



# Improving performance to better serve our county residents

Countywide Operational  
Performance Review – Santa  
Barbara Clerk-Recorder, Assessor,  
and Elections Department

January 2024

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# Executive Summary

The County of Santa Barbara (the County) contracted with KPMG LLP (KPMG) in May 2019 to conduct an operational and performance review of all County departments. KPMG conducted a review of the Clerk-Recorder, Assessor, and Elections Department (the Department) commencing in May 2023. The purpose of this review was to provide a high-level assessment of the Department to identify strengths and opportunities across key focus areas with the goal of enhancing overall operational efficiency, effectiveness, and service delivery provided by the Department.

The following focus areas per division were developed in conjunction with the CEO’s Office and the Department to guide the focus of this review. These focus areas are outlined in the graphic below.

	<b>Clerk-Recorder</b>	– High-level review of data management, workload management, budget balance, and rate benchmarking
	<b>Assessor</b>	– Deep-dive review of operational processes and efficiency, including major drivers for improving forecasting, cycles times, workload management and communication loops, and staffing/vacancies.
	<b>Elections</b>	– Deep-dive review of operational processes and efficiency, use of technology, staffing practices, and alignment of leading practices

Figure 1: Source: KPMG

## Scope and Methodology

Over a 12-week period, the KPMG Team conducted the following activities:

- Approximately 41 interviews with Department leadership and staff to understand the organizational structure, roles and responsibilities, operations, and processes of the Department
- Analysis of available data and policy documents to understand the demands upon and the operations of the Department
- A benchmarking review was also conducted across the eight benchmark counties specified in our contract at the request of the CEO’s Office. Please refer to the Appendix for detailed full-time equivalents (FTE) and budget benchmarking across the Department.



Figure 2: Source: KPMG

## Description

The Department is responsible for administering critical services for County residents:

- The Clerk-Recorder Office provides record-keeping services for the County, including the issuance of marriage licenses and the maintenance of birth, death, and marriage records.
- The Assessor Office is responsible for determining property values within the County, which are used to set property tax rates for County residents.
- The Elections Office outlines, administers, and delivers all County elections with strict adherence to State of California (the State) laws and regulations. They enable voters to have easy access to the voting process, from distributing mail-in ballots, managing polling stations, conducting voting, and counting election ballots as required by the law.

As a result, these offices are critical to enabling administrative and legal compliance in the County and providing the necessary services to support residents in their daily lives.

## Mission

The Department's mission is to honor the public's trust by assuring honest and open elections; recording, maintaining, and preserving property and vital records; setting fair and impartial values for tax purposes; and providing courteous and professional service at a reasonable cost.

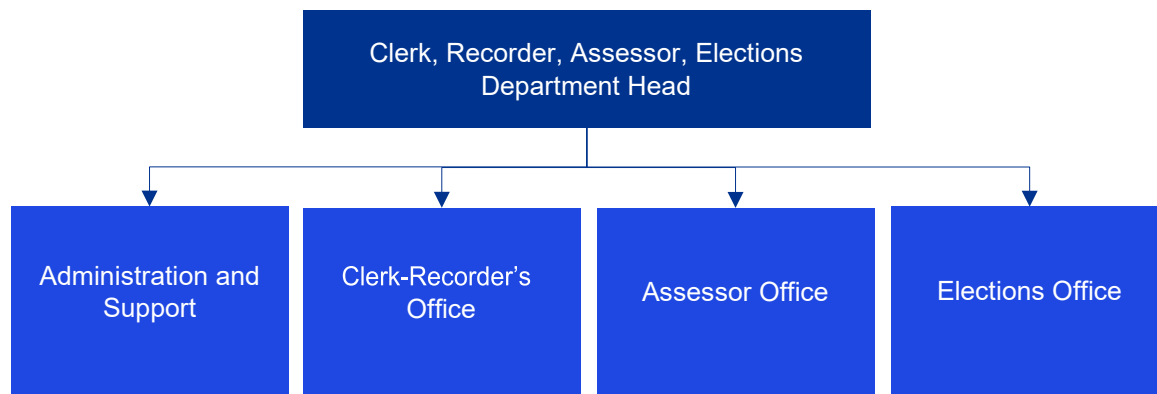


Figure 2: Source: KPMG

## Budget Information for Fiscal Year 2022–2023

\$21.7 million	\$240,000	\$12 million	109
Operating Expenses	Capital Assets	General Fund Contribution	FTEs

Figure 3: Source: KPMG

## County Benchmarks

The benchmarks utilized to develop the average FTEs and budget below relate to the eight benchmark counties of Monterey, Solano, Sonoma, Tulare, Placer, San Luis Obispo, Marin, and Santa Cruz. Please see County Budget and FTE Benchmarks Appendix for further detail.

		Santa Barbara	Average
Clerk-Recorder	Division FTE	24.50	16.16
	Percent of Enterprise	0.55%	0.43%
	FY 2022–2023 Division Budget (\$'000)	3,921	3,241
	Percent of Enterprise	0.28%	0.22%
Assessor	Division FTE	57.00	59.72
	Percent of Enterprise	1.28%	1.79%
	FY 2022–2023 Division Budget (\$'000)	9,611	10,220
	Percent of Enterprise	0.68%	0.84%
Elections	Division FTE	21.50	10.76
	Percent of Enterprise	0.48%	0.29%
	FY 2022–2023 Division Budget (\$'000)	6,311	4,597
	Percent of Enterprise	0.45%	0.34%

Figure 4: Source: KPMG

## Commendations

The below commendations, broken down by office, were identified during the course of the review and recognize the dedication of the Department to its mission.

### **Clerk-Recorder Office – Strong workload management capabilities**

The Clerk-Recorder Office has developed strong workload management capabilities, further enhanced by the transition to a records management system that has strengthened the Department's staff performance monitoring and analysis capabilities with a suite of specialized tools. This includes the use of a dashboard, which provides daily insights into activity and productivity.

### **Clerk-Recorder Office – Leader in technology innovation**

The Clerk-Recorder's Office has and continues to play a leading role in researching opportunities to pursue blockchain and other forms of digital authentication. Commendably, the Clerk-Recorder Office has demonstrated a commitment to solutions balancing innovation with security and eliminating the need to use a notary for customers who cannot be authenticated by clerks in person. This report includes a number of recommendations for consideration to further advance this pursuit of digitization.

### **Assessor Office – Commitment to modernization efforts**

The Assessor Office has shown a significant commitment to modernization efforts. This includes the digitization of commercial real estate and mobile home records, which help enable the Assessor Office to manage and track these records more efficiently. Additionally, the Assessor Office has developed a plan to support the future digitization of 132,000 real estate parcels. These efforts support the modernization of record-keeping systems and the streamlining of operations, resulting in improved process efficiency and faster access to accurate information.

### **Assessor Office – Innovative dashboard to boost productivity**

The Assessor Office has implemented an innovative dashboard that tracks property sales and values over time and provides significant insight into historical market trends. These insights support the Assessor Office in rapidly making informed decisions surrounding future market conditions, workload, and resource allocation. This report outlines a number of opportunities to expand this dashboard to include additional performance measures and support predictive analytic capabilities in the future.

### **Elections Office – Efficient ballot processing due to transition to E-Poll books**

The Elections Office has successfully transitioned to E-Poll books, a modern digital version of traditional paper poll books. This transition has significantly enhanced elections administration efficiency. It has decreased workload for poll workers and expedited election result reporting. Furthermore, the transition makes voters' precinct information available electronically, significantly reducing printing costs, as well as the time required to manually manage and distribute paper poll books.

### **Elections Office – Strong election planning and management capabilities**

The Elections Office achieved great success in its management of the November elections. The Office's meticulous planning and skilled execution led to a smooth electoral process, with no significant challenges experienced.

### **Department-wide – Deep commitment to mission**

Across staff interviews, it became clear that there is a strong commitment to public service and fulfilling the Department's mission. The staff's dedication to their work is evident in their day-to-day responsibilities and the quality of services they provide. This commitment to public service is a critical component of the Department's success and reinforces its reputation as a reliable and impactful entity.

## Renew '22 Mapping

The recommendations made within the operational review have been aligned to the Renew '22 transformation behaviors to enable the recommendations to continually drive toward the Renew '22 strategic vision, as seen in the figure below. The colored tiles identify the Renew '22 transformation behaviors that align to each recommendation.

			Transformation Behaviors				
			Alignment with vision	Data-driven decision-making	Strategic thinking	Risk taking	Collaborative problem-solving
Clerk-Recorder	1.1	Continue to pursue opportunities for transition toward digital vital record copies to reduce reliance on paper confirmation, reduce risk, and reduce time needed to confirm records.					
Assessor	2.1	Enhance staff productivity tracking processes to improve consistency in evaluating staff performance and support proactive identification of process inefficiencies.					
	2.2	Expand the utilization of dashboarding to enhance data-sharing mechanisms and reduce data fragmentation both internally and cross-departmentally.					
	2.3	Enhance processes to communicate promotion requirements to staff to increase awareness and application.					
Elections	3.1	Consider implementing a new logistics management system to improve processes and ease workload across the Elections Office.					
	3.2	Consider alternate approaches for elections equipment transportation to support the timely distribution of elections equipment.					
	3.3	Collaborate with the CEO Office and other complementary County departments to consider alternate storage options for elections equipment.					
	3.4	Explore additional channels for recruiting temporary staff to increase labor pools and continue to attract candidates with highly transferable skill sets.					
	3.5	Perform a fee study to identify an optimal billing methodology, reimbursement rate(s), and supporting weight factors that align to election cycle cost.					

Figure 5: Source: KPMG

## Prioritized Timeline

The following report consists of eight recommendations that were developed as part of this review. Proposed high-level timing and prioritization for each recommendation is depicted below. Please refer to the Appendix for a more detailed timeline by month.

			High-level Timeline			
			Months 1–3	Months 4–6	Months 7–9	Months 10–12
Clerk-Recorder	1.1	Continue to pursue opportunities for transition toward digital vital record copies to reduce reliance on paper confirmation, reduce risk, and reduce time needed to confirm records.				
Assessor	2.1	Enhance staff productivity tracking processes to improve consistency in evaluating staff performance and support proactive identification of process inefficiencies.				
	2.2	Expand the utilization of dashboarding to enhance data-sharing mechanisms and reduce data fragmentation both internally and cross-departmentally.				
	2.3	Enhance processes to communicate promotion requirements to staff to increase awareness and application.				
Elections	3.1	Consider implementing a new logistics management system to improve processes and ease workload across the Elections Office.				
	3.2	Consider alternate approaches for elections equipment transportation to support the timely distribution of elections equipment.				
	3.3	Collaborate with the CEO Office and other complementary County departments to consider alternate storage options for elections equipment.				
	3.4	Explore additional channels for recruiting temporary staff to increase labor pools and continue to attract candidates with highly transferable skill sets.				
	3.5	Perform a fee study to identify an optimal billing methodology, reimbursement rate(s), and supporting weight factors that align to election cycle cost.				

Figure 6: Source: KPMG



## Operating Model Maturity Scale

The figure below summarizes the Department’s current-state operating model across the Department’s three offices, as well as the target state that can be achieved by implementing the recommendations in the following sections. The purple boxes indicate each office’s capabilities at the time of the review, and the gold boxes illustrate the level of maturity that KPMG believes is attainable through the recommendations in this report. Each operating model layer describes a continuum of maturity related to optimal service delivery.

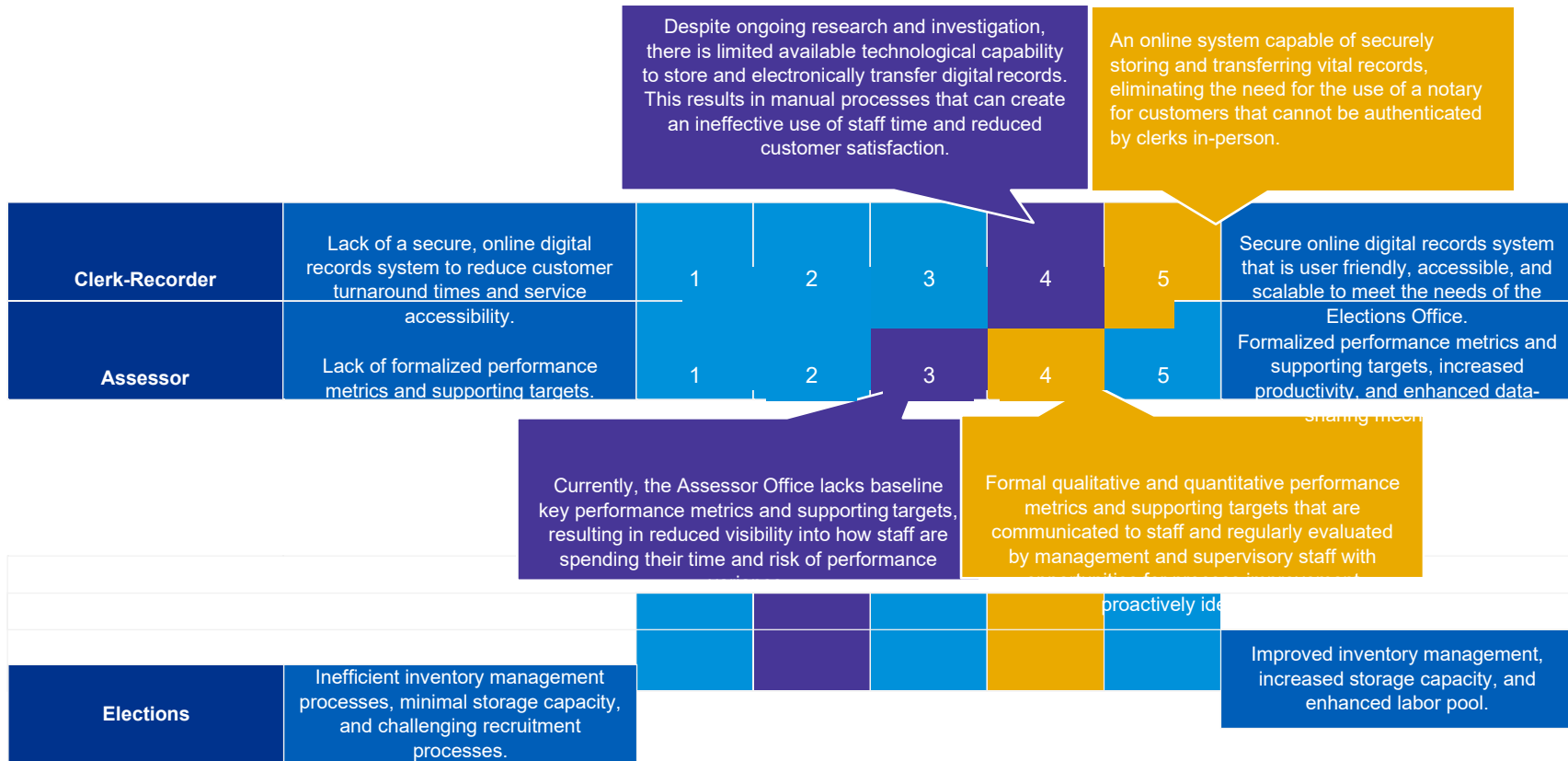


Figure 7: Source: KPMG



# Clerk-Recorder

The below recommendation is associated with the Clerk-Recorder Office.

