

**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 Office has built upon these essential services to become a vital access point to local government.

The Office continues to strive for increased efficiency and embraces 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 developing a more robust Language Access Program; implementing two digital kiosks for Brown Act noticing of City Council, Council Committee, and Boards and Commissions' agendas; implementing a more interactive and user-friendly Legislative Calendar; coordinating with the Department of Information Technology to implement the City of San Diego's first Electronic Records Management System; and continuing to expand the City Clerk's Digital Archives with new archival holdings available to the public. Additionally, the Office of the City Clerk continues to successfully facilitate hybrid City Council meetings, 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.

As the City's Filing Official, the Office continues to utilize and improve upon a modern, user-friendly electronic filing system for disclosure documents, creating cost efficiencies and maximum transparency for public disclosures. Additionally, in partnership with the Office of Boards and Commissions, the Office continues to utilize an online repository and application system called OnBoard to maintain the roster for the City's Boards and Commissions, allowing the public and the Council to access information in real-time and in a searchable format to maximize opportunities for public participation.

As the City's Elections Official, the City Clerk (Interim) coordinates the municipal elections. With increasing public interest in participating in local government, 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 has increased to an average of 30-40 candidates during the 2020 and 2022 election cycle, with a commensurate increase in the number of petitions and other ballot measures. Looking ahead,

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the public's interest is anticipated to grow. The City Clerk (Interim) 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 Passport Acceptance Facility continues to be an enormous success. Since its establishment in 2013, the agency has processed more than 30,000 passport applications and brought in \$1,137,010 to the General Fund. 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 (Interim) 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 Office of the City Clerk and Department of Information Technology have worked collaboratively on a pilot project to create the City's first ERMS/Trusted Environment to effectively comply with ISO standards (International Organization for Standardization), Records Management Policy/Procedures, and California Government Code. Furthermore, we are developing a Records Management "ecosystem" where purpose-built software platforms can work in tandem to provide authority controls over the City's records while offering departments the ability to leverage what is specific to their core function.

Additionally, the Office of 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 Digital Archives. In its tenth 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 Digital Archives 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's archives section include the following:

- The digitization of 1,195 magnetic reel-to-reels to an MP3 format
- Identification of thousands of records with historical significance stored in the Records Center
- Support for school groups learning local civics lessons
- Coordinating a lecture series and exhibition for the 2022 Archives Month Program

As core services of the department are strengthened and new services are added to enhance transparency, these efforts reflect the commitment of the Office 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 information and access to city council meetings, election resources, and historical resources in a courteous, timely, accessible, and user-friendly manner***

- Expanded Language Access Program (LAP)
- Inclusivity in Archives
- Be a reliable resource for obtaining and preserving information
- Remain open to feedback and suggestions for continuous improvement within the department
- Provide a variety of specialized training opportunities designed to enhance customers' understanding of subject matter

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

- Utilize Innovative Software to Enhance Customer Engagement and Streamline Difficult-to-Navigate Processes and Systems with Technological Solutions
- Continue to expand electronic filing options within the City of San Diego where appropriate
- Use technology to enhance customer experience
- Expand historical material available online through the Clerk's digital archives to facilitate user-friendly access and interaction

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

- Ensure transparency and accessibility to public records and notices to all in a timely manner
- Effectively administer and coordinate municipal elections and citizen petition process fairly, neutrally, and impartially
- Comply with Brown Act noticing requirements and make readily available late-arriving materials
- Provide guidance and training to City departments to comply with records-retention guidelines

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

- Conduct Voter Education and Civic Engagement
- Educate Residents on New Citizen Services-Child Act of 2000
- Work collaboratively with City departments, agencies, boards and commissions to ensure conflict of interest requirements are met
- 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 projects
- Provide assistance to facilitate smooth and seamless City Council meetings which offer maximum opportunity for public input and participation

