

# Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters FY 2009-10 Performance Plan

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## I. MISSION STATEMENT

The mission of the Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters is to provide a responsive, efficient and professional approach in service to our community, to inspire trust and confidence in our work and to promote participation for all citizens in the election process.

## II. DEPARTMENT OVERVIEW

The office of the Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters is an elected position overseeing the following divisions and programs:

- Treasurer
- Tax Collector
- Central Collections
- County Clerk
- Public Administrator
- Registrar of Voters

### Treasurer

The Treasurer is responsible for the receipt, investments, safekeeping, banking, and accounting of over \$800 million on behalf of the County, school districts, colleges and certain special districts.

### Tax Collector

The Tax Collector is responsible for the billing, collection and payment enforcement of taxes levied for the County and other taxing agencies including schools, cities and special districts located within the County.

### Central Collections

The Central Collections Unit provides billing and collection services for County departments' accounts receivables and handles difficult accounts requiring collection expertise.

### Public Administrator

The Public Administrator is responsible for investigating, safeguarding and inventorying all assets of the Public Administrator estates, as well as the administration of court-ordered estates and trusts.

### County Clerk

The County Clerk processes, files and indexes documents including fictitious business name statements, marriage licenses, domestic partnerships, notary certificates, oaths of office, Environmental Impact Reports, registration of professional photocopiers and process servers, business licenses, and various permits. As Commissioner of Civil Marriages, the County Clerk and deputy clerks also perform marriage ceremonies. State law and local ordinances mandate the duties of the County Clerk, which are offset by fees. The County Clerk's office is also designated as a passport agency by the U.S. Department of State by processing passport applications. These services provide the County with added revenue to offset the County Clerk's overall operating costs.

### Registrar of Voters (Elections Office)

## **Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters FY 2009-10 Performance Plan**

---

The Registrar of Voters' responsibilities include registering voters, maintaining voter registration files, conducting Federal, State, County, and school elections, conducting municipal and special district elections at the request of the governing bodies, and verifying initiative, referendum, and recall petitions. The Registrar also maintains information on office holders and candidates as required by the Fair Political Practices Commission.

### **III. FY 2008-09 ACCOMPLISHMENTS**

- Completed the modernization/upgrade to the County's property tax assessment, billing and collection system (PISMO) in conjunction with the offices of the Auditor-Controller, Assessor, and Information Services
- Implemented full reconciliation with positive pay processes with our banking service provider to reduce the risk of fraud and further safeguard County of Marin assets
- Implementation of a web based Fictitious Business Name (FBN) system enabling greater access to FBN information and the completion of forms via the internet
- Successfully conducted the Presidential General Election on November 4, 2008 with a record 90.8% turnout of voters, a 12% increase in voter turnout
- Translated our County Clerk forms into Spanish to improve customer service and access to our services
- Increased outreach activities and voter interest in the Presidential election resulted in a 12% increase in voter registration to a record 155,650 registered voters and highest percentage of registered voters of any county in California (85%)
- Issued vote by mail ballots to 97,168 voters, 62.43% of registered voters, for the November general election, a 17% increase over the November 2006 general election.
- Recruited 772 poll workers for 175 voting precincts for the General Election
- Reviewed and updated County Clerk forms to comply with changes in State and Federal laws and regulations
- Upgraded the Marriage License System to comply with the passing of Proposition 8 including newly enacted State mandates and code provisions

### **IV. GOALS AND KEY INITIATIVES FOR FY 2009-10**

#### **Goal 1: Perform the various functions of the department in a cost effective and responsive manner in service to our community**

Please indicate how goal reflects one of the department's highest priorities and aligns with Countywide Goals and Priorities

Our top priority is providing excellent public service both internally and externally. We provide a necessary service to County departments to support operations of the County while collecting County debts in a professional, respectful and helpful manner. In addition, provide an outreach of information and knowledge to the community concerning the importance of estate planning to insure the wishes of decedents are met to offset case workload and to avoid from determining the disposition of the estate.

#### **FY 2009-10 Key Initiatives**

**Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters  
FY 2009-10 Performance Plan**

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**FY 2009-10 Key Initiatives**

1. Implement formal agreements referred to as Memorandums of Understandings with Departments to provide Accounts Receivable/Billing Services and relief from accountability for uncollectible accounts
2. Focus and emphasize on community outreach within the County of Marin through our Public Administrator's office concerning the need for estate planning

**Goal 2: Ensure high quality internal and external customer service through improved communications and business processes**

Please indicate how goal reflects one of the department's highest priorities and aligns with Countywide Goals and Priorities

This goal promotes excellent public service but also provides service excellence. Once the common counter is completed and signage is complete, we will begin to provide a "one-stop" shop in providing information concerning property tax related issues.