<b>1.1</b>	<b>Continue to pursue opportunities for transition toward digital vital record copies to reduce reliance on paper confirmation, reduce risk, and reduce time needed to confirm records.</b>
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### Benefit

Transitioning towards a digital vital records within the Clerk-Recorder Office will have a number of key benefits:

- It will reduce turnaround time for customer requests and transactions, improving transaction costs, service accessibility, and customer satisfaction.
- The right solution may also offer opportunities to further enhance security compared to traditional paper-based methods via blockchain, detection, and multifactor authentication (and validation) technologies.
- Finally, it may provide future cost efficiencies through a reduction in the need for manual processes, such as printing, mailing, and/or faxing records.

### Current State

In the current state, the Clerk-Recorder Office is responsible for maintaining vital records such as birth, death, and marriage certificates. Their internal processes are designed to minimize the potential for unauthorized fraud and data loss, ultimately supporting records that are accurate, secure, and available for eligible individuals or organizations.

The process for requesting vital records such as birth, death, and marriage certificates from the Clerk-Recorder involves the submission of an application via mail, fax, or in-person at the one of the Clerk-Recorder Offices. This includes the requirement to have physical or notarized copies of documents to complete a transaction. This traditional approach lacks automation, and can be time-consuming for customers, as they must wait for delivery by mail or fax, or schedule time to travel to one of the Clerk-Recorder offices to submit their request in person. Average application processing times per submission method are outlined in the table below:

7 to 10 business days	1 to 3 business days	Immediate; however, may take up to 3 days if requested documents are unavailable

*Figure 9: Source: Staff Interviews*

Currently, the lack of digital records in the current system, along with dependence on manual data entry and printing of records, presents several implications, such as:

- **Ineffective use of staff time:** The existing system results in increased workload for Clerk-Recorder staff, requiring them to manually print, mail, fax, or directly deliver requested records to customers.

- **Reduced customer satisfaction:** The current process does not provide immediate access to vital records without requiring a customer to travel directly to one of the Clerk-Recorder offices. This may result in high customer transaction costs and inconvenience, particularly in instances where customers must travel a long distance to reach one of the offices. This may potentially result in reduced customer satisfaction and or avoidance of application submission.

It is important to note that the transition toward digital records is supported by the passage of a new bill by the State in September 2022 regarding the utilization of blockchain technology and verifiable credentials.

The Clerk-Recorder, in collaboration with a number of other California counties, has already been engaged in evaluating various methods and technologies for the digitization of vital records to eliminate the use of a notary for customers who cannot be authenticated by clerks in person. However, numerous external stakeholders—including the need for coordinated government agency adoption of digital vital records—must first be aligned in order for the County to progress this work locally.

### Recommendation

In the future state, the Clerk-Recorder Office may continue to consider opportunities for transition toward digitalization of vital records. This may be undertaken by continuing to collaborate with other government agencies to formalize, update, and enrich a detailed needs assessment to outline future system requirements and a strategic cost-benefit analysis and supporting business case for system adoption. Dedicated funding may also be required, along with engagement of key community stakeholders and—eventually—the selection of a suitable system solution.

### Suggested Action Steps to Implement Recommendation

It is important to note that the actions outlined below cannot be undertaken independently and will require significant collaboration with key government agencies, such as the State and Department of Motor Vehicles (DMV), to help ensure that the system is utilized most efficiently and effectively. Given the level of collaboration required, the implementation of a solution may take some time.

Action one: Conduct a needs assessment for the digitization of vital records. As a first step, the Clerk-Recorder Office should continue to formalize, update, and enrich a needs assessment to identify the key requirements of any future system that would allow for the transition toward digital records.

This may be completed by undertaking the following steps:

- **Step one:** Conduct an in-depth review of current infrastructure, processes, and current process workflows to develop detailed insights into current opportunities for digitization.
- **Step two:** Develop surveys and facilitate focus groups with staff to collect further information, insights, and ideas from key staff as it relates to the potential transition toward digital records.
- **Step three:** Identify the key drivers for change by reviewing strengths and weaknesses of current processes and workflows. Key drivers for change may relate to streamlining processes for efficiency, reducing staff workload, and increasing customer satisfaction.
- **Step four:** Determine the key requirements of any system that will support the transition toward digital records. Key requirements should be aligned to Clerk-Recorder and wider Department strategy and may focus on security of records, data capture, automated extraction, searchable database, etc. In considering key requirements, the Clerk-Recorder Office may also consider engaging key stakeholders, such as customers; authorities, such as DMV; and law enforcement.

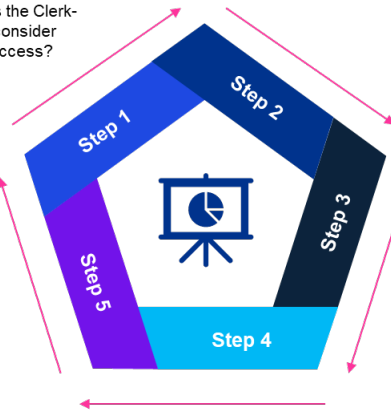
**Action two: Conduct a strategic cost-benefit analysis to determine the feasibility of the initiative and report results to Department and County leadership.** Following the completion of a needs

assessment, the Clerk-Recorder Office should consider conducting a strategic cost-benefit analysis to determine the feasibility of the initiative. This may involve undertaking the following key steps:

**Step one: Establish a framework for analysis:**

As a first step, the Clerk-Recorder Office should consider establishing a framework for the cost-benefit analysis by identifying the key goals and objectives of the analysis. i.e. what does the Clerk-Recorder Office need to accomplish to consider the transition toward digital records a success?

**Step five: Develop a high-level strategic plan:** As a final step in this process, the Office should develop a high level strategic plan which outlines the goal and objectives of the transition, the cost/benefit analysis, key solution requirements, key stakeholders, a stakeholder engagement plan, as well as a roadmap to deliver the transition. This high-level strategic plan should be presented to the Board of Supervisors and County leadership as a mechanism to deliver a business case and request support and approval in funding these efforts.



**Step four: Consider sources of funding:** The Clerk-Recorder Office should subsequently consider the potential sources of funding to support the transition toward digital records. As part of this process, The Clerk-Recorder Office may consider grant funding or public-private partnerships to support these efforts or alternatively whether existing revenue can support the transition. The Office may also consider engaging with the Board of Supervisors and County Leadership to consider the feasibility of adopting general fund dollars for this purpose.

**Step two: Identify costs and benefits:** As a next step, the Clerk-Recorder Office should identify both the costs and benefits associated with the transition toward digital records. This will involve considering the potential cost of system implementation and as such, may require the Clerk-Recorder Office to solicit an Request for Information (RFI) to identify existing vendors, system capabilities, system security, as well as cost. In addition to the direct costs associated with system implementation, the Clerk-Recorder Office should consider the indirect costs associated with system implementation, this may include staff costs and overtime, given an internal team will likely need to be established to manage day-to-day implementation, as well as potential consulting services etc. Benefits should be considered in the short, medium, and long-term and may relate to increased customer satisfaction, improved employee morale, and reduced workload cost in the long-term.

**Step three: Assign a value to costs and benefits:** Following the identification of costs and benefits, the Clerk-Recorder Office should assign a value to each cost and benefit. This will support comparison of cost versus benefit. Utilizing this information, the Clerk-Recorder Office should consider the merit of the transition toward digital records. Where the Clerk-Recorder Office decide that the long-term benefits of this transition outweigh the upfront cost, they should move forward with steps four through six below.

**Action three: Establish a program with seed funding to manage the transition toward digital records.** Once the Clerk-Recorder Office has obtained the relevant approval, they may consider establishing a program or team with seed funding to commence the process of identifying a system capable of the supporting the transition toward digital records.

**Action four:** Engage key stakeholders and establish a dedicated collaborative. As a next step, the Team established under Action three should commence engagement with key stakeholders. Initially, the Team should engage staff across the Clerk-Recorder Offices, to identify key staff who may have subject matter expertise and may support the process of finalizing and prioritizing the key system requirements identified as part of the needs assessment undertaken within Action one. As a next step, the team should continue to collaborate with key state agencies and other interested California counties to establish a dedicated collaborative focused on pursuing the digitization of vital records. In addition, the collaborative may consider whether an outside consultant with critical subject matter expertise will be required to support the prioritization of key system requirements and the development of the RFP outlined in Action six.

**Action five: Seek funding.** Subsequently, the collaborative should seek and secure funding for system adoption. This may be undertaken by identifying opportunities for public-private partnerships, applying for grant funding, and/or requesting funding from County leadership in the form of tax revenue allocations or general fund dollars.

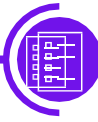
**Action six: Consider mechanisms to design and develop a blockchain platform or solution for the digitization of vital records.** Once funding has been secured to follow through with the transformation, the collaborative may consider one of two options:

- **Option one:** Consider whether the collaborative has the technical expertise to design, develop, and implement a solution internally.

- **Option two:** If required, engage an external vendor to support the design and development of the solution through a request for proposal (RFP) process. The RFP process will support the Clerk-Recorder Office in identifying a technical solution provider that meets the specific identified needs and requirements. The selected provider should have a reliable and secure platform that promotes the privacy and integrity of customer data while providing an efficient and effective digital service that is accepted by government agencies.

**Action seven: Develop an implementation plan:** Once a successful vendor/solution has been identified dependent on the options selected in action six, an implementation plan should be developed to guide system adoption. The implementation may consider the following key areas at a minimum:

- **Security:** Federal, State, and Clerk-Recorder Office security requirements.
- **Change Management:** Activities to support change management and stakeholder buy-in.
- **Technology infrastructure:** This will vary based on the solution adopted, but should consider storage devices, networking tools, and databases.
- **System Design:** Key design components and timeline for completion should be considered in developing the implementation plan.
- **Migration and sustainment:** Consider key data for migration to the new system and mechanisms to migrate.
- **System testing:** Identify type of testing as well as timeline for testing.
- **System management:** Consider whether system management and maintenance will be undertaken internally or externally on a go-forward basis.
- **Training:** Identify key training areas.
- **Policy and process:** Consider key policy and process changes.



# Assessor

The below recommendations are associated with the Assessor Office.

<b>2.1</b>	<b>Enhance staff productivity tracking processes to improve consistency in evaluating staff performance and support proactive identification of process inefficiencies.</b>
<b>Benefit</b>	
<p>Enhancing staff productivity tracking across the Assessor Office will have a number of key benefits:</p> <ul style="list-style-type: none"> <li>• It will lead to more effective staff performance management by enabling supervisors to visualize both pending and projected workloads more clearly, thus allowing them to more precisely plan and refine the distribution of work across their staff.</li> <li>• It will increase transparency into how appraisers are spending their time, allowing Assessor Office and Department leadership to uncover potential areas for process improvements and performance enhancement which may increase process efficiencies.</li> </ul>	
<b>Current State</b>	
<p>The Assessor Office currently assesses staff productivity and performance utilizing both quantitative and qualitative measures. Quantitative evaluations of staff output are conducted by reviewing the number of appraisals completed per staff member on a weekly/monthly basis. Qualitative factors, such as job knowledge, report preparation, and analytical ability are also evaluated periodically when considering staff performance.</p> <p><b>Quantitative Performance Factors</b></p> <p>Appraisals across property types can vary significantly in terms of complexity and time intensity. For example, a commercial property appraisal is likely to be more complex and more time intensive than a residential property appraisal. However, currently, the Assessor Office does not track the average or median time taken to conduct an appraisal by property type nor the associated travel time. This reduces leadership's ability to effectively compare performance across staff members, identify opportunities for process efficiencies, and establish baseline targets for staff to enhance accountability and promote efficiency.</p> <p><b>Qualitative Performance Factors</b></p> <p>Finally, while supervisors note that qualitative factors such as job knowledge, report preparation, and analytical ability are assessed, there are limited performance metrics to monitor these factors. Rather, they are largely based on supervisor observation, which in the absence of data can be largely subjective. The lack of formal performance measures to assess these qualitative factors may also result in inconsistent adoption and inability to effectively compare performance across key staff members with the aim of enhancing performance.</p> <p>The limited baseline key performance metrics adopted across the Assessor Office has reduced visibility into how staff are spending their time, resulting in an inability to identify and management performance across staff, as identified based on the data analysis presented above. It also results in increased potential for process inefficiencies to go unnoticed and unresolved. These combined factors may result in reduced efficiency and effectiveness in service delivery.</p>	

## Recommendation

In the future state, the Assessor Office may consider conducting a time study to enhance understanding of how staff members are spending their time and utilizing the resulting time study data to develop baseline appraisal completion times and performance metrics. The implementation of these performance metrics should be supported by regular reporting and performance monitoring with targets embedded within task management processes, and a process for supervisors to recognize reasonable departures from targets on the basis of task complexity.

