

| | Alternative One: Two Separate Offices (Assessor AND Clerk-Recorder-Elections) | Alternative Two: Single Consolidated Office (Clerk-Assessor-Recorder-Elections) | Implications for Yolo County |
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| Structure in Other Counties | <p>23 counties (including Yolo) currently utilize this structure.</p> <p>(The 23 counties include: Amador, Butte, Calaveras, Colusa, Contra Costa, Del Norte, El Dorado, Humboldt, Inyo, Lassen, Los Angeles, Mono, Nevada, Placer, Plumas, San Luis Obispo, Sierra, Stanislaus, Sutter, Ventura, Yolo, Yuba)</p> | <p>9 counties currently utilize this structure.</p> <p>(The 9 counties include: Glenn, Kings, Marin, Mendocino, Merced, Napa, San Mateo, Santa Barbara, Sonoma)</p> <p>Both Fresno and Stanislaus counties are also currently considering this alternative.</p> | <p>Both alternatives occur commonly in other counties, making either a reasonable and viable choice for Yolo.</p> <p>If the second alternative is selected, the expertise of 9 other counties is available to guide the process of consolidation.</p> |
| Legality | <p>California Government Code specifies ten elected county offices, including:</p> <p>(1) treasurer, (2) county clerk, (3) auditor, (4) sheriff, (5) tax collector, (6) district attorney, (7) recorder, (8) assessor, (9) public administrator, and (10) coroner.¹</p> <p>Counties can combine the ten offices in a variety of ways (including the county's existing structure), so long as the district attorney, assessor, and sheriff remain elected.²</p> | <p>The Board of Supervisors may by ordinance combine the clerk, assessor, recorder, and elections functions into a single elected office according to the California Government Code.³</p> | <p>Either alternative is legally allowable for Yolo County.</p> <p>Implementation of the second alternative requires only an ordinance from the Board of Supervisors.</p> |
| Cost Savings | <p>Costs would remain the same, or increase due to the increased demand for staffing in the Assessor's Office.</p> | <p>Would result in initial cost savings due to the elimination of a Department Head position.</p> <p>(Cost savings may be slightly offset by salary increases for several high level positions in new office to reflect increased responsibility.)</p> <p><u>EXAMPLE:</u> Santa Barbara County identified an initial \$182,000 in savings due to eliminating management positions, which was offset by \$28,000 in increased salaries and management restructuring.</p> <p>Also has the potential for future cost-savings through the sharing of resources and process improvements.</p> <p><u>EXAMPLE:</u> Santa Barbara County found that consolidation allowed them to reduce the lag time between property transfer and appraisal by two weeks, resulting in an additional \$7,000 in supplemental tax revenues annually.</p> | <p>If the second alternative is implemented the county will save a portion of the current County Clerk Recorder salary, which totals \$116,066 annually. The exact savings will depend on how salaries are restructured in the new office.</p> <p>The County may also save through the sharing of resources and process improvements, although these savings may be minimal and will likely require several years to be realized, as opportunities are identified and implemented.</p> |

¹ CALIFORNIA GOVERNMENT CODE: Division 2, Part 1, Chapter 1, Section 24009. <http://www.leginfo.ca.gov/cgi-bin/displaycode?section=gov&group=23001-24000&file=24000-24012>

² CALIFORNIA CONSTITUTION: Article 11, Section 1 (b). http://www.leginfo.ca.gov/const/article_11

³ CALIFORNIA GOVERNMENT CODE: Division 2, Part 1, Chapter 7, Section 24304. <http://www.leginfo.ca.gov/cgi-bin/displaycode?section=gov&group=24001-25000&file=24300-24308>

