County of Santa Cruz

COUNTY ADMINISTRATIVE OFFICE

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SUSAN A. MAURIELLO, J.D., COUNTY ADMINISTRATIVE OFFICER

June 8,2005 Agenda: June **14,**2005

BOARD OF SUPERVISORS
County of Santa Cruz
701 Ocean Street
Santa Cruz, CA 95060

Dear Members of the Board:

As a part of the supplemental budget, your Board will consider the unified fee schedule which updates fees for services provided by the County. Although most fees are adopted by resolution, some require an ordinance to be implemented. County Counsel advises the fees addressed by this letter require an ordinance revision in order to be adopted. The proposed ordinance reflects changes to fees in the office of the Assessor-Recorder and the Clerk of the Board.

It is proposed that fees charged by the Assessor-Recorder for copying property transfer records be lowered to $62.57 per compact disk to reflect current costs. We understand that automation has allowed the process of retrieving records to become more efficient which results in a lower cost for the service to the public.

The Clerk of the Board is proposing to update the fee schedule to include a charge for records research on an at cost/ hourly basis of $43.03 per hour with no charge for the first hour. These are charges similar to those charged for research projects that are requested by members of the public in other county offices.

These costs may be amended from time to time based on the actual cost of service delivery.

IT IS THEREFORE RECOMMENDED THAT THE BOARD:

1. Adopt in concept the attached ordinance amending Section 2.36 of the County and direct that the ordinance to return on June 21, 2005;

2. Direct that the Clerk of the Board include the fee changes in the Unified Fee Schedule, effective August 1, 2005.

Very truly yours,

SUSAN A. MAURIELLO
County Administrative Officer

SAM:mt

ORDINANCE NO. __

ORDINANCE AMENDING CHAPTER 2.36 OF THE SANTA CRUZ COUNTY CODE BY ADDING SECTIONS 2.36.050 AND 2.36.060 SETTING CHARGES FOR COPYING AND RESEARCHING CERTAIN PUBLIC RECORDS

The Board of Supervisors of the County of Santa Cruz ordains as follows:

SECTION I

Chapter 2.36 of the Santa Cruz County Code is hereby amended by adding section 2.36.050 to read as follows:

2.36.050 Property transfer records copying charge.

Electronic copy of the weekly property transfer records maintained by the County Recorder ($62.57 per compact disk).

SECTION II

Chapter 2.36 of the Santa Cruz County Code is hereby amended by adding section 2.36.060 to read as follows:

2.36.060 Clerk of the board records research charge.

The clerk of the board's fee for researching those county records it is responsible for maintaining is $43.03 per hour, charged in fifteen-minute increments. The charge for the first hour is waived.

SECTION III

This ordinance shall take effect on the 31st day after the date of final passage.

PASSED AND ADOPTED this ____ day of _____,2005, by the Board of Supervisors of the County of Santa Cruz by the following vote:

AYES: SUPERVISORS
NOES: SUPERVISORS
ABSENT: SUPERVISORS

_____
Chairman of the Board of Supervisors

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Attest: _____

Clerk of the Board

APPROVED AS TO FORM:

Assistant County Counsel

COUNTY OF SANTA CRUZ

Auditor-Controller's Office

Inter-Office Correspondence

To: *Gary* Hazelton, Assessor-Recorder

CC: Mary Jo Walker, Chief Deputy Auditor-Controller

From: *Gary* Knutson, Auditor-Controller

Date: March 17,2005

Subject: Fees for Copies of Electronic Records

According to your request, we have prepared a **fee** study and make the following recommendation of a direct cost of providing compact disk copies of electronic records. Our **fee** study included software costs, labor costs, and supply costs.

SUMMARY OF COSTS

Direct Costs - CD and Jewel Case		$0.81
Software Costs		**54.33**
Labor Costs		
Departmental DP Coordinator	2.24	
Imaging Technician	5.14	
		7.38
TOTAL COST PER CD		$62.57*

* Total cost rounded to $60 for billing purposes.

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DIRECT COSTS

The direct costs per CD consist of the actual cost of each CD and jewel case.

SOFTWARE COSTS

In 2004/2005 the Recorder's Office paid an annual software maintenance fee for DFM software of $79,180. This software is used to record, index, image, store and burn documents. The software expense represents a 25% relational share of the annual software maintenance fee based upon an analysis of product functions used in the production of the weekly CDs.

