

**City Clerk**



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## Department Description

From the City's earliest days of government, the City Clerk (Clerk) has played a role. The 1931 Charter outlined the duties of the Clerk, and the core functions of the Office remain, which include the following: supporting the legislative body, coordinating municipal elections, and managing the City's records management program. Today, the Office of the City Clerk has built upon these important services to strengthen its role of being a vital access point to local government.

In recent years, the Clerk has sought additional ways to serve the City's customers. The creative use of social media like Twitter and Facebook has allowed the Clerk to reach more customers. Tweets from Council Chambers provide immediate information about the disposition of an item.

The Clerk's Passport Acceptance Facility has proven to be a success. With its location in the lobby of the City Administration Building, it is a valuable resource that is easily accessible and centrally located.

For the first time, an Archives Access and Preservation Program has allowed the Clerk to preserve and digitize the City's valuable historical material. Each new service builds on the commitment of the City Clerk to act as a centralized resource for access to local government.

The Department's mission is:

*To provide accurate information and maximize access to municipal government*

The Department's vision is:

*To enhance access to local government*

## Did you know?

- On the City Clerk's website, there are more than 6,450 campaign committee disclosure reports available dating back to 2004 and over 7,600 lobbyist registration and disclosure reports dating back to 2007.

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- Since opening its Passport Acceptance Facility in mid-2013, the City Clerk's Office has processed passport applications for more than 5,700 U.S. citizens versus over 3,000 in 2015.
- In the first half of Fiscal Year 2016, the City Clerk's Docketing Team prepared 495 items for Council approval by distributing and uploading over 11,000 pages of backup materials for these items.
- The Council Actions Team processed 368 Council Resolutions and 76 Council Ordinances by uploading 99 percent of those documents within 72 hours of final approval.
- In the first half of Fiscal Year 2016, the City Clerk's Office added a new feature to the information presented on the Council Meeting Dockets page - a link to all SB 343 (late-arriving) documents submitted to the Council for their review just prior to, or during, the City Council meeting which gives the public post-meeting online access to all of the documents submitted to the Council on a particular docketed item.
- In the first half of Fiscal Year 2016, the Clerk's Records Management Division completed a five-year review of over 3,444 record series in an effort to transition from the current Office-specific records disposition schedules to building a more streamlined Master Records Retention Schedule (MRS) for better access by both departments and the public.
- The City Clerk Archives Access and Preservation Project has made great strides in the areas of access. Residents can now access historical material dating back to the 1800's by going online where they can view restored maps and records including some of the City's most valuable holdings such as the 1817 Libro de Ordenanzas book and the 1856 Pueblo Lands Poole map.

## Goals and Objectives

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

- Make City Council meeting dockets, supporting materials, docket summary sheets, results, minutes, late-arriving (SB 343) materials, and Closed Session dockets public
- Coordinate the noticing, oath of office, and tracking process for the City's boards and commissions
- Promptly process and respond as appropriate to requests for public records
- Provide reports and information at various Council and Committee meetings on topics related to the Department's core services
- Assist all City departments in keeping their records disposition schedules viable and current

### *Goal 2: Administer the City's election process and serve as the filing officer for a variety of disclosure documents*

- Effectively administer and coordinate municipal elections and citizen petition processes
- Serve as filing officer of the City's campaign finance disclosure reports, statements of economic interests, and municipal lobbyist registrations and reports

### *Goal 3: Embrace continuous improvement in order to maximize customer access to core services and official documents*

- Continue to expand electronic filing options within the City of San Diego where appropriate
- Provide online passport appointment scheduling
- Expand historical material available online through the Clerk's digital archives
- Make the City Council meeting dockets and supporting materials available to the public five days prior to a regularly scheduled Council meeting and provide email updates of all docket revisions and updates prior to the start of the Council meetings
- Ensure all supplemental docket items and supporting materials are available to the public at least 72 hours prior to the Council meeting and that the Summary Sheet of the Docket is available by close of business the Friday prior to regularly scheduled Council meetings
- Upload the results of the Council meetings and all late-arriving (SB 343) documents within 48 hours of the close of the meeting

**Goal 4: Continue to coordinate the City’s records management program**

- Provide records management training to departments, Records Coordinators, Council staff, and Mayoral staff on best practices to expedite legislative and regulatory compliance of City records
- Establish guidelines, training, and resources for departments to maintain vital records to ensure continuity after a disruption or disaster
- Provide greater accessibility to the historical records of San Diego and preserve extremely fragile books, maps, and documents using proven conservation methods and materials

**Goal 5: Explore and develop new public access initiatives to make City government more transparent and accessible**

- Seek out access improvements to Council Chambers in order to maximize participation by all customer groups and minimize any challenges identified by the Office of ADA Compliance and Accessibility or based on language barriers
- Introduce a new and improved electronic docketing management system to streamline the City Council docket and make it easier to locate items of interest and review supporting documents online
- Provide accurate and efficient passport application processing services
- Expand the City’s records management training by incorporating online and self-guided options to maximize participation