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| <p>Customer Service</p> | <p>Currently two offices with unique customer service delivery practices. Customers often require assistance from both the assessor and recorder, which means that they physically have to visit both offices (located in the same building, but on different floors). Customers are often inconvenienced by the current system.</p> <p><u>EXAMPLE:</u> The recorder is open on Fridays while the assessor is closed. Customers visiting on Friday dislike having to return another day to deal with assessor issues.</p> | <p>Counties that have completed this consolidation typically work toward eventually co-locating the consolidated offices to improve customer service. This co-location often results in a marked improvement of customer service, which is less obvious when the offices are located in different places.</p> <p>Even without co-located offices, the consolidation may allow the assessor and recorder to develop a more seamless process for responding to customer needs.</p> <p><u>EXAMPLE:</u> Following the Glenn County consolidation the assessor and clerk-recorder offices remained separately located for over ten years. Staff was trained on responsibilities of other offices to minimize the inconvenience to customers.</p> | <p>Implementing the second alternative would allow the offices to develop a more customer friendly method for interacting with Yolo residents, including cross training and process improvements that reduce inconvenience. If the offices are consolidated they may be co-located at some point in the future, allowing a single customer service desk where customers could be helped by receptionists trained in the needs of all four offices.</p> <p>Basic cross-training aimed at reducing the need for some customers to speak with people from different offices might be implemented even if the offices are not consolidated (dependent upon increased collaboration and communication between the two offices).</p> |
| <p>Staff Cross-Training</p> | <p>Staff in the existing clerk-recorder-elections office has already been cross-trained regarding all three functions within the office.</p> <p><u>EXAMPLE:</u> Elections staff often assists with recorder responsibilities.</p> <p>Little cross-training has been done between the assessor and clerk-recorder offices, even though the assessor and recorder deal with overlapping customers and documents.</p> | <p>Counties that use this alternative identify one benefit as the potential for a fully cross-trained staff, to help deal with the natural flow of staffing and workload, especially given the seasonal nature of elections.</p> <p><u>EXAMPLE:</u> Glenn County has trained the assessor staff to help with numerous elections responsibilities.</p> <p>Cross-training is least effective for assessor functions, as assessment is a highly technical job that requires a lot of judgment calls. However, in some cases counties have clerk-recorder-elections staff help with simple daily office responsibilities for assessor.</p> | <p>If the second alternative is implemented there is potential for increased staff cross-training, which may help to cover vacation/sick time, and periods of heavy workload across offices.</p> <p>Concerns exist that cross-training may be less effective in Yolo than it has been in other counties, due to the existing year-round heavy workload in the Yolo County Assessor's Office. Most counties stressed the benefit of cross-training staff to help with seasonal elections needs, but assessor staff has little flexibility to take on additional responsibilities at this time.</p> <p>However, Yolo County elections staff do have a lot of flexibility and discretion in workload, and may assist with general office needs, allowing the assessors to focus on more skilled responsibilities.</p> |

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| Process Improvements | <p>Currently two offices with unique processes, which sometimes results in overlap, conflict or duplication of work.</p> <p>EXAMPLE: The recorder scans and indexes documents, then exports the documents to the assessor. The assessor staff double checks that all documents are entered and correct. This step might be eliminated, freeing up more assessor time.</p> | <p>Other counties with consolidated offices have conducted process analysis to determine areas where efficiencies can be achieved, and have changed processes accordingly.</p> <p>Counties expressed that a single coordinated vision and leadership team improves process flow and accountability. Each employee knows what they are responsible for and what others are responsible for, so duplication of work is unnecessary.</p> | <p>The existing offices have several opportunities for process improvements. (The overlap in the processing of property documents is one example. The offices also use different indexing systems, which is unnecessary and creates confusion.)</p> <p>Some of these issues could be resolved without consolidation, if both offices worked collaboratively. However, different leadership styles could become a barrier to these process improvements if both offices are unwilling to compromise or focus on different priorities.</p> |
| Shared Resources | <p>Currently little sharing of staff, equipment, software and other resources between two offices.</p> | <p>Both offices have identified potential opportunities for shared software systems, which would improve work processes and data sharing.</p> <p>Also opportunities for sharing cross-trained staff.</p> <p>EXAMPLE: Glenn County hired a staff member to split between the assessor and recorder offices. The staff completes all recording responsibilities associated with the specific documents she uses as an assessor.</p> | <p>There is potential for sharing resources between the two offices, especially with regards to staff and software. Also might share general office supplies and equipment, and eventually office space.</p> <p>With the exception of a shared software system, these efficiencies are unlikely to be realized without consolidation.</p> <p>However, sharing of resources will be somewhat restricted (regardless of which alternative is selected) by budgetary constraints. The Clerk-Recorder's office receives some of its funding in trust funds, which are less flexible than general fund dollars.</p> |
| Leadership | <p>Currently two unique leaders with differing views on the direction and priorities of each office.</p> <p>Leader in each office can have specialized knowledge and skills pertaining to their office, which may be especially useful for the assessor.</p> | <p>Counties that have completed this consolidation stressed the importance of a dynamic and motivated leader to guide consolidation.</p> <p>Leader takes on more of an administrative than technical role. (Should have a skilled staff, including assistant department heads that can provide any technical knowledge the leader may lack.)</p> <p>Consolidations in other counties have most commonly involved the incumbent assessor taking over the newly consolidated elected office, although this is not always the case.</p> <p>EXAMPLE: Sonoma County successfully consolidated following the retirement of the assessor, with the clerk-recorder taking over the combined office.</p> | <p>An inspired leader could leverage existing knowledge in the department, and does not necessarily need extensive expertise in any of the consolidated functions. This makes the office easier to fill than a position demanding extensive technical knowledge.</p> <p>However, previous consolidations in other counties have typically occurred following the retirement of an assessor or clerk/recorder, allowing the Board to appoint the person who will initially begin the consolidation process. In the case of Yolo County, the first leader will be elected rather than appointed; the leadership style and vision of this person is currently unknown.</p> |