There are 7 CDs prepared per week (1 master, 6 copies). 7/week x 52 weeks/year = 364 CDs prepared per year.

$79,180 fee x 1/4 software expense = $19,795 allocated annual software maintenance fee.
$19,795 / 364 CDs per year = $54.38 software cost per CD.

LABOR COSTS

The Assessor's Departmental Data Coordinator spends 20 minutes per week copying data onto a CD, and the Recorder's Imaging Technician spends 30 minutes per week burning 6 additional copies of the CD created by the Assessor's Departmental Data Coordinator.

We calculated a divisional rate for each division of the Assessor's and Recorder's staff and applied the appropriate rate to the time spent. We used actual 2003/2004 expenditure amounts and 2003/2004 OMBA A-87 cost allocation plan amounts to determine the overhead rate to apply.

Data Processing:
We calculated a rate for the Assessor's Data Processing division of $47/hour. The Departmental Data Coordinator works in this divisioo and spends 20 minutes per week on CD production.

20 minutes = 1/3 hour

1/3 x $47/hour = $15.67 per week

$15.57/week / 7 CDs per week = $2.24 data processing costs per CD.

Image Technician

We calculated a rate for the Recorder's Imaging Technician division of $72/hour. The Imaging Technician works in this division and spends 30 minutes per week on CD production.

30 minutes = 1/2 hour

1/2 x $72/hour = $36 per week

$36/week / 7 CDs per week = $5.14 per CD

Purpose: To calculate division billing rates for the different work divisions within the Assessor's department

Source: Calculation provided by the Auditor-Controller's office. Appiicabie data provided by the Assessor-Recorder and the County financial system, information noted as A-87 is the OMR A-87 Cost Ailocation Plan.

Scope: The Recorder's department is headed by the Assessor-Recorder. Therefore, Auditor calculated the overhead amount of the Assessor's department to be allocated to the Recorder's department.

Auditor calculated rates for the Assessor's department using an indirect cost rate methodology and productive hourly basis. Auditor calculated an allocation of Assessor's department management salaries and benefits, a percentage of services and supplies and overhead that is to allocable to the Recorder's department. This amount is subtracted from the calculation of the Assessor's billing rates and added to the calculation of the Recorder's rates.

The Assessor's department is divided for the purpose of this rate calculation into four work divisions. The percentage of each division's salary for 2003/2004 over the total 2003/2004 departmental salary is then applied to the services and supplies and A-87 overhead.

Conclusion:

The rate to be used for the CD calculation for the data processing division is $47 per hour. The Data Processing Coordinator in this division spends 20 minutes per week on CD processing.
The rate per CD is determined by multiplying 20 minutes (1/3 hour) per week x $47 per hourly rate = $15.67 per week
There are 7 CDs produced per week at a rate of : $15.67 per week / 7 CDs per week = $2.24 Data Processing Division cost per CD

Calculations:

ASSESSOR'S DEPARTMENT OVERHEAD (Index 109100) ALLOCATED TO RECORDER

Salaries & Benefits	Total		To Recorder's department	
Assessor-Recorder	198,809		35%	69,583
Chief Deputy Assessor	128,903		10%	12,890
Total Salary & Benefits Allocable tc Recorder's Department				82,473
Services & Supplies				
Services & Supplies	627,080			
A-87 Overhead to Assessor Dept.	232,778			
Subtotal Serv. & Sup. & A-87 Overhead		859,858		
Total Assessor's Budget	3,084,028			
Ratio			27.88%	
Services & Supplies & A-87 Overhead allocated to Recorder's dept.				22,994
Total Assessor Overhead Allocated to Recorder's Department				$105,468 TO BE SUBTRACTED BELOW