## Leading Practice

Los Angeles County assesses the following key metrics as part of its collective and individual performance management system for Appraisers<sup>1</sup>:

- Percent of transfers valued by appraisers in less than 60 days of receipt from the Ownership Division
- Number of timely filed business property statements received
- Percent of appeals cases carried over to next fiscal year
- Percent of re-appraisable transfers valued and enrolled.

## Suggested Action Steps to Implement Recommendation

**Action one: Conduct a detailed time study to provide a data-driven understanding of how staff are spending their time.** As a first step, the Assessor Office should conduct a low-barrier pilot program for staff working across property type appraisals to enter time spent on specific tasks undertaken. This will allow the Assessor Office to better track the time spent on specific tasks, including travel time. This pilot can be facilitated via a simple spreadsheet with prepopulated drop-down fields to reduce the time it takes to enter information. Staff should be encouraged to populate the spreadsheet daily to obtain the most accurate view of how staff members are spending their time. This time tracking exercise should be conducted for a three- to six-month period and analyzed monthly by supervisors to enhance the understanding of how staff members are spending their time.

**Action two: Undertake a process assessment for appraiser activities to evaluate current process efficiency.** Having conducted the time study as recommended above, the Assessor Office should analyze the results of the study to consider current workload and identify any opportunities to enhance efficiencies across staff or redirect staff time where possible. The assessment should include the following analysis:

- **Step one:** Evaluate the results of the time study to identify the range and median appraisal completion times by property type.
- **Step two:** Based on the time study, identify those staff members who consistently perform well above the median completion time and staff members who consistently perform well below the median completion time across the appraisal of similar properties.
- **Step three:** Conduct focus groups with those staff members who consistently perform above median to understand individual appraisal methods and identify efficiencies. Train remaining staff on identified efficiencies and leading practices.

<sup>1</sup> <https://ceo.lacounty.gov/wp-content/uploads/2021/12/2021-22-Performance-Measures.pdf>

- **Step four:** Engage separately with those staff members who consistently perform below median to understand potential bottlenecks in processes undertaken and put procedures in place to alleviate any bottlenecks.

**Action three: Develop baseline performance metrics and targets.** Based on the time and workload analysis detailed in Action one and Action two above, the Assessor Office should develop baseline performance targets and appraisal completion times based on property type or appraisal type. These baseline performance targets will enable staff members to be given goals based on their roles and responsibilities and allow for a more formalized and consistent approach to performance management. Performance metrics should also be used in conjunction with a more holistic appraisal of quality. These performance metrics and targets should be built into task management processes.

**Action four: Task supervisors to engage collaboratively with staff on a biweekly basis to evaluate performance.** Once the Assessor Office has established baseline performance metrics and targets and appraisal completion times, leadership should provide guidance to supervisors on working collaboratively with staff members to support them in achieving these targets. This guidance should require supervisors to connect with staff on a biweekly basis to discuss workload, performance, and collaboratively develop strategies for improvement, where necessary.



### Benefit

Expanding the utilization of dashboarding across the Assessor Office will have a number of key benefits:

- It will support the consolidation of crucial information into one key dashboard, which may reduce data fragmentation and increase staff efficiency in obtaining required data timely.
- It may also enhance cross-department collaboration, particularly with the Property Tax Division of Auditor Controller's Office. Updating the dashboard with key historic trends and shared data points that influence property tax revenue may support the Auditor Controller in developing property tax projections utilizing an approach more aligned with predictive analytics.

### Current State

The Assessor Office is currently responsible for identifying, assessing, and periodically valuing all taxable real and personal property in order to produce the secured and unsecured assessment rolls. This process involves identifying new construction, inspecting properties, reviewing comparable values, and collecting data on sales transfers. Once completed, the assessment roll is provided to the Auditor Controller, who determines property tax fees for the community based on the assessment roll.

#### Internal Dashboarding

Across interviews, staff reported data fragmentation as a key challenge in completing appraisals and consistently satisfying the responsibilities of the Assessor Office. For example, as a result of this data fragmentation, appraisers and supervisors are required to utilize various systems to collect the data necessary to complete key activities. This data includes comparable sales, potential new construction, property sales, and data required to forecast future workload. As a result, current processes often create increased workload for staff and the potential for reduced timeliness in appraisal finalization.

#### Cross-departmental Shared Dashboarding

Currently, the Auditor Controller obtains access to assessed values data from the Assessor Office on June 30 of each year, as required by law. However, the Fiscal Year begins on July 1 and budgets are developed eight months prior in September of each year. As a result, the Auditor Controller often faces challenges in accurately projecting property tax revenues. During interviews, staff across the Assessor Office and the Auditor Controller's Office noted key challenges in data sharing due to limited integration between Aumentum, which is utilized by the Auditor Controller's Office for property tax reporting, and APS, which is utilized by the Assessor Office.

Furthermore, it is important to note that property assessments and consequently property tax revenues are driven by several factors, including market conditions, property transfer tax, and supplemental property tax growth, each of which are challenging to accurately predict in the absence of historical trend data across multiple years or predictive analytics capabilities. In recent times, the Assessor Office has developed a dashboard that tracks trends in market information, such as property sales rates over time. While the development of this dashboard is commendable, it is in its infancy and does not include key data points related to comparable sales, trends in new construction, and historic trends in number of assessments completed that may reduce data fragmentation. These data points may support the Auditor Controller's Office in applying predictive capabilities to project future property tax revenues.

Difficulties in projecting accurate property tax revenue may have the potential to impact long-term financial planning and decision-making by the County, including the cost-effective management of County debt and investment.

## Recommendation

### Internal Dashboarding

Internally, there is an opportunity for the Assessor Office to consider additional data points for inclusion within the existing dashboard. In considering these data points, the Assessor Office should consider engaging front line staff to identify key data points that would support staff in conducting appraisals more efficiently and/or accurately.

### Cross-departmental Shared Dashboarding

In the future state, there is an opportunity for the Assessor Office to enhance collaboration with the Auditor Controller's Department to develop a shared dashboard that tracks trends in certain historic data across multiple years that would be beneficial in predicting future property tax revenues. In time, the dashboard may be expanded to provide predictive analytic capabilities based on machine learning.

## Suggested Action Steps to Implement Recommendation

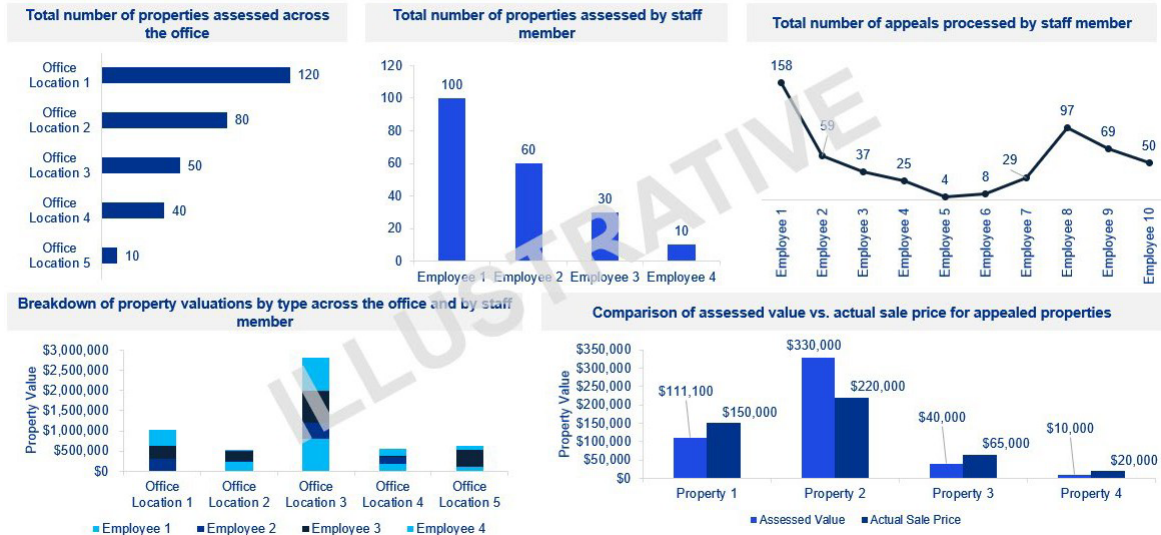
### Internal Dashboarding

#### **Action one: Define the key data points and outputs that will be tracked within the dashboards.**

As a first step, the Assessor Office should consider the key data points and outputs that will be visualized on the dashboard. In considering these data points, the Assessor Office may consider engaging with key staff across the Office to identify and prioritize the most crucial data points for inclusion with the dashboard. This may be undertaken by holding staff focus groups or issuing a staff survey. However, examples of data for consideration on each dashboard are included below:

- Total number of properties assessed across the office and by staff member
- Breakdown of property valuations by type across the office and by staff member
- Total number of appeals processed by staff member
- Comparison of assessed value versus actual sale price for appealed properties.

# Assessor Dashboard



**Action two: Identify a key division representative(s) who will collate data for inclusion within the dashboard.** The Assessor Office should assign a staff member to expand the dashboard to include recently identified data points. They should also update the dashboard design to allow for future features. Additionally, the staff member responsible for dashboard expansion should consider collating and assessing data for accuracy before adding it to the dashboard on a regular basis.

**Action three: Develop a management and usage policy for the dashboard.** Management and authorized use of the dashboard should be outlined within a policy and—if necessary—accompanying procedures.

**Action four: Communicate the purpose and benefits of the dashboard and provide necessary training.** Management should communicate the purpose and benefit of the dashboard to Assessor Office staff, and usage expectations (aligned with policies and procedures developed under Action three, above). Additionally, the Assessor Office should provide thorough training to users.

## Cross-departmental Shared Dashboarding

**Action five: Collaborate with the Auditor Controller Department and the CEO’s Office to develop shared data points for inclusion with the dashboard.** The Assessor Office may consider engaging with the Auditor Controller’s Department to establish a working group to collaboratively identify the key data points and metrics to be included within a shared dashboard. The Department may also consider engaging the CEO’s Office as part of this working group given that the CEO’s Office helps manage discretionary revenues, which include property taxes. Examples of such key data points include:

- Property tax growth rates
- Property sales
- Property transfer as a result of death/gift, etc.
- Property tax assessment values
- Property transfer tax.

**Action six: Coordinate with the Auditor Controller’s Department to update the existing dashboard to include the data points identified above.** Having identified key data points to track,

the Workgroup established under Action five above should develop a plan to update the existing dashboard. This may involve undertaking the following key steps:

- Identifying a Product Owner
- Identifying the roles and responsibilities of each department as it relates to developing and maintaining the dashboard
- Establishing the aims, objective, customers, user stories, functions, and features of the product
- Establishing a timeline for completion
- Considering developing data-sharing agreements across departments outlining the key data points to be shared, the mechanisms for sharing, as well as the purpose, and departmental roles and responsibilities related to data sharing; these data-sharing agreements should also consider the privacy and confidentiality of data and appropriate access controls for the dashboard, where necessary
- Identifying a staff member across the departments who will be responsible for reviewing both current and future data for inclusion in the dashboard to allow for the proactive identification of trends
- Developing policies and procedures for the shared dashboard, and how/where it will be embedded in Department processes. Policies and procedures should provide an explanation of dashboard purpose as well as a definition of each key data point visualized within the dashboard
- Identifying Controller staff who will be responsible for updating the dashboards, and the frequency within which the dashboard will be updated.

**2.3 Enhance processes to communicate promotion requirements to staff to increase awareness and application.**

**Benefit**

Enhancing processes in place to communicate promotion requirements and pathways to staff and continuing to support career growth across the Assessor Office will have a number of key benefits:

- It may strengthen the pipeline of qualified, experienced, and motivated staff members who are ready to assume higher roles. In turn, this will help improve operational continuity.
- It may enhance staff retention by improving staff understanding of promotion requirements, building confidence in the process and motivation to pursue promotion pathways.

**Current State**

An Appraiser III may be required to undertake and support appraisals across a wide range of property types. Therefore, promotion requirements are thorough and wide-reaching. Per documented guidance, the promotion process for an Appraiser II to be promoted to an Appraiser III requires the achievement of specific criteria, including trainings, workplan development, and participating in an interview process. It also requires candidates to conduct a specified number of assessments on property types that may be outside of their assigned specialty area, such as hotels, offices, and other commercial units. Finally, appraisers seeking promotion must demonstrate proficiency across a range of applications, including Excel, Word, Apex, APS, Segregations of Value, and much more.