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<b>Budget Equity Impact Statement</b>	
<b>Base Budget</b>	<b>Budget Adjustment</b>
<p><b><i>Is there an opportunity to adjust the department's ongoing Base Budget to address disparity?</i></b></p> <p>Yes</p> <p>1. Redistributing Staff time to further expand our Language Access Program by implementing community outreach efforts to identify the language needs of the community. 2. Focusing on the inclusivity in Archives by expanding our archival displays and collections to include historical insight of our diverse communities. 3. Collaborating with the Registrar of Voters and the Office of Child and Youth success to conduct voter education and civic engagement by working collaboratively in the historically low voter turnout communities of San Diego. 4. Collaborating with the Office of Immigrant Affairs to provide further resources and education to the immigrant community regarding the Child Act of 2000 and other Passport Acceptance Facility resources.</p>	<p><b><i>Do the Budget Adjustments address a disparity?</i></b></p> <p>Yes</p> <p>Budget adjustments will address disparities that align with the following Tactical Equity Plan goals: Customer Service: Provide customers with accurate and thorough information and access to city council meetings, election resources, and historical resources. Functionality: Embrace cutting-edge technology and industry best practices. Budget Adjustment #1: Non-personnel expenditures for Information Technology software to support mandated duties and responsibilities per the San Diego City Charter, San Diego Municipal Code (SDMC) and Council Policy, the citywide master records retention schedule asset management system, and electronic filing software to support California Government Code and SDMC mandated filings. Equity Lens Response #1: Modernizes office procedures and the users' experience. User-friendly experience - enhances the accessible online San Diego Municipal Code (SDMC) with additional hyperlinks to cross reference municipal code sections, maps, and history tables without downloading PDF. Community members and City employees will have the opportunity to search the SDMC to ensure proper Land Use and other governing authority. Software solution has the potential to translate code sections into other languages, such as Spanish, making the SDMC more accessible to those with limited English proficiencies.</p>

## Key Performance Indicators

Performance Indicator	FY2019 Actual	FY2020 Actual	FY2021 Actual	FY2022 Actual	FY2023 Estimate	Goal
Percentage of customer service provided with accurate and thorough responses in a courteous, timely, and user-friendly manner <sup>1</sup>	99%	95%	95%	89%	95%	95%
Percentage of cutting-edge technology and industry best practices that enhanced efficiency, transparency, and accessibility	94%	90%	99%	99%	99%	99%
Percentage of legal requirements adhered to including State and local mandates and deadlines relating to city government	100%	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%	100%

1. Due to COVID 19, operations were limited to one day per week for record retrieval causing delays in retrieving records from the vast number of City storage facilities. This has been addressed during the current fiscal year by increasing record retrievals 3 times per week. This and the increased complexity of requests has caused a delay in completing research requests.

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## Department Summary

	FY2022 Actual	FY2023 Budget	FY2024 Proposed	FY2023-2024 Change
FTE Positions (Budgeted)	47.32	50.32	50.32	0.00
Personnel Expenditures	\$ 4,816,275	\$ 5,781,720	\$ 5,793,365	\$ 11,645
Non-Personnel Expenditures	1,085,602	1,169,964	1,376,347	206,383
<b>Total Department Expenditures</b>	<b>\$ 5,901,878</b>	<b>\$ 6,951,684</b>	<b>\$ 7,169,712</b>	<b>\$ 218,028</b>
<b>Total Department Revenue</b>	<b>\$ 173,026</b>	<b>\$ 158,934</b>	<b>\$ 208,934</b>	<b>\$ 50,000</b>

## General Fund

### Department Expenditures

	FY2022 Actual	FY2023 Budget	FY2024 Proposed	FY2023-2024 Change
City Clerk	\$ 2,420,152	\$ 2,484,174	\$ 3,168,600	\$ 684,426
Elections & Information Services	518,782	694,743	734,633	39,890
Legislative Services	1,950,834	2,241,782	1,910,917	(330,865)
Records Management	1,012,110	1,530,985	1,355,562	(175,423)
<b>Total</b>	<b>\$ 5,901,878</b>	<b>\$ 6,951,684</b>	<b>\$ 7,169,712</b>	<b>\$ 218,028</b>

