

**City Clerk**



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## Description

The City Clerk has a multifaceted role within the scope of City Government. The 1931 Charter and other governing authorities outlined the duties of the City Clerk as follows: to provide support to the legislative body, to administer municipal elections, to serve as the Filing Officer, to preserve archival records, to oversee the City's records management policies, and more recently to manage passport services. While the core functions of the Office remain unchanged, the way in which these critical services are delivered is ever evolving to provide greater access for all San Diegans.

The City Clerk is committed to achieving greater efficiency and constantly seeks improvement. This commitment has led to integrating innovative practices into daily operations serving our internal and external customers. The Legislative Services Division produces the Council agenda and records and maintains the official minutes of the City Council meetings. Each year, Legislative Services staff process the Council's decisions, including new laws, deeds, contracts, leases, and permits. It also processes notices of land use changes such as rezoning, annexations, and street work. To ensure timely public access to the Council meetings and agendas, the Legislative Services division manages an interactive and user-friendly Legislative Calendar and digitally posts agendas on a kiosk located at the entrance of the City Administration Building and on the City Clerk's website. The City Clerk continues to successfully facilitate hybrid City Council meetings, offering elected officials, City staff, and members of the public a safe, accessible, and efficient means of conducting and commenting on City business in real-time.

The Elections Division supports the City Clerk as the City's Elections Official in coordinating and accomplishing the municipal elections with integrity. The division's responsibilities include assisting candidates and public members in understanding procedures and requirements for running for office, submitting initiative or referendum petitions, and any potential recall efforts. The City Clerk is committed to ensuring the office has the resources and staff to meet all legal requirements to maintain accessibility and transparency to the public. During the recent election cycle, the City Clerk prepared new video training modules to assist candidates in navigating the nomination process. By preparing video modules, potential candidates could easily refer to relevant training materials and information at any time during the nomination process. This training was made available online for

the first time, giving the public an educational opportunity to understand the process better and engage in our election process.

As the City's Filing Official, the Office assists designated filers with filing campaign statements, Statements of Economic Interest, and lobbyist registration and disclosure forms. The City Clerk continues to utilize and improve upon a modern, user-friendly electronic filing system for disclosure documents, creating cost efficiencies and maximum transparency for public disclosure. Additionally, in partnership with the Office of Boards and Commissions, the City Clerk continues to utilize an online repository and application system to maintain the rosters for the City's Boards and Commissions, allowing the public and the Council to access information in real-time and in a searchable format to maximize opportunities for public participation.

For over 100 years, the City Clerk has had legal mandates related to Records Management per the 1889 and 1931 Charter. The Records Management Policy creates a framework for the lifecycle of all City records. Elements of records management include updating the Master Records Schedule, protecting vital City records which are safely maintained in off-site storage in case of a local emergency or natural disaster, storing inactive records, digitizing records, and training and advising City departments about records management. The City Clerk continues to advance its utilization of Electronic Trusted Systems to store City records. Additionally, the Research section responds to thousands of requests yearly. It disseminates information regarding legislative actions and policy decisions to other agencies, City staff, and the public.

The Office of the City Clerk's award-winning Archives Access and Preservation Program has allowed for the preservation and digitization of some of the City's most valuable and fragile historical materials, including over 1,000,000 items scanned and uploaded to the Digital Archives. The program, recognized by local historic preservation organizations and the California Records Advisory Board, is known for its Archival excellence in long-term preservation. Many of the City's rare documents, maps, and historical images are accessible to the general public. Collections include City Council audio tapes, burial records, silent movies, and the Digital Archives' most sought-after collection of San Diego's neighborhoods from the 1970s, the "Street Views."

Lastly, the Information and Passport Services section is the initial contact for most callers and visitors to the Office of the City Clerk and the City. Located in the City Administration Building Lobby, the Information staff responds to thousands of requests yearly. It disseminates information regarding city business and contacts to other agencies, City staff, and the public. The Passport Acceptance Facility also continues to be an enormous success. Since its establishment in 2013, the agency has processed over 39,000 passport applications and generated over \$1.5 million to the General Fund. The passports section continues to grow and successfully implemented a new scheduling system to maximize daily appointments while still providing walk-in services.