While the Assessor Office has documented guidance on promotion requirements as outlined above, across interviews, staff reported limited clarity on the promotion process including its key requirements. Evidently, they often reported varying and conflicting preconditions, and perceptions that preconditions

are inconsistently applied to staff vying for consideration. Staff also reported that varied understanding of the promotion processes and low confidence in the integrity of the process often deters staff from pursuing or communicating their intent for promotion.

These combined factors are likely contributing to a reduced number of staff members seeking promotion. This is evidenced by the fact that the Department currently employs only one Appraiser III. In addition, while data related to number of promotes over the past number of years was not provided by the Assessor Office, staff reported minimal promotions in recent times and a reluctance to participate in the process—despite an interest in pursuing promotion. Resultantly, the Department has limited the available staff pool for supervisor succession in a competitive, specialized labor market—where external candidates may be difficult to attract. This may lead to the inability to backfill senior and supervisor positions in the event of staff attrition.

### Recommendation

In the future state, there is an opportunity for the Assessor Office to enhance processes in place to communicate promotion requirements and pathways. For example, in the future state, supervisors and management staff may consider embedding discussions surrounding promotion opportunities and requirements into the annual performance evaluation process. The Assessor Office may also consider assigning a supervisor to act as a mentor and a resource for staff members to ask questions on promotion pathways.

### Suggested Action Steps to Implement Recommendation

**Action one: Assign a supervisor to act as a mentor.** As a first step, the Assessor Office should consider assigning a supervisor to act as a mentor and a resource for staff members to ask questions on the promotion process and clarify their understanding of key requirements. The assigned supervisor may also act as a guide for staff who are on a promotion pathway to support staff in having the necessary supports to achieve the requirements for promotion. In considering a supervisor to act as mentor, the Assessor Office may select a supervisor who has previously gone through the internal promotion process.

**Action two: Embed discussions on promotion opportunities within the annual performance review process.** Secondly, the Assessor Office may embed discussions surrounding promotion opportunities within the annual performance review process. This will provide leadership with an opportunity to remind staff of promotion requirements and opportunities. It may also act as a forum for staff to ask questions, clarify expectations, and clarify the activities required for a staff member to successfully promote.



# Elections

The below recommendations are associated with the Elections Office.

3.1	<b>Consider implementing a new logistics management system to improve processes and ease workload across the Elections Office.</b>
<b>Benefit</b>	
<p>Implementing a new logistics management system across the Elections Office will have a number of key benefits:</p> <ul style="list-style-type: none"> <li>• It will improve efficiency across equipment tracking, decreasing manual processes and making key information more readily accessible. In turn, this will enable data-driven decision-making in warehouse/storage management and the proactive identification of opportunities for improvement.</li> <li>• It will reduce workload for staff across the Elections Office, creating additional staff availability for other critical activities related to candidate filing, election administration, and voting equipment transportation coordination.</li> </ul>	
<b>Current State</b>	
<p>The Elections Office currently uses AssetTiger as its logistics management software to track and monitor elections equipment countywide. The equipment monitored includes certain items that cannot be delivered through a drayage company.</p> <p>Across interviews, staff reported that the current logistics management system lacks real-time item tracking capabilities, and can encounter tracking issues, specifically errors in scanning barcodes that can result in inefficient equipment monitoring and tracking processes. As a result of these issues, Elections Office staff must resort to a manual tracking system with paper logs to allow key assets to be consistently tracked and monitored. However, this process poses a number of challenges and implications for the Elections Office:</p> <ul style="list-style-type: none"> <li>• <b>Increased workload:</b> The reliance on a manual tracking system with paper logs adds administrative burden, requiring staff to spend time on manual data entry and locating equipment. This undoubtedly results in increased staff workload, reducing available time to be spent on other important tasks, such as coordinating ballot delivery, setting up polling stations, and arranging transportation of other equipment.</li> <li>• <b>Risk of delays:</b> Relying on manual equipment tracking processes can introduce and increase the risk of human error. This can result in difficulties in locating key equipment when required, as well as increasing staff workload in remedying these potential errors. In turn, this can lead to potential delays in the setup of equipment and related polling stations.</li> </ul>	
<b>Recommendation</b>	
<p>In the future state, there is an opportunity for the Elections Office to proactively consider the implementation of an alternate logistics management system that aligns to Elections Office needs. In considering an alternate system, the Elections Office may consider conducting a gap analysis to identify the key challenges with the current system and key requirements of any alternate solution. This process may also include soliciting an RFP process, identifying funding sources, developing an internal</p>	

implementation plan, and collaborating with the selected vendor to effectively implement the chosen solution.

### Suggested Action Steps to Implement Recommendation

**Action one: Conduct a gap analysis to pinpoint key challenges with current logistics system and identify key future system requirements.** As a first step, the Elections Office may consider conducting a gap analysis to identify and pinpoint the specific challenges with the current system and identify the key requirements of any new system. In conducting this gap analysis, Elections Office leadership should engage key staff who utilize the logistics management system regularly to discuss current challenges and future system critical needs. Based on engagement with staff, Elections Office leadership should develop a list of key requirements, prioritized based on critical capabilities versus “nice to have” capabilities.

**Action two: Conduct a cost-benefit analysis and solicit an RFP process.** Having conducted a gap analysis under Action one, Elections Office leadership should conduct a cost-benefit analysis to consider the potential costs of implementing a new system, as well as available funding sources. This may involve undertaking the following key steps:

- **Step one:** Conduct market research to identify available logistics management systems and estimated system and implementation costs.
- **Step two:** Identify the cost of operating the current logistics management system, including time spent on manual processes and related costs.
- **Step three:** Evaluate the benefits of adopting an alternate logistics management system, including reduced manual workload, streamlined processing, and enhanced equipment tracking and management.
- **Step four:** Coordinate with the CEO's Office to present the cost-benefit analysis and considering funding sources for the adoption of an alternate system.
- **Step five:** Coordinate with the Purchasing Department to solicit an RFP process. The RFP solicitation should include detailed information on the key requirements for the desired logistic management system, proposed timeline for implementation, as well as expected cost. The RFP should also include detailed information on mechanisms that will be utilized to score RFP responses in order to select the successful vendor and system.
- **Step six:** Select the appropriate vendor and related solution.

**Action three: Develop an implementation plan:** Once a system has been procured, the Department should identify a key staff member(s) to manage the selected vendor, and to support the vendor in developing an implementation plan to guide the transition. At a minimum, the implementation plan should:

- Identify plan goals and objectives
- Define roles and responsibilities of Elections Office staff supporting implementation
- Identify key users, user stories, functions, and features
- Identify key actions, functionalities, and tasks for adoption/completion
- Develop timeline/roadmap for completion of each action
- Allocate resources to implementation priorities as requirements and resources permit
- Include a risk assessment tool to allow the division to proactively identify and efficiently mitigate risks and challenges
- Define standards and metrics by which success will be measured.

**Action four: Implement the logistic management system in collaboration with the selected vendor.** Finally, after developing the implementation plan, the Elections Office should closely

collaborate with the select vendor to implement the new logistics management system. At a minimum, implementation should consider user adoption, data migration, testing, training, and ongoing maintenance. Furthermore, the Elections Office should consider adopting a phased approach to implementation that begins with the tracking of larger or more expensive election equipment, such as electronic voting systems, ballot scanners, and portable voting booths. All phases of implementation should also be accompanied by a detailed piloting and testing phase to allow for system challenges to be proactively identified and resolved, along with relevant information security testing and assurance processes.

**3.2 Consider alternate approaches for elections equipment transportation to support the timely distribution of elections equipment.**

**Benefit**

Considering alternate approaches for election equipment transportation will result in a number of potential benefits for the Elections Office:

- It will support reliable movement of elections materials during election cycles, minimizing challenges associated with box truck availability, making polling stations' setup more efficient.
- It will also reduce the requirement to source trucks from multiple vendors, streamlining the election equipment distribution process by making it more consistent, predictable, and reliable.
- It will release significant staff time by eliminating the need for extensive and continual management of vehicle rental collections and returns. This will allow staff to redirect focus toward other critical election tasks, such as polling place setup.
- It may improve County purchasing power and subsequently reduce costs.

**Current State**

In the current state, the Elections Office is required to transport critical elections equipment such as polling booth equipment and election personnel supplies from a central warehouse located in Santa Barbara to various polling stations located across the County. During the last election cycle in 2022, the Elections Office prepared, managed, and transported equipment to 86 polling stations across the County. In order to transport this equipment, the Elections Office relied, and continues to rely, upon renting box trucks from various vendors. These vendors include Penske, Budget, U-Haul, and Enterprise—all of whom have established operations in varying locations across the County. Across interviews, staff reported a number of key challenges with the current equipment transportation process:

- There is often limited box truck availability across the County. As a result, staff spend significant time contacting various vendors in order to locate a truck(s) and must engage multiple vendors at one time to source the number of box trucks required to meet the need. This also results in increased back-office administrative processes, including processing multiple invoices and related payments, reviewing multiple sets of agreements/terms and conditions, etc. Finally, it prevents the Elections Office from benefiting from competitive pricing and cost efficiencies through negotiating a standing commercial agreement with a sole vendor and/or economies of scale with key vendors.
- Furthermore, the current method of sourcing trucks through multiple vendors and locations incurs considerable staff time and workload. For example, interviewees reported spending up to six hours per truck on activities related to obtaining the required box trucks from rental agencies. This includes travelling to collect a rental truck(s), engaging with the vendor, completing the necessary



documentation and administrative processes, travelling back to Elections Office location, and returning the truck to the rental agency following the completion of the election cycle.

The current process results in significant inefficiencies in the utilization of staff time, which could be redirected toward other key activities related to voter equipment maintenance and security and election day operations. Additionally, it may result in increased cost for the Elections Office in the absence of a standing agreement with a sole vendor that may provide more competitive pricing. Finally, it may increase the risk of delays in transporting election equipment due to limited availability of box trucks in periods of high demand.

### Recommendation

In the future state, the Elections Office may conduct a cost-benefit analysis across a number of alternative transport options to decrease the challenges posed by the existing processes as it relates to equipment transportation. This may include establishing standing commercial rental agreements or partnerships with local truck rental agencies to enable consistent availability during peak times, competitive pricing, and reduced administrative processing. Alternatively, the Elections Office may consider engaging with the CEO's Office and other key departments such as General Services, Public Works, and Community Services to assess the feasibility of procuring box trucks through long-term lease or purchase.

### Suggested Action Steps to Implement Recommendation

**Action one: Collaborate with Purchasing and General Services to conduct a needs assessment to determine the feasibility of procuring countywide box trucks.** The Elections Office may consider collaborating with the Purchasing Department, General Services Department, and other County departments as necessary, such as Community Services and Public Works, to determine whether a business case exists to purchase or lease box trucks in the long term as well as the cost-benefit of this action. Undertaking this action may involve the following key steps:

- **Step one:** As a first step, the Elections Office, in collaboration with Purchasing and General Services, should identify other key County departments that based on operations may have use for box trucks. Such departments include but are not limited to Community Services and Public Works.
- **Step two:** The Elections Office in collaboration with those departments identified under step one should establish a dedicated workgroup to plan and complete the needs assessment.
- **Step three:** Having established a dedicated workgroup with cross-departmental representation, the workgroup should identify needs assessment objectives, as well as mechanisms to conduct the needs assessment. Such mechanisms may involve issuing a survey to key staff across departments to understand need for box trucks and holding focus groups with staff and department leadership to understand cross-department need.
- **Step four:** As a next step, the workgroup established should analyze the result of the needs assessment and should consider the number of box trucks (if any) required countywide and their anticipated usage throughout the year.
- **Step five:** The workgroup should conduct market research to understand the cost of both purchasing box trucks and procuring box trucks via long-term lease. The associated cost of these options should also be considered, such as vehicle registration, taxes, depreciation, insurance, storage, etc. Each department's share of this cost should also be estimated and calculated.

- **Step six:** As a next step in this process, the workgroup should conduct a cost-benefit analysis to understand the benefit of (a) purchasing box trucks countywide or (b) obtaining box trucks via long-term lease.
- **Step seven:** Once the most fiscally sustainable option has been considered as a result of the cost-benefit analysis, the departments in collaboration with the Purchasing Department should solicit an RFP process per the County's policies and procedures.

Alternatively, the needs assessment may find that box trucks are not required across countywide departments. In this instance, the Elections Office should undertake an internal cost-benefit analysis to understand most fiscally beneficial next steps for the Department as outlined in Action two below.

**Action two: Conduct a cost-benefit analysis to consider suitable options for obtaining consistent and cost-effective access to box trucks in the Elections Office, as needed.** If a countywide need for box trucks is not identified in Action one, then the Elections Office may consider conducting an internal cost-benefit analysis to assess the feasibility and cost effectiveness of establishing standing commercial agreements with a local vehicle rental agency. The Elections Office should assess the cost-benefit of partnering with local vehicle rental agencies to establish priority rental agreements or similar partnerships, which would provide consistent access to rental trucks during peak times or in high-demand areas. Considering this option may involve the following key steps:

- **Step one:** Identifying key rental agencies throughout the County that can provide consistent truck rental services that meet the needs of the Elections Office.
- **Step two:** With the support of the Purchasing Department, the Elections Office leadership may initiate discussions with each rental agency identified to assess the number of rental trucks available, rental fees, terms and conditions, and other relevant factors.
- **Step three:** As a next step, Elections Office leadership should solicit an RFP process and assess rental agencies based on the factors identified under step one above to identify the rental agency that provides rental trucks that best meet Election Office requirements.
- **Step four:** Having identified the rental agency that best meets the needs of the Elections Office, leadership should identify the cost as well as the benefit of establishing a standard commercial agreement with the rental agency versus leasing trucks on a long-term lease in collaboration with other departments as outlined in option two below.