### Department Personnel

	FY2022 Budget	FY2023 Budget	FY2024 Proposed	FY2023-2024 Change
City Clerk	9.50	9.50	11.50	2.00
Elections & Information Services	8.50	8.50	7.50	(1.00)
Legislative Services	18.32	18.32	17.32	(1.00)
Records Management	11.00	14.00	14.00	0.00
<b>Total</b>	<b>47.32</b>	<b>50.32</b>	<b>50.32</b>	<b>0.00</b>

### Significant Budget Adjustments

	FTE	Expenditures	Revenue
<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	\$ 73,604	-
<b>Software Enhancements</b> Addition of non-personnel expenditures for software to enhance user experience when navigating city documents and support mandated responsibilities per the City Charter and Municipal Code.	0.00	69,650	-
<b>Support for Information Technology</b> Adjustment to expenditure allocations according to an annual review of information technology funding requirements.	0.00	63,129	-



**Significant Budget Adjustments**

	FTE	Expenditures	Revenue
<b>Salary and Benefit Adjustments</b>	0.00	11,289	-
Adjustments to reflect savings resulting from vacant positions for any period of the fiscal year, retirement contributions, retiree health contributions, and labor negotiations.			
<b>Non-Standard Hour Personnel Funding</b>	0.00	356	-
Funding allocated according to a zero-based annual review of hourly funding requirements.			
<b>One-Time Additions and Annualizations</b>	0.00	-	50,000
Adjustment to reflect one-time revenues and expenditures, and the annualization of revenues and expenditures, implemented in Fiscal Year 2023.			
<b>Total</b>	<b>0.00 \$</b>	<b>218,028 \$</b>	<b>50,000</b>

**Expenditures by Category**

	FY2022 Actual	FY2023 Budget	FY2024 Proposed	FY2023-2024 Change
<b>PERSONNEL</b>				
Personnel Cost	\$ 2,470,139	\$ 3,283,127	\$ 3,431,098	\$ 147,971
Fringe Benefits	2,346,136	2,498,593	2,362,267	(136,326)
<b>PERSONNEL SUBTOTAL</b>	<b>4,816,275</b>	<b>5,781,720</b>	<b>5,793,365</b>	<b>11,645</b>
<b>NON-PERSONNEL</b>				
Supplies	\$ 91,157	\$ 126,326	\$ 126,328	\$ 2
Contracts & Services	259,817	310,466	285,061	(25,405)
<i>External Contracts &amp; Services</i>	31,186	61,764	61,764	-
<i>Internal Contracts &amp; Services</i>	228,632	248,702	223,297	(25,405)
Information Technology	533,894	559,933	692,712	132,779
Energy and Utilities	197,134	168,478	267,485	99,007
Other	3,600	4,761	4,761	-
<b>NON-PERSONNEL SUBTOTAL</b>	<b>1,085,602</b>	<b>1,169,964</b>	<b>1,376,347</b>	<b>206,383</b>
<b>Total</b>	<b>\$ 5,901,878</b>	<b>\$ 6,951,684</b>	<b>\$ 7,169,712</b>	<b>\$ 218,028</b>

**Revenues by Category**

	FY2022 Actual	FY2023 Budget	FY2024 Proposed	FY2023-2024 Change
Charges for Services	\$ 151,008	\$ 142,354	\$ 192,354	\$ 50,000
Fines Forfeitures and Penalties	-	1,000	1,000	-
Licenses and Permits	13,234	15,580	15,580	-
Other Revenue	8,783	-	-	-
<b>Total</b>	<b>\$ 173,026</b>	<b>\$ 158,934</b>	<b>\$ 208,934</b>	<b>\$ 50,000</b>