The City Clerk is committed to acting as a gateway to local government, as evidenced by strengthening core services and developing new programs to foster equity, trust, access, and transparency.

***The vision is:***

To connect all San Diegans and their City Government through greater transparency and equitable access.

***The mission is:***

To provide accurate information and maximize access to municipal government.

## Goals and Objectives

**Goal 1: *Customer Service: Provide customers with accurate and thorough information and access to City information and records, City Council meetings, election resources, historical resources, and passport services in a courteous, timely, accessible, and user-friendly manner.***

- Ensure that our services are informative and efficient and cater to our customers' diverse needs, fostering an inclusive and welcoming environment for all.

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

- Maintain an accurate inventory of physical records stored with the Office of the City Clerk in the Records Center.

**Goal 3: *Legal Requirements: Adhere to State and local mandates and deadlines.***

- Provide guidance and training to City departments to comply with Statement of Economic Interest requirements.

**Goal 4: *Community Engagement: Enhance services through civic engagement programming.***

- Cultivate meaningful partnerships with schools, colleges, citizens, and diverse organizations to proactively amplify programming and foster inclusive engagement within the community.

# Budget Equity Impact Statement

<p><b>Equity Highlights</b></p> <p><i>Examples from the current fiscal year.</i></p> <ul style="list-style-type: none"> <li>• Enhanced the Language Access Program by incorporating guidance on engaging in Council Meetings in eight distinct languages: Arabic, Chinese, Spanish, Filipino, Japanese, Korean, Laotian, and Vietnamese. These languages align with the requirements outlined in the Voting Rights Act and in conformance with recent census data. This eliminates the necessity for community members to request assistance before a hearing. This ensures that community members who speak different languages can participate on par with English speakers in real-time, and that language is not a barrier to engaging during Council Meetings.</li> <li>• Curated the City Clerk’s 5th Annual Archives Exhibit titled, “Dennis V. Allen and other San Diego Firsts.” The exhibit ran June 20, 2023, through July 7, 2023, in the lobby of the City Administration Building. The exhibit was a salute and celebration of trailblazers whose hard work achieved social and political milestones for equality in the City of San Diego as they broke significant barriers.</li> <li>• Re-evaluated the Passport Acceptance Facility’s appointment and walk-in schedule to provide greater access and availability to all San Diego residents. The Passport Acceptance Facility increased the number of available appointments, as well as ensured consistent walk-in hours. The new passport schedule broadens access to passport processing, which is especially beneficial for customers who may not have the flexibility to schedule appointments far in advance due to work or family commitments. Additionally, the Office of the City Clerk provided assistance to the January 22nd flood victims whose passports were lost or damaged. This action ensured that individuals affected the January natural disaster could receive the support needed to replace their passports. Additionally, the Office of the City Clerk received City Council approval for the proposed fee waiver for passport photos reducing the financial barriers to flood victims who desire to receive this City service.</li> </ul>
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<p><b>Budget Equity Lens Summary</b></p> <p><b>Ongoing Operations</b></p> <p><i>Is there an opportunity to adjust the department's ongoing operations to address a disparity?</i></p> <p><b>Yes</b></p> <p>1. Collaborate with the Department of Information Technology to expand the Language Access Program by using AI technology to provide the Council Meeting Summary Agenda in eight distinct languages. This is an additional step in providing community members who speak different languages with information regarding Council Meetings and ensuring that they can participate in real-time on par with English speakers. 2. Collaborate with the Department of Race &amp; Equity to focus on inclusivity in Archives by expanding archival displays and collections to include and highlight historical insight into San Diego’s diverse communities and the City’s past laws, regulations, and practices. 3. Collaborate with the Library Department to bring rotating passport appointments and service pop-ups to different library branches across City districts. This will increase access to City services and close geographic disparities, bringing greater equity to customers’ ability to access passport</p>
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appointments. 4. Review, evaluate, and revise internal policies and procedures to address disparities and barriers to City Clerk services.