**Action three: Based on the results of the cost-benefit analysis, make a decision on the future approach to box truck rental.** As a next step, Elections Office leadership should review the results of the cost-benefit analyses. Where establishing commercial agreement is considered the optimal solution based on the outcome of Action two, the following next steps should be undertaken:

- **Step one:** The Elections Office should collaborate with County Council to develop a rental agreement with the rental agency chosen based on the analysis undertaken within Action one. This agreement should include specifications for the type and number of trucks needed, time period(s) during which they will be required, rental duration, rental fees, and other relevant terms required by the Elections Office.
- **Step two:** Once the rental agreements have been established and agreed upon by all parties, including the Board of Supervisors, where necessary, the Elections Office should provide guidance and training to staff on the update process for box truck rental. This will help staff to consistently engage the rental agency with whom the Elections Office holds the commercial agreement.

### 3.3

Collaborate with the CEO's Office and other complementary County departments to consider alternate storage options for elections equipment.

#### Benefit

Collaborating with the CEO's Office and other complementary County departments to consider alternate storage options for elections equipment will offer a number of key benefits:

- It may eliminate the need for staff to transport equipment between multiple locations from one storage location to another, enabling staff to continue to have safe, efficient, and timely access to resources necessary for the setup and operation of polling stations.
- It will enhance the organization and distribution of election equipment, so that sufficient space continues to exist for ease of access to elections equipment, enabling more effective inventory management.

#### Current State

In 2007, in an attempt to expand existing storage facilities, the Elections Office took over a County Building, obtained a loan to complete refurbishments, and remodeled the building to align to its needs. In addition to this refurbishment, the Elections Office, with the support of Department funds, constructed a warehouse to store critical elections equipment.

Despite efforts to expand available storage facilities throughout the years, interviewees reported that the Elections Office continues to experience significant storage and picking space constraints. For example, election equipment, such as e-poll books, voting machines, and ballot counters/scanners, are currently stored in different locations. One location is 16,000 square feet while the other is approximately 12,000 square feet and both store key election equipment. Additionally, two secured shipping containers are utilized as overflow. Storage constraints are further exacerbated during election cycles when additional equipment and supplies are required.

The current storage space constraints result in a number of key challenges and implications for the Elections Office:

- **Inventory management and movement challenges:** The storage space constraints result in elections equipment being compacted into small spaces that are difficult to access and maneuver. This can create difficulties in efficiently inventorying, storing, and picking equipment, and can result in equipment misplacement.
- **Poor utilization of staff time:** Staff members reported spending significant time rearranging and reallocating space to allow for effective election equipment storage and setup. This requires significant movement of equipment between storage locations by permanent and temporary staff. This practice also adds complexity to both inventory management and tracking.

#### Recommendation

KPMG understands that the County is in the process of designing a new Elections Precinct Office. KPMG also understands that the Elections Office has recently engaged General Services with regards to the storage challenges being faced as well as the potential changes which may be brought about by

a recently developed Facility Master Plan. The Master Plan provides a framework for development at a key location over the next twenty years. In the future, the Elections Office should engage with the CEO's Office and other key departments involved in the planning process to proactively build storage need into building design. Additionally, there is an opportunity for the Elections Office to continue to collaborate with the CEO's Office and other relevant County departments such as General Services and Planning and Development to evaluate alternative storage options for election equipment.

**Regarding Suggested Action Steps to Implement Recommendation**

**Action one: Proactively engage with the CEO's Office and other key departments regarding the design of the future Elections Precinct Office.** KPMG understands that the County is in the process of designing a new Elections Precinct Office (Precinct Office). As part of the design and development phase of this Precinct Office, the Elections Office should engage with the CEO's Office and other key departments involved in the planning process to proactively build storage need into building design. Prior to engagement, the Elections Office should consider the specific amount of storage it currently needs and may need in the future. This may involve undertaking the following:



Once the above exercise is complete, the Elections Office may engage with the CEO's Office, County departments, and/or third-party consultants involved in the Precinct Office design to effectively and sustainably build the required storage space into building design.

**Action two: Assess whether the County has available space.** In the meantime, prior to the development of the Precinct Office, the Elections Office should also collaborate with the CEO's Office and other County departments such as General Services to assess the availability of additional available warehouse space across the County. This assessment should include an evaluation of the existing warehouse space to determine appropriateness for election equipment storage. Additionally, the Elections Office should investigate alternative nearby warehouse options so that they can utilize a cohesive storage solution that meets storage needs while minimizing transportation of election equipment between different storage locations.

**3.4 Explore additional channels for recruiting temporary staff to increase labor pools and continue to attract candidates with highly transferable skill sets.**

**Benefit**

- Exploring additional channels for recruiting temporary staff across the Elections Office will have a number of key benefits:
- It will improve access to more experienced candidates and those who are interested in the election process, which will help expand the labor pool and improve the efficiency of the election process.

- It will aid current training efforts, positioning election workers to continue to be equipped with the knowledge and skills required to most effectively and efficiently fulfill their roles.

### Current State

The Elections Office is currently budgeted for 21 full-time employees. However, given that an election cycle results in a significant increase in workload, the Elections Office is required to recruit a large number of temporary and extra help employees to support the process. For example, the Elections Office engages Robert Half, a recruitment agency, to recruit between 80 and 100 temporary employees to act as poll workers. The County also recruits poll workers through its County Employee Poll Worker Program. However, the Elections Office reports that the program has limited uptake among County staff. Concurrently, the Elections Office internally recruits for a varying number of extra help staff to support Elections Office operations based on the election type and office needs prior to each election cycle. These internally recruited extra help employees typically undertake activities related to data entry, voter registration, phone bank related tasks, and front counter support.

In recent times, the Elections Office has faced several challenges in recruiting experienced staff with an interest or background in the election process due to increased labor market competitiveness. As a result, staff reported that the individuals recruited may exhibit frequent tardiness and unscheduled absences among many of the employees recruited. I

In addition to the challenges faced with regard to the recruitment of staff, interviewees reported that temporary staff require frequent retraining and oftentimes make consistent errors across similar activity areas. However, while the Elections Office facilitates a dedicated training program for temporary staff, it is not regularly reviewed or evaluated to enhance training across areas where consistent errors take place. Furthermore, the training program is not evaluated by temporary workers via surveys to allow the Elections Office to identify where areas of improvement across trainings may be implemented.

The recruitment and training challenges faced by the Elections Office have resulted in increased workload for existing staff. In addition to their regular duties, Elections Office staff reported spending significant time training and retraining temporary workers, conducting regular process reviews to increase accuracy, covering absences, and undertaking other unscheduled tasks. This reduces the time available for existing staff to spend on more high-priority activities such as election planning and administration. It may also result in the potential for overtime during election cycle, which could create increased cost for the Elections Office.

### Recommendation

These opportunities may include partnering with local colleges and universities to attract individuals that may be studying election-related courses, increasing awareness of the County Employee Poll Worker Program, and conducting regular reviews of the training program offered to temporary workers.

### Leading Practice

**Guam:** To address the staffing challenges for 2022 General Election, the Guam Election Commission collaborated with the University of Guam Public Administration Degree Program. They offered an academic credit-bearing course on Elections Administration as an innovative approach to recruit poll

workers. The two-credit course included 12 hours of lectures at the University, a practical exam, and a practicum, which involved working as a Precinct Official or Election Assistant on election day<sup>2</sup>.

**Charleston County, South Carolina:** Charleston County offers employees an opportunity to serve as election workers without using their paid time off. This decision was taken not only to expand the pool of poll workers but also to strengthen the relationships among the county's employees. The program allowed for the provision of reliably staffed polling locations, reducing the administrative burden and minimizing the time and effort spent on recruiting and retaining poll workers by employing traditional methods.<sup>3</sup>

### Suggested Action Steps to Implement Recommendation

**Action one: Partner with local colleges and universities to recruit temporary workers with transferable skills.** The Elections Office may consider partnering with local universities to offer temporary positions to students who may be studying courses related to elections administration. As part of this course, students who take up a temporary position with the County during election cycles may receive course credits. This strategy can support the expansion of the current labor pool and will provide students with practical experience relevant to their coursework. This process would require Elections Office leadership to undertake the following key steps:

- **Step one:** Engage with local colleges and universities to identify whether suitable elections administration or similar courses are offered across the County.
- **Step two:** Engage with the course coordinator across suitable courses to consider how the practical experience of working on an election cycle can be embedded into the relevant coursework.
- **Step three:** In collaboration with the relevant college or university, consider the incentive and benefit that would be offered to students for working on election cycles.
- **Step four:** In collaboration with the relevant college or university, consider how the Elections Office will report to the college/university on student performance.

Elections Office leadership should also engage with local universities and colleges to host on-campus recruitment events. During these events, students could meet Elections Office staff, learn about the election process, and receive more information regarding temporary and future permanent job opportunities.

**Action two: Collaborate with the CEO's Office to increase awareness of the Employee Poll Worker Program.** Prior to the commencement of the election cycle, the Elections Office should collaborate with the CEO's Office to increase awareness and encourage County staff to participate in the Employee Poll Worker Program. This may involve issuing targeted communications countywide, developing posters for distribution and display throughout County offices, and engaging leadership across County departments requesting that they remind employees of the opportunity to participate. In the future, the Elections Office may also engage with the Human Resources Department to position staff who are being onboarded to the County to be aware of the existence of the Employee Poll Worker Program.

**Action three: Regularly evaluate the training program offered to temporary elections workers.** Finally, the Elections Office should consider regularly reviewing the training offered to temporary workers during election cycles—including the gathering and incorporation of feedback from staff. This may involve engaging with Elections Office managers and supervisors to identify key areas of

<sup>2</sup> <https://www.eac.gov/election-officials/eac-clearinghouse-award-winners-2022>

<sup>3</sup> <https://www.eac.gov/election-officials/eac-clearinghouse-award-winners-2022>

challenge for temporary staff and updating the training to provide an increased focus on these challenge areas. The Elections Office should also consider conducting a survey after the completion of the training courses to request feedback from attendees on how training may be improved. Alternatively, the Elections Office may collaborate with the Human Resources Department to include a request for feedback on training to be provided as part of any potential exit interview.

**3.5 Perform a fee study to identify an optimal billing methodology, reimbursement rate(s), and supporting weight factors that align to election cycle cost.**

**Benefit**

Performing a fee study to identify an optimal billing methodology and related reimbursement rates and weighting factors will result in a number of key benefits:

- It will support the Elections Office in identifying optimal reimbursement rates and a billing methodology that enables the Elections Office to receive appropriate reimbursement for costs. In turn, this may support the Elections Office in reducing reliance upon County general fund dollars, allowing funding to be redirected toward other Department or County programs while enabling the Elections Office to have the funding required to support efficient and effective operations.

**Current State**

Currently, the Elections Office receives reimbursement from participating jurisdictions for services and resources rendered during an election cycle in order to cover a portion of election operational costs. In considering reimbursement amounts, the Election Office utilizes a predefined reimbursement rate and assigns varying weighting factors based on election type, which ultimately impacts the amount that can be charged. In 2005, the Elections Office contracted with a third-party consulting firm to perform a fee study with the aim of identifying optimal reimbursement rates and related weighting factors. The resulting fee study recommended a billing methodology, including proposed reimbursement rates and weighting factors that were approved by the Board of Supervisors in FY 2006–2007. These approved rates and weighting factors continue to remain in effect.

However, during interviews, staff reported that current reimbursement rates and weighting factors are outdated and are no longer sufficiently aligned to the current election expenses. Furthermore, based on analysis completed by the Elections Office and provided to KPMG, the County has one of the lowest reimbursement rates in the State, ranking 37th out of 42 counties surveyed by the California Association of Clerks and Elections Officials. As a result, the Elections Office currently faces the following challenges and implications:

- **Increased candidate filing fees:** Interviewees reported that low reimbursement rates have resulted in increased candidate filing fees, which may create financial obstacles for potential candidates. This may result in a reduced candidate pool.
- **Increased reliance on the general fund:** Low reimbursement rates can increase reliance on general fund dollars, reducing funding available for redirection to other Department programs and initiatives. For example, in FY 2021–2022, the Office was designated \$1.1 million in general fund dollars; this was significantly lower than general fund dollars provided in FY 2019–2020 during the presidential election cycle, which amounted to \$2.5 million.

The cumulative effect of the potential for reduced candidate participation and increased burden on general fund dollars emphasizes the importance of a thorough evaluation of reimbursement rate process.

## Recommendation

In the future state, there is an opportunity for the Elections Office to conduct an update fee study with regard to reimbursement rates. The fee study should identify an optimal billing methodology with appropriate reimbursement rates and weighting factors aligned to current election cycle cost, particularly taking into account the cost-of-living increases since 2005. The Elections Office may consider undertaking this analysis internally or engaging a third-party consultant for the purposes of completion.