ASSESSOR'S RATE COMPUTATION

		Total	Admin	Assessment Division	Appraisal Division	Data Proc. Division
			Assessor Department Work Divisions			
Saiaries & Benefits		2,444,351	428,133	538,766	1,236,334	231,118
Services & Supplies	(1)	627,079	109,834	138,216	317,172	61,857
Total Direct Costs		3,071,430	537,967	676,982	1,553,506	302,975
A-87 Overhead to Recorder's department	(2)	232,778	40,772	51,307	117,737	22,962
Assessor Overhead to Recorder, per above	(2)	(105,468)	(18,473)	(23,246)	(53,345)	(10,404)
Subtota! Direct Costs & Overhead		2,965,962	560,266	705,043	1,617,898	315,533
Recorder's Admin Overhead Allocated to Divisions	(3)		(560,266)	149,712	343,552	67,002
Total Direct & Overhead Costs, Allocated		2,965,962	0	854,755	1,961,450	382,535
Productive Hours			7,650	14,641	29,859	7,128
Recorder's Dept. Administrative Hours Allocated to Divisions			(7,650)	2,169	4,425	1,056
Total Productive Hours			0	16,810	34,294	8,184
Hourly Rate				$51	$57	$47

FOOTNOTES

(1) Services and supplies allocated in Assessor's department based on salary and benefits allocations
(2) A-87 and Assessor's overhead allocated in Recorder's department based on total direct cost allocation
(3) Assessor's department administrative costs allocated based on the subtotal of direct cost and overhead allocation

Purpose: To calculate division billing rates for the different work divisions within the Recorder's department.

Source: Calculation provided by the Auditor-Controller's office. Applicable data provided by Assessor-Recorder, the County financial system and the OMB A-87 Cost Allocation Plan

Scope: Auditor calculated rates for the Recorder's department using an indirect cost rate methodology and productive hourly basis. Auditor calculated the overhead of the Assessor's department to be allocated to the Recorder's department by first determining from the staff from the Assessor's department allocable to the Recorder's department and their respective percentage to be allocated.

Auditor calculated a percentage of services and supplies and overhead from the Assessor's department allocable to the Recorder's department. The amount is subtracted from the calculation of the Assessor's billing rates and added to the calculation of the Recorder's rates.

The Recorder's department is divided for the purposes of this rate calculation into three work divisions. The percentage of each division's salary for 2003/2004 over the total 2003/2004 departmental salary is then applied to the services and supplies and A-87 overhead.

Conclusion:

The rate to be used for the CD calculation for the Imaging Tech. Division is $72 per hours. The Imaging technician in this division spends 30 minutes per week on CD processing
The rate per CD is determined by multiplying 30 minutes (1/2 hour) per week x $72 per hourly rate = $36 per week
There are 7 CDs produced per week at a rate of: $36 per week / 7 CDS per week = $5.14 Imaging Technical Division cost per CD

Calculations:

ASSESSORS DEPARTMENT OVERHEAD (Index 109100) ALLOCATED TO RECORDER

Salaries & Benefits			To Recorder	
Assessor	198,809		35%	69,583
Chief Deputy Assessor	128,903		10%	12,890
Total Salary & Benefits Allocable to Recorder's Department				82,473
Services & Supplies				
Services & Supplies	627,080			
A-87 Overhead to Assessor	232,778			
Subtotal Serv. & Sup. & A-87 Overhead		859,858		
Total Assessor's Budget	3,084,028			
Ratio			27.88%	
Services & Supplies & A-87 Overhead allocated to Recorder's dept.				22,994
Total Assessor Overhead Allocated to Recorder				$105,468

RECORDER'S RATE COMPUTATION		Total	Recorder Department Work Divisions: Admin.	Image Tech. Division	Legal Doc. Division
Salaries & Benefits		985,208	109,758	248,157	627,293
Services & Supplies	(1)	273,836	30,507	68,975	174,354
Total Direct Costs		1,259,044	140,265	317,132	801,647
A-87 overhead to Recorder's department	(2)	106.299	11,842	-26,775	67,682
Assessor overhead to Recorder, per above	(2)	1051468	11,750	26,566	67,153
Subtotal Direct Costs & Overhead		1,364,512	163,857	370,472	936,482
Recorder's Admin Overhead Allocated to Divisions	(3)		(163,857)	46,447	117,410
Total Direct & Overhead Costs, Allocated		1,364,512	0	416,919	1,053,892
Productive Hours			1,740	5.276	13,150
Recorder's department Administrative Hours Allocated to Divisions			(1,740)	498	1,242
Total Productive Hours			e	5,774	14,352
Hourly Rate				$72	**$73**

FOOTNOTES

(1) Services & Supplies allocated in Recorder's department based on Salary and Benefit allocations
(2) A-87 and Assessor's overhead allocated in Recorder's department based on total direct cost allocation
(3) Recorder's department administrative costs allocated based on the subtotal of direct cost and overhead allocation