## **Budget Adjustment(s)**

*Do the Budget Adjustments address a disparity?*

### **Yes**

The budget adjustments address disparities that align with the Office of the City Clerk's Tactical Equity Plan goals: 1. Customer Service: Provide customers with accurate and thorough information and access to City information and records, City Council meetings, elections resources, historical resources, and passport services in a courteous, timely, accessible, and user-friendly manner. 2. Functionality: Embrace cutting-edge technology and industry best practices to enhance efficiency, transparency, and accessibility 3. Legal Requirements: Adhere to State and local mandates and deadlines. 4. Community Engagement: Enhance services through civic engagement programming. Budget Adjustment #1: Addition of 1.00 Deputy Director to provide technical and procedural support to the City's legislative body. Equity Lens Response #1: The addition of 1.00 Deputy Director of Legislative Services enhances transparency and access to the City's legislative proceedings for all San Diego residents. This public-facing position actively addresses disparities, particularly involving participation to the City's legislative process, facilitating equitable engagement and representation across all communities by understanding the public's perspectives and needs. Additionally, this position provides support to City staff and the City Council to ensure legal compliance and consistency in legislative proceedings. Budget Adjustment #2: Adjustment to reflect revised Passport Services Fees' revenue projections. Equity Lens Response #2: The revenue increase of \$50,000 for the General Fund was a result of the department re-evaluating the Passport Acceptance Facility's appointment and walk-in schedule to provide greater access and availability to all San Diego residents. The Passport Acceptance Facility increased the number of available appointments, as well as ensured consistent walk-in hours. The new passport schedule broadens access to passport processing, which is especially beneficial for customers who may not have the flexibility to schedule appointments far in advance due to work or family commitments. Budget Adjustment #3: The addition of 0.12 Legislative Recorder 2-NP and 0.11 Clerical Assistant 2-NP allow the City Clerk to fulfill a variety of mandated functions. This request maintains Fiscal Year 2024 service levels. Equity Lens Response #3: Fulfillment of mandated deadlines and legal requirements for legislative proceedings resulting in access and transparency for all San Diego residents. Budget Adjustment #4: Vacancy Savings of 1.00 Associate Management Analyst, 1.00 Deputy City Clerk 1, and 0.33 Administrative Aide 2. Equity Lens Response #4: Department planned to create better community engagement with a focus on diversity and inclusion, and a part of the implementation will be delayed by maintaining the vacancy of the Associate Management Analyst position whose focus would be community engagement and special projects. Additionally, maintaining the vacancy of 1.00 Deputy City Clerk 1 position may slow customer service response time to Public Records Act and records management requests which minimizes access to for internal and external customers. Lastly, the 0.33 vacancy of the Administrative Aide 2 in the Archives section will result in a reduction in the number of hours spent conducting research for the exhibits and indexing the archival artifacts highlighting the diverse history of our City.

## Key Performance Indicators

Performance Indicator	Definition	Baseline	FY2024 Performance	Goal
Customer Service (Provide customers with accurate and thorough responses in a courteous, timely and user-friendly manner) <sup>2</sup>	Percentage of customer service provided with accurate and thorough responses in a courteous, timely, and user-friendly manner	97%	98%	N/A
Functionality (Embrace cutting-edge technology and industry best practices to enhance efficiency, transparency and accessibility) <sup>2</sup>	Percentage of cutting-edge technology and industry best practices that enhanced efficiency, transparency, and accessibility	99%	99%	N/A
Legal Requirements (Adhere to state and local mandates and deadlines related to city government) <sup>2</sup>	Percentage of legal requirements adhered to including State and local mandates and deadlines relating to city government	99%	100%	N/A
Serving Our City (Facilitate and coordinate specific City legislative-, election- and records-related actions and proceedings professionally and cooperatively) <sup>1,2</sup>	Percentage of specific City legislative-, election- and records-related actions and proceedings professionally facilitated and coordinated	100%	82%	N/A
Provide guidance and training to City departments to comply with Statement of Economic Interest requirements <sup>3</sup>	Percentage of Statement of Economic Interest (SEI) filers submitting AO/LO/Annual by the 30-day required deadline	80%	N/A	90%
Percentage of favorable customer satisfaction survey scores <sup>3</sup>	To best serve San Diegans, the Office of the City Clerk is open to feedback and suggestions for continuous improvement within the department. The team will implement an annual customer satisfaction survey to internal and external customers with a goal of 85% favorable response rates	N/A	N/A	85%
Average response time to customer inquiries <sup>3</sup>	The average time to respond to customer inquiries received through various channels, such as phone calls, emails, or online forms, shall be within 4 hours 90% of the time. A shorter average response time indicates that the office is meeting its goal of providing timely and accessible information to customers	85%	N/A	90%