## Suggested Action Steps to Implement Recommendation

**Action one: Perform a fee study to evaluate the current reimbursement billing methodology and reimbursement rates.** The Elections Office may consider performing a fee study to assess the current reimbursement billing methodology and consider whether it aligns to current election cycle cost based on election type. The study finding should inform whether current billing methods and rates should be modified. Undertaking this action will require the following key steps:

- **Step one:** Consider whether the Elections Office has the capacity and expertise to conduct this fee study internally or whether a third-party consultant should be engaged to perform the study. Where it is considered that a third-party consultant should be engaged, the Department will be required to solicit an RFP process.
- **Step two:** Regardless of whether the study will be performed internally or by a third-party consultant, the goals of the study should be clearly defined. These goals may include identifying an optimal billing methodology and supporting reimbursement rates that will enable financial sustainability.
- **Step three:** Gather relevant data on current reimbursement rates, weighting factors, billing methods, and reimbursement rate revenue, as well as current election cycle operating cost by election type over a five-year period or other period to be defined by the Elections Office.
- **Step four:** Conduct benchmarking to identify reimbursement rates and billing methodologies adopted by other California counties to inform future potential methodology options.
- **Step five:** Develop a billing methodology and proposed reimbursement rates that align to election cycle expenses and will support continued fiscal sustainability.

**Action two: Present fee study results and recommended changes to the Board of Supervisors for approval.** Once the fee study has been completed, the Elections Office should develop a board letter with key background information on the current reimbursement rate system and the challenges faced for presentation to the Board of Supervisors. The board letter should also present the results of the fee study and identify the proposed future updates to the billing methodology and reimbursement rates for Board approval. Following Board approval, the Elections Office should communicate the updates to each jurisdiction and hold meetings or focus groups with the key jurisdiction representatives to answer any potential queries, as necessary.





# Appendix

## Department Recommendation Table

Department recommendations relate to the systems and processes needed for the Department to more efficiently manage its operations and provide services to County residents. The following table outlines the recommendations and related actions for each office, including (1) Clerk-Recorder Office, (2) Assessor Office, and (3) Elections Office.

#	Department Recommendations
<b>Clerk-Recorder Office</b>	
1.1	<p>Continue to pursue opportunities for transition toward digital vital record copies to reduce reliance on paper confirmation, reduce risk, and reduce time needed to confirm records.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Conduct a needs assessment for the digitization of vital records.</li> <li>• <b>Action two:</b> Conduct a strategic cost-benefit analysis to determine the feasibility of the initiative and report results to Department and County leadership.</li> <li>• <b>Action three:</b> Establish a program with seed funding to manage the transition toward digital records.</li> <li>• <b>Action four:</b> Engage key stakeholders and establish a dedicated collaborative.</li> <li>• <b>Action five:</b> Seek funding.</li> <li>• <b>Action six:</b> Consider mechanisms to design and develop a blockchain platform or solution for the digitization of vital records.</li> <li>• <b>Action seven:</b> Design, build, implement, and sustain the selected solution.</li> </ul>
<b>Assessor Office</b>	
2.1	<p>Enhance staff productivity tracking processes to improve consistency in evaluating staff performance and support proactive identification of process inefficiencies.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Conduct a detailed time study to provide a data-driven understanding of how staff are spending their time.</li> <li>• <b>Action two:</b> Undertake a process assessment for appraiser activities to evaluate current process efficiency.</li> <li>• <b>Action three:</b> Develop baseline performance metrics and targets.</li> <li>• <b>Action four:</b> Task supervisors to engage collaboratively with staff on a biweekly basis to evaluate performance.</li> </ul>

2.2	<p>Expand the utilization of dashboarding to enhance data-sharing mechanisms and reduce data fragmentation both internally and cross-departmentally.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Define the key data points and outputs that will be tracked within the dashboards.</li> <li>• <b>Action two:</b> Identify a key division representative(s) who will collate data for inclusion within the dashboard.</li> <li>• <b>Action three:</b> Develop a management and usage policy for the dashboard.</li> <li>• <b>Action four:</b> Communicate the purpose and benefits of the dashboard and provide necessary training.</li> <li>• <b>Action five:</b> Collaborate with the Auditor Controller’s Department and the CEO’s Office to develop shared data points for inclusion with the dashboard.</li> <li>• <b>Action six:</b> Coordinate with the Auditor Controller’s Department to update the existing dashboard to include the data points identified above.</li> </ul>
2.3	<p>Enhance processes to communicate promotion requirements to staff to increase awareness and application.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Assign a supervisor to act as a mentor.</li> <li>• <b>Action two:</b> Embed discussions on promotion opportunities within the annual performance review process.</li> </ul>

**Elections Office**

3.1	<p>Consider implementing a new logistics management system to improve processes and ease workload across the Elections Office.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Conduct a gap analysis to pinpoint key challenges with current logistics system and identify key future system requirements.</li> <li>• <b>Action two:</b> Conduct a cost-benefit analysis and solicit an RFP process.</li> <li>• <b>Action three:</b> Develop an implementation plan.</li> <li>• <b>Action four:</b> Implement the logistic management system in collaboration with the selected vendor.</li> </ul>
3.2	<p>Consider alternate approaches for elections equipment transportation to support the timely distribution of elections equipment.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Collaborate with Purchasing and General Services to conduct a needs assessment to determine the feasibility of procuring countywide box trucks.</li> <li>• <b>Action two:</b> Conduct a cost-benefit analysis to consider suitable options for enabling consistent and cost-effective access to box trucks in the Elections Office, as needed.</li> <li>• <b>Action three:</b> Based on the results of the cost-benefit analysis, make a decision on the future approach to box truck rental.</li> </ul>

3.3	<p>Collaborate with the CEO's Office and other complementary County departments to consider alternate storage options for elections equipment.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Proactively engage with the CEO's Office and other key departments regarding the design of the future Elections Precinct Office.</li> <li>• <b>Action two:</b> Assess whether the County has available space.</li> </ul>
3.4	<p>Explore additional channels for recruiting temporary staff to increase labor pools and continue to attract candidates with highly transferable skill sets.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Partner with local colleges and universities to recruit temporary workers with transferable skills.</li> <li>• <b>Action two:</b> Collaborate with the CEO's Office to increase awareness of the Employee Poll Worker Program.</li> <li>• <b>Action three:</b> Regularly evaluate the training program offered to temporary elections workers.</li> </ul>
3.5	<p>Perform a fee study to identify an optimal billing methodology, reimbursement rate(s), and supporting weight factors that align to election cycle cost.</p> <ul style="list-style-type: none"> <li>• <b>Action one:</b> Perform a fee study to evaluate the current reimbursement billing methodology and reimbursement rates.</li> <li>• <b>Action two:</b> Present the fee study results and recommended changes to the Board of Supervisors for approval.</li> </ul>

Figure 10: Source: KPMG

## County Benchmarks

### Clerk-Recorder

Benchmark comparisons were conducted with the eight comparison counties specified in our contract at the request of the CEO's Office. However, it should be noted that not all County budgets present information on budget and staffing at the individual program level. Placer, Marin, Santa Cruz, and Tulare counties do not provide a distinctive breakup of the Clerk-Recorder budgets in their respective budget documents. Additionally, Sonoma County and San Luis Obispo County did not provide a program-level breakdown for FY 2019–2020 and FY 2020–2021, respectively. Therefore, these counties and/or fiscal years have been excluded from the benchmarking outlined below.

	Budgets actual in '\$000	Santa Barbara	Average	Monterey	Solano	SLO	Sonoma
Recommended FY 2022–2023	Department FTE	24.50	16.16	17.00	15.00	16.65	16.00
	Percent of Enterprise	0.55%	0.43%	0.30%	0.46%	0.57%	0.38%
	Department Budget	3,921	3,241	3,300	2,579	2,386	4,701
	Percent of Enterprise	0.28%	0.22%	0.18%	0.19%	0.31%	0.22%
Adopted FY 2021–2022	Department FTE	20.50	16.54	17.00	16.00	17.15	16.00
	Percent of Enterprise	0.47%	0.45%	0.31%	0.51%	0.60%	0.39%
	Department Budget	3,478	3,050	3,126	2,376	2,345	4,354
	Percent of Enterprise	0.26%	0.22%	0.19%	0.19%	0.31%	0.21%
Actual FY 2020–2021	Department FTE	18.27	16.33	17.00	16.00	N/A	16.00
	Percent of Enterprise	0.46%	0.41%	0.31%	0.51%	N/A	0.39%
	Department Budget	3,139	3,121	3,027	2,202	N/A	4,135
	Percent of Enterprise	0.24%	0.20%	0.17%	0.22%	N/A	0.21%
Actual FY 2019–2020	Department FTE	17.93	16.60	17.00	16.00	16.80	N/A
	Percent of Enterprise	0.46%	0.48%	0.32%	0.52%	0.60%	N/A
	Department Budget	2,748	2,277	2,724	1,894	2,214	N/A
	Percent of Enterprise	0.24%	0.23%	0.16%	0.20%	0.34%	N/A

## Assessor

Benchmark comparisons for the Assessor Office were conducted with the eight comparison counties specified in our contract at the request of the CEO's Office. However, as noted, not all County budgets present information on budget and staffing at the individual program level. Marin and Tulare counties do not provide a distinctive breakup of the Assessor budgets in their respective budget documents. Additionally, Sonoma County did not provide a program-level breakdown for FY 2019-2020. Therefore, these counties and/or fiscal years have been excluded from the benchmarking outlined below.

	Budgets actual in \$'000	Santa Barbara	Average	Monterey	Solano	Placer	SLO	Santa Cruz	Sonoma
Recommended FY 2022-2023	Department FTE	57.00	59.72	52.00	48.00	83.00	82.50	26.00	66.80
	Percent of Enterprise	1.28%	1.79%	0.91%	1.49%	2.97%	2.84%	0.93%	1.60%
	Department Budget	9,611	10,220	7,731	8,917	16,601	11,775	3,929	12,365
	Percent of Enterprise	0.68%	0.84%	0.42%	0.67%	1.36%	1.51%	0.48%	0.58%
Adopted FY 2021-2022	Department FTE	58.32	58.72	52.00	48.00	79.00	82.50	26.00	64.80
	Percent of Enterprise	1.34%	1.80%	0.94%	1.53%	2.92%	2.90%	0.97%	1.56%
	Department Budget	9,298	9,760	7,425	8,943	15,961	11,088	3,670	11,476
	Percent of Enterprise	0.69%	0.86%	0.44%	0.70%	1.56%	1.47%	0.42%	0.54%
Actual FY 2020-2021	Department FTE	53.38	59.01	52.00	49.00	79.00	83.50	26.00	64.55
	Percent of Enterprise	1.36%	1.84%	0.96%	1.57%	2.95%	2.97%	1.03%	1.57%
	Department Budget	8,571	9,121	6,191	7,968	15,132	10,884	3,351	11,197
	Percent of Enterprise	0.65%	0.87%	0.35%	0.80%	1.48%	1.58%	0.42%	0.58%
Actual FY 2019-2020	Department FTE	55.47	57.40	51.00	40	87.00	83	26.00	N/A
	Percent of Enterprise	1.42%	1.84%	0.95%	1.30%	2.98%	2.97%	1.02%	N/A
	Department Budget	8,263	8,454	6,123	6,885	14,659	11,021	3,582	N/A
	Percent of Enterprise	0.71%	0.95%	0.36%	0.74%	1.42%	1.69%	0.53%	N/A

## Elections

Benchmark comparisons for the Elections Office were conducted with the eight comparison counties specified in our contract at the request of the CEO's Office. However, as noted, not all County budgets present information on budget and staffing at the individual program level. San Luis Obispo County did not provide a program-level breakdown for FY 2020–2021 and, therefore, budget level data for this county has been excluded from the benchmarking outlined below for FY 2020–2021.

	Budgets actual in \$'000	Santa Barbara	Average	Monterey	Solano	SLO	Marin	Sonoma	Tulare
Recommended FY 2022–2023	Department FTE	21.50	10.76	12.00	9.00	6.35	11.20	15.00	11.00
	Percent of Enterprise	0.48%	0.29%	0.21%	0.28%	0.22%	0.46%	0.36%	0.22%
	Department Budget	6,311	4,597	5,523	6,751	1,783	3,642	5,933	3,952
	Percent of Enterprise	0.45%	0.34%	0.30%	0.51%	0.23%	0.51%	0.28%	0.24%
Adopted FY 2021–2022	Department FTE	20.27	10.59	12.00	9.00	5.35	11.20	15.00	11.00
	Percent of Enterprise	0.47%	0.29%	0.22%	0.29%	0.19%	0.47%	0.36%	0.22%
	Department Budget	8,449	4,908	5,397	8,655	1,652	3,520	5,883	4,340
	Percent of Enterprise	0.62%	0.38%	0.32%	0.68%	0.22%	0.52%	0.28%	0.27%
Actual FY 2020–2021	Department FTE	16.79	11.40	12.00	9.00	N/A	10.00	15.00	11.00
	Percent of Enterprise	0.43%	0.30%	0.22%	0.29%	N/A	0.42%	0.37%	0.22%
	Department Budget	7,330	5,353	7,828	5,927	N/A	3,857	5,654	3,498
	Percent of Enterprise	0.56%	0.41%	0.44%	0.59%	N/A	0.48%	0.29%	0.24%
Actual FY 2019–2020	Department FTE	14.71	9.54	12.00	9.00	5.70	10.00	N/A	11.00
	Percent of Enterprise	0.38%	0.27%	0.22%	0.29%	0.20%	0.42%	N/A	0.22%
	Department Budget	4,662	4,192	5,203	7,233	1,276	4,167	N/A	3,082
	Percent of Enterprise	0.40%	0.42%	0.30%	0.78%	0.20%	0.51%	N/A	0.30%

## Clerk Recorder Fee Benchmarking

To evaluate service charges, KPMG benchmarked the County’s Clerk Recorder fees against the eight benchmark counties specified in our contract. Information was gathered from each county’s website and rates were aligned for comparison. Based on our analysis of the benchmarking data, the County offers rates on par with other counties for the majority of the services provided.