## Key Performance Indicators

Performance Indicator	Target FY2015	Actual FY2015	Estimated FY2016	Target FY2017
1. Percentage of public outreach achieved	95%	96%	95%	93%
2. Percentage of current legislative and election-related records made viewable online within a specified time-frame	95%	99%	95%	98%
3. Percentage of historical legislative and election-related records made viewable online within the fiscal year	100%	100%	100%	100%
4. Number of hours of training provided to City staff within the fiscal year	273	274	300	275



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## Department Summary

	FY2015 Actual	FY2016 Budget	FY2017 Proposed	FY2016-2017 Change
FTE Positions (Budgeted)	45.28	45.32	<b>46.32</b>	1.00
Personnel Expenditures	\$ 4,080,469	\$ 4,150,809	\$ <b>4,509,613</b>	\$ 358,804
Non-Personnel Expenditures	1,147,263	1,245,327	<b>1,158,197</b>	(87,130)
<b>Total Department Expenditures</b>	<b>\$ 5,227,732</b>	<b>\$ 5,396,136</b>	<b>\$ 5,667,810</b>	<b>\$ 271,674</b>
<b>Total Department Revenue</b>	<b>\$ 97,832</b>	<b>\$ 69,575</b>	<b>\$ 94,582</b>	<b>\$ 25,007</b>

## General Fund

### Department Expenditures

	FY2015 Actual	FY2016 Budget	FY2017 Proposed	FY2016-2017 Change
City Clerk	\$ 1,719,295	\$ 1,805,544	\$ <b>1,820,487</b>	\$ 14,943
Elections & Information Services	731,701	835,531	<b>914,530</b>	78,999
Legislative Services	1,674,971	1,733,892	<b>1,908,115</b>	174,223
Records Management	1,101,765	1,021,169	<b>1,024,678</b>	3,509
<b>Total</b>	<b>\$ 5,227,732</b>	<b>\$ 5,396,136</b>	<b>\$ 5,667,810</b>	<b>\$ 271,674</b>

### Department Personnel

	FY2015 Budget	FY2016 Budget	FY2017 Proposed	FY2016-2017 Change
City Clerk	5.78	5.82	<b>6.50</b>	0.68
Elections & Information Services	10.50	10.50	<b>10.50</b>	0.00
Legislative Services	19.00	19.00	<b>19.32</b>	0.32
Records Management	10.00	10.00	<b>10.00</b>	0.00
<b>Total</b>	<b>45.28</b>	<b>45.32</b>	<b>46.32</b>	<b>1.00</b>

### Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>Salary and Benefit Adjustments</b> Adjustments to reflect the annualization of the Fiscal Year 2016 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.	0.00	\$ 251,806	\$ -
<b>Addition of Program Coordinator</b> Addition of 1.00 Program Coordinator to coordinate the administrative functions within the Office of the City Clerk.	1.00	107,000	-
<b>Addition of Records Storage Space</b> Addition of non-personnel expenditures to procure shelving for newly acquired storage space to adequately store and preserve legislative documents and inactive records.	0.00	25,000	-
<b>Employee Rewards and Recognition Program</b> Addition of non-personnel expenditures to comply with the Employee Rewards and Recognition Program per Administrative Regulation 95.91.	0.00	2,986	-

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## Significant Budget Adjustments (Cont'd)

	FTE	Expenditures	Revenue
<b>Non-Standard Hour Personnel Funding</b> Adjustment to expenditures according to a zero-based annual review of non-standard hour personnel funding requirements.	0.00	(2)	-
<b>Expenditure Reduction</b> Reduction in non-personnel expenditures due to savings associated with copier paper, graphics and photography, print shop services, and micrographic supplies.	0.00	(20,354)	-
<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	(37,533)	-
<b>Equipment/Support for Information Technology</b> Adjustment to expenditure allocations according to a zero-based annual review of information technology funding requirements and priority analyses.	0.00	(57,229)	-
<b>Revised User Fee Revenue</b> Adjustment to reflect an anticipated revenue increase due to the implementation of revised user fee charges associated with lobbyist registration fees and passport service fees.	0.00	-	30,692
<b>Revised Revenue</b> Adjustment to reflect an anticipated revenue decrease for election filing fees as a result of neither Mayoral nor City Attorney elections scheduled for Fiscal Year 2017.	0.00	-	(5,685)
<b>Total</b>	<b>1.00</b>	<b>\$ 271,674</b>	<b>\$ 25,007</b>