## Key Performance Indicators

Performance Indicator	Definition	Baseline	FY2024 Performance	Goal
Review of boxes and files with an overdue status <sup>3</sup>	Using and ensuring accuracy in a new records management software system, we will complete a 100% review of all boxes and files with an overdue status to ensure accurate tracking of City records	100%	N/A	100%
Perform quarterly risk-based audit of City records <sup>3</sup>	Complete quarterly risk-based audits of representative samples to ensure accurate tracking of City records and inform priorities for digitization	N/A	N/A	4
Enhance community engagement and programming <sup>3</sup>	20% increase in community engagement activities established with nonprofit organizations, governmental and non-governmental institutions, citizens and/or other regional archives and museums to enhance our community engagement and programming with a focus on highlighting all members of our community and their stories	22%	N/A	20%
Inclusivity in the Archives <sup>3</sup>	Ensuring that 40% of our programming promotes diversity, equity, and inclusion, recognizing their profound impact on the enrichment and vibrancy of our City	22%	N/A	40%

<sup>1</sup> Due to increased participation in the City's Employ & Empower Program, the number of volunteer hours was reduced from 2,500 hours to 1,168 hours to accommodate the 5-6 Employ & Empower interns annually. In fiscal year 2024, Employ & Empower interns contributed an estimated 2,400 hours towards various projects implemented by the department.

<sup>2</sup> Previous fiscal year's KPIs will be phased out to better align with updated departmental goals and objectives.

<sup>3</sup> New KPI for Fiscal Year 2025.

## Department Summary

	FY2023 Actual	FY2024 Budget	FY2025 Adopted	FY2024-2025 Change
FTE Positions (Budgeted)	50.32	50.32	52.73	2.41
Personnel Expenditures	\$ 5,237,872	\$ 6,012,919	\$ 6,678,901	\$ 665,982
Non-Personnel Expenditures	1,386,744	1,376,347	1,363,419	(12,928)
<b>Total Department Expenditures</b>	<b>\$ 6,624,616</b>	<b>\$ 7,389,266</b>	<b>\$ 8,042,320</b>	<b>\$ 653,054</b>
<b>Total Department Revenue</b>	<b>\$ 255,009</b>	<b>\$ 258,934</b>	<b>\$ 368,501</b>	<b>\$ 109,567</b>

## General Fund

### Department Expenditures

	FY2023 Actual	FY2024 Budget	FY2025 Adopted	FY2024-2025 Change
City Clerk	\$ 3,007,513	\$ 3,212,647	\$ 3,171,749	\$ (40,898)
Elections & Information Services	686,800	771,827	814,604	42,777
Legislative Services	1,729,181	2,017,084	2,298,649	281,565
Records Management	1,201,121	1,387,708	1,757,318	369,610
<b>Total</b>	<b>\$ 6,624,616</b>	<b>\$ 7,389,266</b>	<b>\$ 8,042,320</b>	<b>\$ 653,054</b>

### Department Personnel

	FY2023 Budget	FY2024 Budget	FY2025 Adopted	FY2024-2025 Change
City Clerk	9.50	11.50	14.00	2.50
Elections & Information Services	8.50	7.50	6.50	(1.00)
Legislative Services	18.32	17.32	18.23	0.91
Records Management	14.00	14.00	14.00	0.00
<b>Total</b>	<b>50.32</b>	<b>50.32</b>	<b>52.73</b>	<b>2.41</b>

### Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>Salary and Benefit Adjustments</b> Adjustments to reflect savings resulting from vacant positions for any period of the fiscal year, retirement contributions, retiree health contributions, and labor negotiations.	0.00	\$ 510,604	\$ -
<b>Legislative Services Support</b> Addition of 1.00 Deputy Director to support the City's legislative proceedings.	1.00	251,742	-
<b>Non-Discretionary Adjustment</b> Adjustment to expenditure allocations that are determined outside of the department's direct control. These allocations are generally based on prior year expenditure trends and examples of these include utilities, insurance, and rent.	0.00	67,727	-

## Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>Employ and Empower Program</b> Addition of 1.50 Management and Student Interns and associated revenue to support the Employ and Empower Program.	1.50	59,566	59,567
<b>Non-Standard Hour Personnel Funding</b> Funding allocated according to a zero-based annual review of hourly funding requirements.	(0.09)	(4,146)	-
<b>One-Time Additions and Annualizations</b> Adjustment to reflect one-time revenues and expenditures, and the annualization of revenues and expenditures, implemented in Fiscal Year 2024.	0.00	(38,050)	-
<b>Support for Information Technology</b> Adjustment to expenditure allocations according to an annual review of information technology funding requirements.	0.00	(42,605)	-
<b>Operational Efficiency</b> One-time reduction of personnel expenditures due to an anticipated delay in hiring for any vacancies that may occur in Fiscal Year 2025.	0.00	(151,784)	-
<b>Revised Passport Services Fee Revenue</b> Adjustment to reflect revised revenue projections for Passport Services Fees.	0.00	-	50,000
<b>Total</b>	<b>2.41 \$</b>	<b>653,054 \$</b>	<b>109,567</b>

## Expenditures by Category

	FY2023 Actual	FY2024 Budget	FY2025 Adopted	FY2024-2025 Change
<b>PERSONNEL</b>				
Personnel Cost	\$ 2,953,384	\$ 3,614,514	\$ 4,185,446	570,932
Fringe Benefits	2,284,488	2,398,405	2,493,455	95,050
<b>PERSONNEL SUBTOTAL</b>	<b>5,237,872</b>	<b>6,012,919</b>	<b>6,678,901</b>	<b>665,982</b>
<b>NON-PERSONNEL</b>				
Supplies	\$ 116,171	\$ 126,328	\$ 127,128	800
Contracts & Services	444,464	285,061	315,178	30,117
<i>External Contracts &amp; Services</i>	219,012	61,764	61,764	-
<i>Internal Contracts &amp; Services</i>	225,452	223,297	253,414	30,117
Information Technology	513,015	692,712	612,057	(80,655)
Energy and Utilities	309,457	267,485	304,295	36,810
Other	3,636	4,761	4,761	-
<b>NON-PERSONNEL SUBTOTAL</b>	<b>1,386,744</b>	<b>1,376,347</b>	<b>1,363,419</b>	<b>(12,928)</b>
<b>Total</b>	<b>\$ 6,624,616</b>	<b>\$ 7,389,266</b>	<b>\$ 8,042,320</b>	<b>\$ 653,054</b>

## Revenues by Category

	FY2023 Actual	FY2024 Budget	FY2025 Adopted	FY2024-2025 Change
Charges for Services	\$ 240,541	\$ 242,354	\$ 351,921	109,567
Fines Forfeitures and Penalties	-	1,000	1,000	-
Licenses and Permits	13,971	15,580	15,580	-
Other Revenue	497	-	-	-
<b>Total</b>	<b>\$ 255,009</b>	<b>\$ 258,934</b>	<b>\$ 368,501</b>	<b>\$ 109,567</b>