Fee type based on CSB	Santa Barbara	Solano	Monterey	Sonoma	Tulare	Placer	San Luis Obispo	Marin	Santa Cruz
Base Fee- Document Recording	\$14	\$13	\$13	\$91	\$21	\$14	\$14	\$14	\$14–\$17
Each Additional Page – Document Recording	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3
Building Homes and Jobs Act Fee Recording	\$75	\$75	\$75	\$75	-	\$75	\$75	\$75	-
Real Estate Fraud Prosecution Trust Fund Fee Document Recording	\$10	\$10	\$9	-	-	-	\$7	\$10	-
Combined Documents – Document Recording	Varies	\$13 plus \$3 for each additional page	-	\$14 per additional title, \$91 per additional title	\$21	\$14 per additional title, \$91 per additional title	\$14 plus \$3 for each additional page, plus \$14 for each additional document title to be indexed	-	-
Family 1–4 Rider (Assignment of Rents)	\$99	-	-	-	-	-	-	-	-
Trust Rider	\$89	-	-	-	-	-	-	-	-
Transfer Tax	\$0.55 per \$500	\$0.50 per \$500	\$0.55 per \$500	\$0.55–\$2 per \$500	\$0.55 per \$500	\$0.55 per \$500	\$0.55 per \$500	\$0.55 per \$500	\$0.55 per \$500
Nonconforming Fee	\$3	-	-	-	-	\$3	\$3	\$3	\$3
Indexing Fee (more than 10 names)	\$1	\$1	\$1	-	\$1	\$1	\$4	-	-
Indexing Fee (more than 1 recording reference)	\$1	\$1	-	\$1	\$1	\$1	-	-	-
Monument Survey	\$10	\$10	-	\$10	\$10	-	\$10	\$10	-
Preliminary Change of Ownership Report (Fee in Lieu of)	\$20	\$20	\$20	\$20	\$20	\$20	\$20	\$20	\$20
Penalty Print	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1	\$1



Fee type based on CSB	Santa Barbara	Solano	Monterey	Sonoma	Tulare	Placer	San Luis Obispo	Marin	Santa Cruz
Preliminary 20-Day Notice	\$42	\$58	-	\$35	\$58	\$54	\$43	\$50	\$37
Involuntary Lien (abstract of judgment) – 1st page, include lien notification	\$40	-	-	-	-	-	-	\$11	\$7
Involuntary Lien (abstract of judgment) – Each additional page	\$3	-	-	-	-	-	-	-	-
Involuntary Lien (abstract of judgment) – Each additional debtor	\$7	\$9	\$7	-	\$13	-	\$17	\$11	\$3
Release of Lien, Encumbrance, or Notice – Executed by the State or any municipality, county, city, district, or other political subdivision	\$20	\$20	\$20	\$20	\$20	\$20	\$20	\$20	\$20
Release of Lien, Encumbrance, or Notice – Recorded in ERROR by the State or any municipality, county, city, district, or other political subdivision	\$0	-	-	-	-	-	-	-	-
Federal Tax Lien or Release	\$14	-	\$22	-	-	\$14	-	\$24	-
Release of Judgment	\$20	-	-	-	\$13	-	-	-	-
UCC-1 and UCC-3 1–2 pages – Financing Statement Recording Fees	\$21	UCC 1 = \$10 plus \$75; UCC 3 = \$20 plus \$75	-	\$10 per additional title, \$87 per additional title	\$21	-	\$10	\$14	\$14
UCC-1 and UCC-3 3 or more pages – Financing Statement Recording Fees	\$31	UCC 1 = \$20 plus \$75; UCC 3 = \$30 plus \$75	-	\$10 per additional title, \$87 per additional title	\$31	-	\$20	\$24	\$24
Recording or Filing and Indexing Each Map – 1 page, subdivision and parcel maps	\$49	\$12	\$83	\$9	\$8	\$8	\$8	\$84	\$10
Recording or Filing and Indexing Each Map – 1 page, all other maps	\$35	-	-	-	-	-	-	\$84	-
Each Additional Map Page	\$7	\$4	\$2	\$2	\$2	\$3	\$2	\$2	\$2
Map Certification	\$9	-	-	-	-	-	-	\$4	-
Real Estate/Official Record Copies and Certification Fees – Official Record Copy	\$10	-	\$2 per page	\$5 per page	\$3 for first page of document plus \$1 for each additional page of same document	\$2	\$6 first page plus \$0.50 each additional page	\$4 first page plus \$2 each additional page	\$1





Fee type based on CSB	Santa Barbara	Solano	Monterey	Sonoma	Tulare	Placer	San Luis Obispo	Marin	Santa Cruz
Federal Tax Lien or Release	\$14	-	\$22	-	-	\$14	-	\$24	-
Release of Judgment	\$20	-	-	-	\$13	-	-	-	-
UCC-1 and UCC-3 1-2 pages – Financing Statement Recording Fees	\$21	UCC 1 = \$10 plus \$75; UCC 3 = \$20 plus \$75	-	\$10 per additional title, \$87 per additional title	\$21	-	\$10	\$14	\$14
UCC-1 and UCC-3 3 or more pages – Financing Statement Recording Fees	\$31	UCC 1 = \$20 plus \$75; UCC 3 = \$30 plus \$75	-	\$10 per additional title, \$87 per additional title	\$31	-	\$20	\$24	\$24
Recording or Filing and Indexing Each Map – 1 page, subdivision and parcel maps	\$49	\$12	\$83	\$9	\$8	\$8	\$8	\$84	\$10
Recording or Filing and Indexing Each Map – 1 page, all other maps	\$35	-	-	-	-	-	-	\$84	-
Each Additional Map Page	\$7	\$4	\$2	\$2	\$2	\$3	\$2	\$2	\$2
Map Certification	\$9	-	-	-	-	-	-	\$4	-
Real Estate/Official Record Copies and Certification Fees – Official Record Copy	\$10	-	\$2 per page	\$5 per page	\$3 for first page of document + \$1 for each additional page of same document.	\$2	\$6 first page plus \$0.50 each additional page	\$4 first page plus \$2 each additional page	\$1
Real Estate/Official Record Copies and Certification Fees – Official Record Certification	\$2	-	\$2	\$4	\$5 for first page of document plus \$1 for each additional page of same document	\$2	\$1	\$4	-
Real Estate/Official Record Copies and Certification Fees – Conformed Copy	\$2	-	-	-	\$1	-	\$0	-	\$1
Real Estate/Official Record Copies and Certification Fees – Certified Copy of DD214 for Military Personnel	\$0	-	-	-	-	\$0	-	-	-
Real Estate/Official Record Copies and Certification Fees – Digital Images of Official Records	\$33	-	-	-	-	-	-	-	-
Real Estate/Official Record Copies and Certification Fees – USPS First Class Mail	\$2	-	-	-	-	-	-	-	-



Fee type based on CSB	Santa Barbara	Solano	Monterey	Sonoma	Tulare	Placer	San Luis Obispo	Marin	Santa Cruz
Real Estate/Official Record Copies and Certification Fees – USPS Express Mail	\$24	-	-	-	-	-	-	-	-
Real Estate/Official Record Copies and Certification Fees – Express Mail handling fee if customer provides a prepaid Express Mail envelope	\$5	-	-	-	-	-	-	-	-
Birth Certificate Certified Copy – Public	\$32	\$34	\$29	\$32	\$32	\$32	\$32	\$29	\$32
Birth Certificate Certified Copy – Government	\$22	-	\$22	-	-	\$22	-	-	\$22
Birth Certificate Certified Copy – Children's Support Enforcement by District Attorney	\$0	-	-	-	-	-	-	-	-
Death Certificate Certified Copy – Public and Government	\$24	\$26	\$24	\$24	\$24	\$24	\$24	\$24	\$24
Fetal Death Certificate Certified Copy – Public	\$21	-	\$21	-	\$21	\$21	\$21	-	\$24
Marriage Certificate Certified Copy – Public	\$17	\$19	\$17	\$17	\$17	\$17	\$17	\$17	\$17
Marriage Certificate Certified Copy – Government	\$12	-	\$12	-	-	\$12	-	-	\$12
USPS First Class Mail	\$2	-	-	-	-	-	-	-	-
USPS Express Mail	\$24	-	-	-	-	-	-	-	-
Express Mail handling fee If customer provides a prepaid express mail envelope	\$5	-	-	-	-	-	-	-	-
Public Marriage License	\$100	\$90	\$90	\$82	\$93	\$57	\$100	\$85	-
Confidential Marriage License	\$111	\$100	\$95	\$92	\$95	\$60	\$100	\$93	-
Marriage Declaration	\$110	-	\$90	\$82	-	-	-	\$85	-
Marriage Declaration – Other County	\$121	-	-	-	-	-	-	-	-
Non-Clergy Marriage License	\$105	\$90	\$90	-	-	-	-	\$85	-
Expedite Recording	\$12	-	-	-	-	-	-	-	-



Fee type based on CSB	Santa Barbara	Solano	Monterey	Sonoma	Tulare	Placer	San Luis Obispo	Marin	Santa Cruz
Duplicate Marriage License	\$56	\$32	\$35	\$56	\$62	\$28	\$38	\$56	-
Amendment to Public Marriage: Within 1 year of ceremony	\$0	-	-	-	-	-	-	-	-
Amendment to Public Marriage: 1 year or more after ceremony, filed with the State, \$20 filing fee paid to the State	\$0	-	-	-	-	-	-	-	-
Amendment to Confidential Marriage	\$35	-	\$26	\$26	-	-	-	-	-
Marriage Ceremony Reservation	\$23	-	-	-	-	-	-	-	-
Civil Marriage Ceremony – At Clerk-Recorder's Office (GC 26861)	\$104	\$50	-	\$60	-	\$40	\$55	\$56	-
Civil Marriage Ceremony – Sunken Gardens or Mural Room (GC 26861)	\$116	-	-	-	-	-	-	-	-
Marriage Ceremony Witness Fee	\$51	\$27	-	\$22	-	-	\$28	-	-
Notary Public Application/Renewal	\$300	-	\$300	-	-	\$300	-	-	-
Deputy Commissioner of Civil Marriages	\$51	-	\$85	\$133	-	\$40	\$55	\$60	-
FBNS – New or Renewal Filing	\$47	\$50	\$40	\$55	\$45	\$30	\$62	\$42	-
FBNS – Additional Business Name	\$5	\$7	\$7	\$9	\$7	\$6	\$8	\$7	-
FBNS – Additional Registrant	\$5	-	-	-	-	-	\$8	\$7	-
FBNS – Abandonment/Withdrawal Filing	\$30	\$40	\$35	\$31	\$30	\$30	\$62	\$28	-
FBNS – Regular Fictitious Business Names Copy	\$5	-	-	\$1	-	-	-	-	-
FBNS – Certified Fictitious Business Names Copy	\$7	\$11	\$2	\$2	-	\$2	\$2	\$3	-
FBNS – Fictitious Business Names List – CD	\$51	-	-	-	-	-	Varies	-	-
FBNS – Fictitious Business Names List – Hard Copy	\$12	-	-	-	\$60 (for one-year printout)	-	-	-	-
FBNS – USPS First Class Mail	\$2	-	-	-	-	-	-	-	-



Fee type based on CSB	Santa Barbara	Solano	Monterey	Sonoma	Tulare	Placer	San Luis Obispo	Marin	Santa Cruz
FBNS – USPS Express Mail	\$24	-	-	-	-	-	-	-	-
FBNS – Express Mail handling fee if customer provides a prepaid Express Mail envelope	\$5	-	-	-	-	-	-	-	-
Clerk File Copy	\$12	-	-	\$1 per page	\$3	\$2	-	\$2 first page plus \$0.15 each additional page	-
Clerk Certification	\$2	\$11	-	\$2	\$2	\$2	\$4	-	-
Clerk Translation Verification	\$23	\$24	\$10	\$10	-	\$10	-	-	-
Clerk Filing Confirmation Certificate	\$14	-	-	-	\$10–\$13	-	-	-	-
Public Official Certificate – Notary Public Verification	\$14	\$15	\$15	\$15	\$13	\$10	\$17	\$13	-
Miscellaneous Clerk Filing and Indexing	\$16	-	\$10	-	\$13 (plus \$1 per minute after 15 minutes)	-	-	-	-



## Interview Schedule

This section provides detail on the meetings held with the County Clerk-Recorder, Assessor, and Elections Department during the review. Throughout the review period, the KPMG team held over 40 interviews and focus groups with Department staff and providers to understand the organizational structure, roles and responsibilities, operations, and processes of the Department.