## Expenditures by Category

	FY2015 Actual	FY2016 Budget	FY2017 Proposed	FY2016-2017 Change
<b>PERSONNEL</b>				
Personnel Cost	\$ 2,292,417	\$ 2,379,565	\$ 2,548,644	\$ 169,079
Fringe Benefits	1,788,051	1,771,244	1,960,969	189,725
<b>PERSONNEL SUBTOTAL</b>	<b>4,080,469</b>	<b>4,150,809</b>	<b>4,509,613</b>	<b>358,804</b>
<b>NON-PERSONNEL</b>				
Supplies	\$ 49,631	\$ 109,915	\$ 133,627	\$ 23,712
Contracts	274,436	387,136	340,743	(46,393)
Information Technology	641,856	596,522	539,293	(57,229)
Energy and Utilities	122,671	146,993	139,773	(7,220)
Other	4,573	4,761	4,761	-
Capital Expenditures	54,096	-	-	-
<b>NON-PERSONNEL SUBTOTAL</b>	<b>1,147,263</b>	<b>1,245,327</b>	<b>1,158,197</b>	<b>(87,130)</b>
<b>Total</b>	<b>\$ 5,227,732</b>	<b>\$ 5,396,136</b>	<b>\$ 5,667,810</b>	<b>\$ 271,674</b>

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## Revenues by Category

	FY2015 Actual	FY2016 Budget	FY2017 Proposed	FY2016–2017 Change
Charges for Services	\$ 90,357	\$ 63,467	\$ 82,782	\$ 19,315
Fines Forfeitures and Penalties	100	1,000	1,000	-
Licenses and Permits	7,198	5,108	10,800	5,692
Other Revenue	177	-	-	-
<b>Total</b>	<b>\$ 97,832</b>	<b>\$ 69,575</b>	<b>\$ 94,582</b>	<b>\$ 25,007</b>

## Personnel Expenditures

Job Number	Job Title / Wages	FY2015 Budget	FY2016 Budget	FY2017 Proposed	Salary Range	Total
<b>FTE, Salaries, and Wages</b>						
20000012	Administrative Aide 1	0.00	0.00	1.00	\$36,962 - \$44,533	\$ 44,533
20000024	Administrative Aide 2	4.00	5.00	5.00	42,578 - 51,334	246,584
20000119	Associate Management Analyst	6.00	6.00	6.00	54,059 - 65,333	387,302
20001106	City Clerk	1.00	1.00	1.00	34,694 - 207,210	150,030
90000539	Clerical Assistant 2 - Hourly	0.12	0.15	0.15	29,931 - 36,067	5,410
20000370	Deputy City Clerk 1	18.00	17.00	18.00	32,968 - 39,811	675,824
20000371	Deputy City Clerk 2	2.00	3.00	3.00	37,835 - 45,781	137,325
20001168	Deputy Director	3.00	3.00	3.00	46,966 - 172,744	360,000
20000293	Information Systems Analyst 3	1.00	1.00	1.00	59,363 - 71,760	71,760
90000347	Legislative Recorder 2 - Hourly	0.16	0.17	0.17	43,618 - 52,770	8,971
20000347	Legislative Recorder 2	5.00	4.00	4.00	43,618 - 52,770	205,391
20000172	Payroll Specialist 1	1.00	1.00	1.00	33,093 - 39,832	39,832
20001234	Program Coordinator	0.00	0.00	1.00	23,005 - 137,904	80,454
20000927	Senior Clerk/Typist	1.00	1.00	0.00	36,067 - 43,514	-
20000950	Stock Clerk	1.00	1.00	1.00	30,056 - 36,275	36,145
20000955	Storekeeper 1	1.00	1.00	1.00	34,611 - 41,517	34,611
20000756	Word Processing Operator	1.00	1.00	0.00	31,491 - 37,918	-
	Bilingual - Regular					13,104
	Budgeted Vacancy Savings					(32,968)
	Overtime Budgeted					10,116
	Sick Leave - Hourly					447
	Termination Pay Annual Leave					41,277
	Vacation Pay In Lieu					32,496
<b>FTE, Salaries, and Wages Subtotal</b>		<b>45.28</b>	<b>45.32</b>	<b>46.32</b>		<b>\$ 2,548,644</b>

	FY2015 Actual	FY2016 Budget	FY2017 Proposed	FY2016–2017 Change
<b>Fringe Benefits</b>				
Employee Offset Savings	\$ 25,520	\$ 25,713	\$ 26,033	\$ 320
Flexible Benefits	336,763	396,226	464,754	68,528
Insurance	102	-	-	-
Long-Term Disability	20,865	7,583	7,819	236
Medicare	32,773	33,111	34,920	1,809
Other Post-Employment Benefits	276,502	258,984	266,355	7,371
Retiree Medical Trust	926	1,073	1,309	236
Retirement 401 Plan	516	407	806	399

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	FY2015 Actual	FY2016 Budget	FY2017 Proposed	FY2016-2017 Change
Retirement ADC	867,207	810,469	908,982	98,513
Retirement DROP	8,480	8,521	8,521	-
Risk Management Administration	39,704	46,200	46,035	(165)
Supplemental Pension Savings Plan	127,190	136,687	144,160	7,473
Unemployment Insurance	4,813	4,346	4,487	141
Workers' Compensation	46,689	41,924	46,788	4,864
<b>Fringe Benefits Subtotal</b>	<b>\$ 1,788,051</b>	<b>\$ 1,771,244</b>	<b>\$ 1,960,969</b>	<b>\$ 189,725</b>
<b>Total Personnel Expenditures</b>			<b>\$ 4,509,613</b>	