**Personnel Expenditures**

Job Number	Job Title / Wages	FY2022 Budget	FY2023 Budget	FY2024 Proposed	Salary Range	Total
<b>FTE, Salaries, and Wages</b>						
20000012	Administrative Aide 1	1.00	0.00	0.00	\$ 47,504 - 57,220	\$ -
20000024	Administrative Aide 2	4.00	5.00	5.00	54,716 - 65,935	317,357
20001078	Assistant City Clerk	0.00	0.00	1.00	62,941 - 231,483	203,964

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## Personnel Expenditures

Job Number	Job Title / Wages	FY2022 Budget	FY2023 Budget	FY2024 Proposed	Salary Range	Total
20000119	Associate Management Analyst	7.00	7.00	7.00	69,466 - 83,940	557,798
20001106	City Clerk	1.00	1.00	1.00	46,509 - 277,680	231,526
90000539	Clerical Assistant 2 - Hourly	0.15	0.15	0.15	38,439 - 46,327	5,766
20000370	Deputy City Clerk 1	16.00	15.00	15.00	38,409 - 46,381	685,769
20000371	Deputy City Clerk 2	5.00	5.00	5.00	44,087 - 53,354	276,792
20001168	Deputy Director	3.00	3.00	2.00	62,941 - 231,483	334,155
20000293	Information Systems Analyst 3	1.00	1.00	1.00	77,711 - 93,968	98,667
20000347	Legislative Recorder 2	4.00	4.00	4.00	50,810 - 61,486	255,140
90000347	Legislative Recorder 2 - Hourly	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	49,768
20001222	Program Manager	1.00	2.00	2.00	62,941 - 231,483	221,556
20000779	Public Information Specialist	1.00	1.00	1.00	38,409 - 46,381	48,700
20000015	Senior Management Analyst	0.00	2.00	0.00	76,252 - 92,204	-
21000775	Senior Records Management Analyst	0.00	0.00	2.00	76,252 - 92,204	160,130
20000950	Stock Clerk	1.00	2.00	2.00	35,024 - 42,270	88,768
20000955	Storekeeper 1	1.00	1.00	1.00	40,339 - 48,380	50,799
	Bilingual - Regular					13,104
	Budgeted Personnel					(218,175)
	Expenditure Savings					
	Overtime Budgeted					10,116
	Vacation Pay In Lieu					30,760
<b>FTE, Salaries, and Wages Subtotal</b>		<b>47.32</b>	<b>50.32</b>	<b>50.32</b>		<b>\$ 3,431,098</b>

	FY2022 Actual	FY2023 Budget	FY2024 Proposed	FY2023-2024 Change
<b>Fringe Benefits</b>				
Employee Offset Savings	\$ 20,940	\$ 23,292	\$ 17,501	\$ (5,791)
Flexible Benefits	482,114	564,150	505,218	(58,932)
Insurance	1,338	-	-	-
Long-Term Disability	10,505	11,291	13,510	2,219
Medicare	39,094	47,013	49,158	2,145
Other Post-Employment Benefits	245,345	267,383	262,890	(4,493)
Retiree Medical Trust	2,611	4,066	4,825	759
Retirement 401 Plan	2,030	6,511	18,845	12,334
Retirement ADC	1,294,752	1,283,903	1,280,630	(3,273)
Retirement DROP	4,467	7,159	9,031	1,872
Risk Management Administration	43,614	54,755	59,478	4,723
Supplemental Pension Savings Plan	149,046	174,764	80,063	(94,701)
Unemployment Insurance	3,581	4,104	3,952	(152)
Workers' Compensation	46,697	50,202	57,166	6,964
<b>Fringe Benefits Subtotal</b>	<b>\$ 2,346,136</b>	<b>\$ 2,498,593</b>	<b>\$ 2,362,267</b>	<b>\$ (136,326)</b>
<b>Total Personnel Expenditures</b>			<b>\$ 5,793,365</b>	