**FY 2009-10 Key Initiatives**

1. Implement the combination of the Assessor's counter with that of the Tax Collector to provide increased customer service
2. Improve signage within our offices to improve public access to services

**Goal 3: Ensure community trust by providing fair, accessible and effective elections**

Please indicate how goal reflects one of the department's highest priorities and aligns with Countywide Goals and Priorities

This goal provides community collaboration and partnering as the initiatives below are a direct result of our recently formed Election Advisory Committee. The Registrar of Voter's Election Advisory Committee serves an important voter outreach function for the County. The purpose of the Advisory Committee is to provide advice to the Registrar of Voters on increasing voter participation in the electoral process and on other timely election issues that affect voting and elections held in Marin County. It provides for a two-way communications link between the voting public and the Registrar of Voters and advises the Registrar of Voters on ways to ensure that every voter has the opportunity to vote knowledgeably, safely and effectively.

**Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters  
FY 2009-10 Performance Plan**

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**FY 2009-10 Key Initiatives**

1. Conduct the November 3, 2009 District Election and the June 8, 2010 Direct Primary Election within the 2009-2010 budget
2. Increase the successful delivery rate for ballot and sample ballot mailings to 100% by implementing methods that maintain the voter file current and accurate
3. Increase the consolidation of precincts within the limits allowed by law to achieve greater efficiency and cost savings

**V. KEY CHALLENGES AND ISSUES**

- Upgrade CUBS, the collection system for the Central Collection department in order to meet reporting and compliance mandates within the current budget constraints
- Being able to meet the State's requirements to provide special elections within budget limitations in accordance with State Mandates and timelines
- Large number of upcoming retirements in all areas of the department resulting in the need for training and develop of new hires in an environment of declining County resources

**VI. PERFORMANCE MEASURES**

**PUBLIC ADMINISTRATOR**

**Objective: Increase the community's awareness of the services provided by the Public Administrator's office, and the benefits of estate planning**

<b>Measures</b>	<b>FY 06-07 Actual</b>	<b>FY 07-08 Actual</b>	<b>FY 08-09 Estimate</b>	<b>FY 09-10 Estimate</b>
<b>Workload Measures</b>				
Number of staff hours to create and update the website	30	19	30	30
Number of hits received on the Public Administrator's website	n/a	6,163	6,500	6,500
Number of informational workshops conducted	n/a	10	2	10
<b>Effectiveness Measures</b>				
Percent of cases without estate plans	85%	90%	84%	87%

**Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters  
FY 2009-10 Performance Plan**

---

**Department Comments:** The informational outreach workshops were greatly reduced in FY 2008-09 due to the increase in estate cases that required the limited staff of three deputies to spend more time in the field and handling administration of the estates. We hope to re-establish the outreach program in FY 2009-10. Since July 2008, the Public Administrator (PA) has received 81 estate inquiries of which 26 have become estate cases. Of these, five estates required extensive sorting and clean-up. In addition, the PA has sold \$4,505,628 in estate real property since July 2008 compared with \$1,799,399 in FY 2007-08, and presently has approximately \$1.4 million on the market. The PA currently manages 192 estates with a total value of \$9,245,670.

**CENTRAL COLLECTIONS**

**Objective: Increase the accuracy of information on County departmental collection assignments submitted in order to more efficiently pursue collection accounts**

Measures	FY 06-07 Actual	FY 07-08 Actual	FY 08-09 Estimate	FY 09-10 Estimate
<b>Workload Measures</b>				
Number of staff hours to create and modify electronic billing and collection agreement templates	240	160	140	80
Percentage of requests submitted electronically by departments	45%	60%	60%	65%

**Department Comments:** Central Collections bills and collects on approximately 50 different types of accounts for the County and other Special Districts. To streamline the billing and collections process, staff developed standardized billing and collection agreement templates for customers use that can be loaded into the supporting system. This improvement allows staff to focus more on billing and collections and less time on data entry.

**Objective: Increase the number of paid in full collection accounts to the County each fiscal year**

Measures	FY 06-07 Actual	FY 07-08 Actual	FY 08-09 Estimate	FY 09-10 Estimate
<b>Workload Measures</b>				
Number of accounts worked annually	7,543	8,048	7,500	7,500
Number of hours to upgrade computer system and train staff on functions of system	n/a	80	120	160
<b>Effectiveness Measures</b>				
Percentage of accounts resolved annually	80%	82%	82%	80%

**Treasurer-Tax Collector-Public Administrator-County Clerk-Registrar of Voters  
FY 2009-10 Performance Plan**

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**Department Comments:** Based on positive collection results from client departments, we do not anticipate an increase of collection accounts which will allow Central Collections staff time to upgrade the central collection system in 2009-10. It will take approximately 160 hours of staff training and implementation but will allow for much more efficient collections efforts long term.