist	1.00	1.00	1.00	36,067 - 43,514	43,514
20000950	Stock Clerk	2.00	1.00	1.00	30,056 - 36,275	36,275
20000955	Storekeeper 1	0.00	1.00	1.00	34,611 - 41,517	34,611
20000756	Word Processing Operator	1.00	1.00	1.00	31,491 - 37,918	37,918
	Bilingual - Regular					16,016
	Overtime Budgeted					10,116
FTE, Salaries, and Wages Subtotal		45.12	45.28	45.28		\$ 2,280,506
		FY2013 Actual	FY2014 Budget	FY2015 Adopted		FY2014-2015 Change
Fringe Benefits						
	Employee Offset Savings	\$ 24,525	\$ 33,713	\$ 27,664		\$ (6,049)
	Flexible Benefits	264,745	314,903	338,023		23,120
	Insurance	265	-	-		-
	Long-Term Disability	12,586	12,427	7,757		(4,670)
	Medicare	28,661	30,680	31,442		762
	Other Post-Employment Benefits	274,193	274,604	266,904		(7,700)
	Retiree Medical Trust	89	99	174		75
	Retirement 401 Plan	348	398	375		(23)
	Retirement ADC	730,022	885,423	907,302		21,879
	Retirement DROP	12,106	13,331	8,381		(4,950)
	Retirement Offset Contribution	5,320	-	-		-
	Risk Management Administration	43,976	41,668	41,668		-
	Supplemental Pension Savings Plan	106,956	116,517	113,890		(2,627)
	Unemployment Insurance	6,411	6,599	4,440		(2,159)
	Workers' Compensation	55,570	69,764	57,065		(12,699)
Fringe Benefits Subtotal		\$ 1,565,771	\$ 1,800,126	\$ 1,805,085		\$ 4,959
Total Personnel Expenditures					\$ 4,085,591	



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