Meeting Name	KPMG Attendees	Client Attendees	Date
Santa Barbara Clerk-Recorder, Assessor, and Elections Department – KPMG Review Kick-off	Bill Zizic, Alex Rothman, Banjo Anderson, Olivia Rabbitte, Kareem Ismail	Joe Holland, Steven Yee, Nancy Anderson, Melinda Greene, Michael Daly, Rick Holly, Susan Morrison, Dylan Tekautz	4/24/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Melinda Greene (Clerk-Recorder)	Kareem Ismail, Banjo Anderson	Melinda Greene	4/5/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Christine Potter	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Christine Potter	5/1/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Rick Holly (Assessor)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Rick Holly	5/2/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Michael Daly (Elections)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Michael Daly	5/2/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Anthony Luis (Assessor)	Kareem Ismail, Olivia Rabbitte	Anthony Luis	5/2/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Joe Holland (County Clerk-Recorder, Assessor, and Registrar of Voters)	Kareem Ismail, Olivia Rabbitte, Alexander Rothman	Joe Holland	5/3/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Connie Tran	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Connie Tran	5/5/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Matt Niblett (Elections)	Kareem Ismail, Olivia Rabbitte	Matt Niblett	5/8/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Sheila Hess (Elections Supervisor)	Kareem Ismail, Olivia Rabbitte	Sheila Hess	5/8/2023

Meeting Name	KPMG Attendees	Client Attendees	Date
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Jan Morale (Clerk Supervisor)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Jan Morale	5/9/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Susan Kean (HR Manager)	Kareem Ismail	Susan Kean	5/9/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Hector Gonzalez-Loera (Elections Supervisor)	Kareem Ismail, Olivia Rabbitte	Hector Gonzalez-Loera	5/10/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Brenda Aguilera (Recorder Supervisor)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Brenda Aguilera	5/11/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Rachel Hoffman (Clerk Supervisor)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Rachel Hoffman	5/11/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Andrea Luparello (Elections Supervisor)	Kareem Ismail	Andrea Luparello	5/11/2023
Santa Maria Clerk-Recorder Focus Group	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Jocelynn Lopez-Marquita, Mary Soto	5/17/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Sergio Ricardo (Assessor Supervisor)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Sergio Ricardo	5/17/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Corey Toth (Assessment Supervisor)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Corey Toth	5/17/2023
Santa Barbara Clerk-Recorder Focus Group	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Adrienne Koroshec, Abbie Cown	5/17/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Raquel Medina (Assessor Supervisor)	Kareem Ismail	Raquel Medina	5/17/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Derek Wiggam (Assessor Supervisor)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Derek Wiggam	5/17/2023

Meeting Name	KPMG Attendees	Client Attendees	Date
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Eva Chavez and Michelle Bazaei (Elections Division)	Kareem Ismail, Banjo Anderson	Eva Chavez, Michelle Bazaei	5/18/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with John Beck and Destiny Harrell (Elections Division)	Kareem Ismail, Banjo Anderson	John Beck, Destiny Harrell	5/18/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Kasey Kump (Assessor Supervisor)	Kareem Ismail, Banjo Anderson	Kasey Kump	5/18/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Tyler Hemphill, Sam Patton, Linda Smither, and Jeffrey Cottrell (Assessor Division)	Kareem Ismail, Banjo Anderson	Tyler Hemphill, Sam Patton, Linda Smither, Jeffrey Cottrell	5/18/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Gabe Cabello, Chris Ise, and Hannah Nelson (Assessor Division)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Gabe Cabello, Chris Ise, Hannah Nelson	5/18/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Cassidy Schneibel (Assessor Division)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Cassidy Schneibel	5/18/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Follow-up Meeting with Susan Kean (HR Manager)	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Susan Kean	5/31/2023
Follow-up Meeting with Michael Daly (Division Chief, Elections)	Kareem Ismail, Olivia Rabbitte	Michael Daly	6/2/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Meeting with Heather McCaslin (Elections Division)	Kareem Ismail, Olivia Rabbitte	Heather McCaslin	6/6/2023
KPMG Review of County Clerk-Recorder, Assessor, and Elections – Follow-up Meeting with Melinda Greene (Clerk-Recorder)	Kareem Ismail, Olivia Rabbitte	Melinda Greene	6/13/2023
KPMG Follow-up With Andrea Luparello	Kareem Ismail	Andrea Luparello	7/11/2023

Meeting Name	KPMG Attendees	Client Attendees	Date
Follow-up Meeting with Michelle Bazaei	Kareem Ismail	Michelle Bazaei	7/11/2023
KPMG Follow-up with Kasey Kump	Kareem Ismail	Kasey Kump	7/12/2023
KPMG Follow-up Meeting with Rick Holly	Kareem Ismail, Olivia Rabbitte	Rick Holly	7/25/2023
KPMG Meeting to Discuss Department Budgeting	Kareem Ismail, Olivia Rabbitte	Vanessa Graeff, Melinda Greene	8/9/2023
KPMG Meeting with Steven Yee	Kareem Ismail, Olivia Rabbitte	Steven Yee	8/15/2023
KPMG Meeting re: Department Themes	Alex Rothman, Banjo Anderson, Kareem Ismail	Jeff Frapwell, Nancy Anderson	8/21/2023
KPMG Review – Clerk-Recorder Assessor Elections Themes Meeting	Kareem Ismail, Olivia Rabbitte, Banjo Anderson	Jeff Frapwell, Nancy Anderson, Melinda Greene, Joe Holland, Rick Holly, Michael Daly, Susan Morrison	8/24/2023
KPMG Meeting on Elections Billing and Reimbursement	Kareem Ismail, Banjo Anderson	Melinda Greene, Michael Daly, Vanessa Graeff, Dylan Tekautz, M. Cobos	8/29/2023

Figure 11: Source: KPMG



## Data Inventory

The below chart outlines the data received from the Department to complete the Departmental Review.

Data Item	Description
Department Organizational Chart – Broken Down by Division	PDF of the Department organizational chart by division with division leaders listed
Department Time Allocation Breakdown	Excel file of Department time allocation breakdown—broken down by individual staff member, including time coded to sickness, holiday, vacation, overtime, and regular hours
Previous Studies or Reviews	PDFs on previous studies and reviews on the Department's performance and operations
Finances	Excel files on previous FIN status by division, funding structures by division, balance sheets, and positions by demand
Clerk-Recorder Data Management	PDF and Word documents on current policies, procedures, and trainings across the Clerk-Recorder Division
Clerk-Recorder Workload Management	Excel files on workload management and performance data from 2015 to 2021
Clerk-Recorder IT Breakdown	Excel file breakdown of software inventory in 2022
Clerk-Recorder Rate Benchmarking	Excel files showing the breakdown of Clerk-Recorder fee structure
Assessor Property Tax Overview	Word document providing an overview of property tax policies in the Assessor Office
Assessor Workload Data	Excel files displaying the division production data from 2020 through 2022
Election Technologies	PDF files providing a breakdown of the technologies used during every election cycle
Election Staffing	Excel file providing a breakdown of staffing during election cycles
Vacancy Data	Excel files displaying Department vacancy data from 2018 through 2022
Contracts and Agreements	PDFs of the contracts that the Department is currently engaged in
Recruitment and Attrition	Excel file displaying recruitment and attrition data department-wide

Figure 82: Source: KPMG

## Operating Model Maturity Scale

The figure below describes a continuum of maturity related to optimal service delivery across the Department’s three offices. The purple boxes indicate each individual office’s capabilities at the time of the review, and the gold boxes illustrate the level of maturity that KPMG believes is attainable through the recommendations in this report.

<b>Clerk-Recorder</b>	Lack of a secure, online digital records system to reduce customer turnaround times and service accessibility	1	2	3	Despite ongoing research and investigation, there is limited available technological capability to store and electronically transfer digital records. This results in manual processes that can create an ineffective use of staff time and reduced customer satisfaction.	An online system capable of securely storing and transferring vital records, eliminating the need for the use of a notary for customers that cannot be authenticated by clerks in-person	Secure online digital records system that is user friendly, accessible, and scalable to meet the needs of the Elections Office
<b>Assessor</b>	Lack of formalized performance metrics and supporting targets	1	2	Currently, the Assessor Office lacks baseline key performance metrics and supporting targets resulting in reduced visibility into how staff are spending their time and risk of performance variance.	Formal qualitative and quantitative performance metrics and supporting targets that are communicated to staff and regularly evaluated by management and supervisory staff with opportunities for process improvement proactively identified	5	Formalized performance metrics and supporting targets, increased productivity, and enhanced data-sharing mechanisms
<b>Elections</b>	Inefficient inventory management processes, minimal storage capacity, and challenging recruitment processes	1	Inefficient inventory management technology, key challenges in obtaining sufficient space to store elections equipment, and difficulties attracting candidates with highly transferable skills	3	Optimal logistic management processes, increased storage space, and capability to attract key candidates with highly transferable skills through engagement with colleges and universities	5	Improved inventory management, increased storage capacity, and enhanced labor pool

Figure 13: Source: KPMG

## Operating Model Framework

This section describes the operating model framework that was developed to articulate how a function should be designed, structured, and operated to improve operational efficiency, effectiveness, and service delivery. It consists of six interacting layers that need to be considered in conjunction with each other to determine how to optimally deliver services to the public.

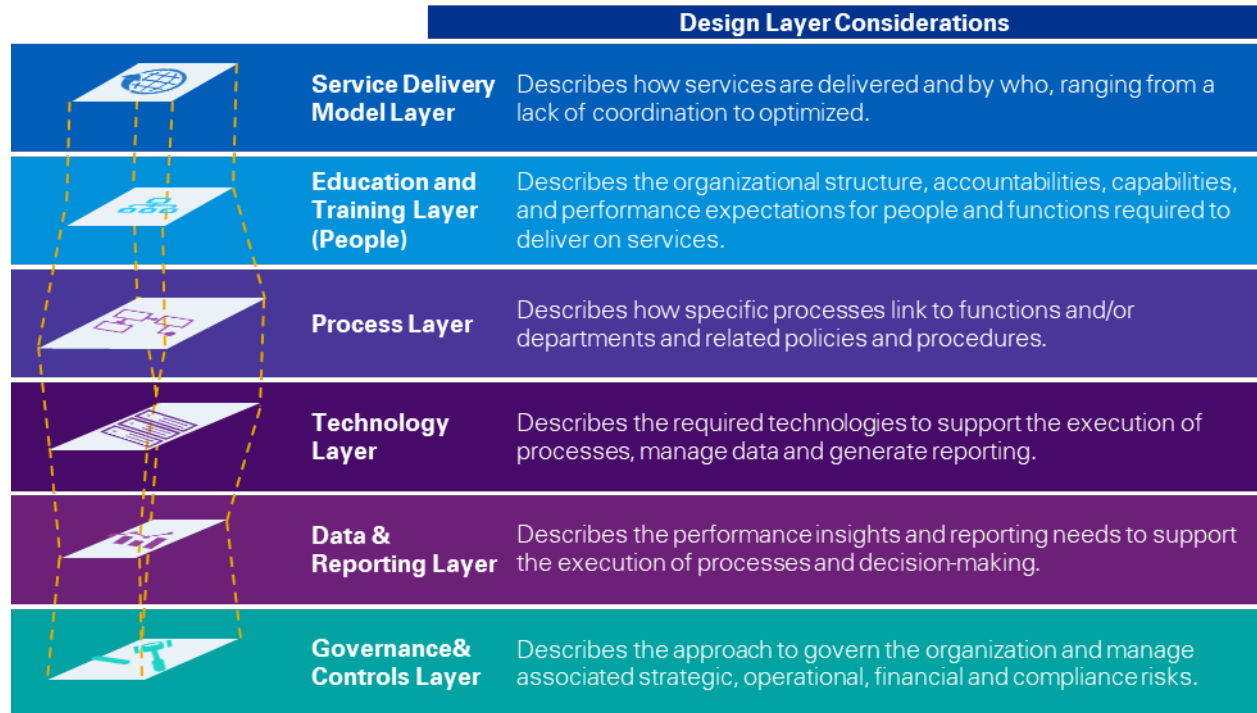


Figure 14: Source: KPMG

## Prioritized Timeline

The following report consists of eight recommendations across the three offices within the Clerk-Recorder, Assessor, Elections Department. Proposed timing and prioritization for each recommendation is depicted below.

			High-level Timeline											
			Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Clerk-Recorder	1.1	Continue to pursue opportunities for transition toward digital vital record copies to reduce reliance on paper confirmation, reduce risk, and reduce time needed to confirm records.												
Assessor	2.1	Enhance staff productivity tracking processes to improve consistency in evaluating staff performance and support proactive identification of process inefficiencies.												
	2.2	Expand the utilization of dashboarding to enhance data-sharing mechanisms and reduce data fragmentation both internally and cross-departmentally.												
	2.3	Enhance processes to communicate promotional requirements to staff to increase awareness and application.												
Elections	3.1	Consider implementing a new logistics management system to improve processes and ease workload across the Elections Office.												
	3.2	Consider alternate approaches for elections equipment transportation to support the timely distribution of elections equipment.												
	3.3	Collaborate with the CEO's Office and other complementary County departments to consider alternate storage options for elections equipment.												
	3.4	Consider restructuring the weighted reimbursement factors to align with the Department's needs.												
	3.5	Perform a fee study to identify an optimal billing methodology, reimbursement rate(s), and supporting weight factors that align to election cycle cost.												

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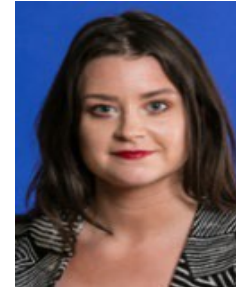
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