# City Clerk

## Personnel Expenditures

Job Number	Job Title / Wages	FY2023 Budget	FY2024 Budget	FY2025 Adopted	Salary Range	Total
<b>FTE, Salaries, and Wages</b>						
20000024	Administrative Aide 2	5.00	5.00	6.00	\$ 63,360 - 76,360	\$ 426,572
20001078	Assistant City Clerk	0.00	1.00	1.00	72,886 - 268,057	220,584
20000119	Associate Management Analyst	7.00	7.00	7.00	80,424 - 97,203	598,410
20001106	City Clerk	1.00	1.00	1.00	53,856 - 321,585	255,354
90000539	Clerical Assistant 2 - Hourly	0.15	0.15	0.11	44,505 - 53,638	4,896
20000370	Deputy City Clerk 1	15.00	15.00	15.00	48,940 - 59,100	816,584
20000371	Deputy City Clerk 2	5.00	5.00	4.00	56,172 - 67,948	263,571
20001168	Deputy Director	3.00	2.00	3.00	72,886 - 268,057	600,257
20000293	Information Systems Analyst 3	1.00	1.00	1.00	90,015 - 108,805	107,516
20000347	Legislative Recorder 2	4.00	4.00	4.00	64,693 - 78,326	298,104
90000347	Legislative Recorder 2 - Hourly	0.17	0.17	0.12	64,693 - 78,326	7,763
90001073	Management Intern - Hourly	0.00	0.00	0.50	36,814 - 45,925	18,407
20000172	Payroll Specialist 1	1.00	1.00	1.00	51,693 - 62,224	52,565
20001222	Program Manager	2.00	2.00	2.00	72,886 - 268,057	267,247
20000779	Public Information Specialist	1.00	1.00	1.00	44,483 - 53,725	53,725
20000015	Senior Management Analyst	2.00	0.00	0.00	88,289 - 106,773	-
21000775	Senior Records Management Analyst	0.00	2.00	2.00	88,289 - 106,773	213,546
20000950	Stock Clerk	2.00	2.00	2.00	40,550 - 48,962	89,512
20000955	Storekeeper 1	1.00	1.00	1.00	46,712 - 56,019	56,019
90001146	Student Intern - Hourly	0.00	0.00	1.00	36,814 - 39,283	36,814
	Adjust Budget To Approved Levels					(151,784)
	Bilingual - Regular					40,768
	Budgeted Personnel					(194,057)
	Expenditure Savings					
	Other Certification Pays					7,961
	Overtime Budgeted					10,116
	Termination Pay Annual					31,162
	Leave					
	Vacation Pay In Lieu					53,834
<b>FTE, Salaries, and Wages Subtotal</b>		<b>50.32</b>	<b>50.32</b>	<b>52.73</b>		<b>\$ 4,185,446</b>

	FY2023 Actual	FY2024 Budget	FY2025 Adopted	FY2024-2025 Change
<b>Fringe Benefits</b>				
Employee Offset Savings	\$ 156,416	\$ 18,235	\$ 17,377	(858)
Flexible Benefits	473,014	505,218	557,066	51,848
Insurance	1,297	-	-	-
Long-Term Disability	14,400	12,572	15,177	2,605
Medicare	48,371	51,820	61,509	9,689
Other Post-Employment Benefits	245,035	261,694	198,624	(63,070)

# City Clerk

	FY2023 Actual	FY2024 Budget	FY2025 Adopted	FY2024-2025 Change
Retiree Medical Trust	4,054	5,097	7,133	2,036
Retirement 401 Plan	15,519	19,129	28,531	9,402
Retirement ADC	1,133,504	1,304,926	1,389,417	84,491
Retirement DROP	1,681	9,449	2,389	(7,060)
Risk Management Administration	59,805	59,202	66,528	7,326
Supplemental Pension Savings Plan	66,515	84,428	68,707	(15,721)
Unemployment Insurance	3,675	4,060	4,322	262
Workers' Compensation	61,201	62,575	76,675	14,100
<b>Fringe Benefits Subtotal</b>	<b>\$ 2,284,488</b>	<b>\$ 2,398,405</b>	<b>\$ 2,493,455</b>	<b>\$ 95,050</b>
<b>Total Personnel Expenditures</b>			<b>\$ 6,678,901</b>	



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