

## Clerk & Recorder/Surveyor

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### Department Overview

The Clerk & Recorder is an Elected Official serving a four year term. The position was consolidated with the County Surveyor so the elected position is officially the County Clerk & Recorder / Surveyor. The Department is a part of the General Fund with a major portion of funding for the department coming from Fees collected as allowed by state law.

The Clerk & Recorder is responsible for two activities.

- Election activities dealing with all state, county, municipal, special district and special elections in the County;
- Document Recording and Indexing entails the maintenance of public records pertinent to lands and vital records;

In FY 2011 the Clerk & Recorder requested the Accounting activity be transferred to the County Commission. This transfer was approved to promote a more efficient and effective finance function. Accounting is included in the Finance Department as of FY 2011.

In addition, the Clerk & Recorder is the Clerk to the Board of County Commissioners.

The Surveyor portion of the Clerk & Recorder's job does not include staff positions. A stipend for the Surveyor duties is included in the Clerk & Recorder's salary.

The Clerk & Recorder acts as the County Election Administrator. State Law was amended to allow for additional compensation to be paid for Clerk & Recorder's who act as the Election Administrator.

Records Preservation is a separate fund established by state law, with revenue generated by a fee charged for documents filed with the Clerk & Recorder. This fund is an integral part of the Clerk & Recorder's ability to maintain and protect the important documents on file within the office. Without this funding source the ability to update records storage capabilities with new technologies would be hindered. The fund will transfer the cost of  $\frac{3}{4}$  of one employee to maintain staff in the records activity.

### Department Goals

- See Activity pages for specific goals

### Recent Accomplishments

See Activity pages for specific goals

# GENERAL GOVERNMENT

## Clerk & Recorder/Surveyor

### Department Budget

| Object of Expenditure | Actual<br>FY 2010          | Final<br>FY 2011           | Year End<br>FY 2011        | Request<br>FY 2012         | Preliminary<br>FY 2012     | Final<br>FY 2012           |
|-----------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| Personnel             | \$ 641,197                 | \$ 677,022                 | \$ 625,512                 | \$ 632,124                 | \$ 644,813                 | \$ 642,711                 |
| Operations            | 360,978                    | 479,414                    | 349,387                    | 385,730                    | 385,730                    | 393,956                    |
| Debt Service          | -                          | -                          | -                          | -                          | -                          | -                          |
| Capital Outlay        | 201,175                    | 719,868                    | 63,130                     | 148,221                    | 147,569                    | 151,216                    |
| Transfers Out         | 32,590                     | 32,590                     | 632,590                    | 32,590                     | 33,242                     | 33,242                     |
| <b>Total</b>          | <b><u>\$ 1,235,940</u></b> | <b><u>\$ 1,908,894</u></b> | <b><u>\$ 1,670,619</u></b> | <b><u>\$ 1,198,665</u></b> | <b><u>\$ 1,211,354</u></b> | <b><u>\$ 1,221,125</u></b> |

#### Budget by Fund Group

|                        |                            |                            |                            |                            |                            |                            |
|------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| General Fund           | \$ 926,350                 | \$ 1,006,436               | \$ 864,794                 | \$ 925,444                 | \$ 938,133                 | \$ 944,257                 |
| Special Revenue Funds  | 309,590                    | 902,458                    | 805,825                    | 273,221                    | 273,221                    | 276,868                    |
| Debt Service Funds     | -                          | -                          | -                          | -                          | -                          | -                          |
| Capital Project Funds  | -                          | -                          | -                          | -                          | -                          | -                          |
| Enterprise Funds       | -                          | -                          | -                          | -                          | -                          | -                          |
| Internal Service Funds | -                          | -                          | -                          | -                          | -                          | -                          |
| Trust & Agency Funds   | -                          | -                          | -                          | -                          | -                          | -                          |
| <b>Total</b>           | <b><u>\$ 1,235,940</u></b> | <b><u>\$ 1,908,894</u></b> | <b><u>\$ 1,670,619</u></b> | <b><u>\$ 1,198,665</u></b> | <b><u>\$ 1,211,354</u></b> | <b><u>\$ 1,221,125</u></b> |

#### Funding Sources

|                     |                            |                            |                            |                            |                            |                            |
|---------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| Tax Revenues        | \$ 162,819                 | \$ 203,853                 | \$ 193,461                 | \$ 186,978                 | \$ 174,405                 | \$ 167,543                 |
| Non-Tax Revenues    | 898,253                    | 930,033                    | 867,464                    | \$ 818,391                 | \$ 885,280                 | \$ 880,476                 |
| Cash Reappropriated | 174,868                    | 775,009                    | 609,694                    | 193,296                    | 151,670                    | 173,106                    |
| <b>Total</b>        | <b><u>\$ 1,235,940</u></b> | <b><u>\$ 1,908,894</u></b> | <b><u>\$ 1,670,619</u></b> | <b><u>\$ 1,198,665</u></b> | <b><u>\$ 1,211,354</u></b> | <b><u>\$ 1,221,125</u></b> |

### Department Personnel

| No. of<br>Positions     | FT/PT | Title | FTE      |
|-------------------------|-------|-------|----------|
| See individual Activity |       |       |          |
| <b>Total Program</b>    |       |       | <b>0</b> |

## Clerk & Recorder - Elections

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### Activity Overview

The Gallatin County Election Office is part of the Clerk and Recorder's Office in the General Fund, and is under the supervision of the Clerk & Recorder/ Surveyor. The Office does not generate a significant amount of non-tax revenue. When elections are held for political subdivisions other than the county, the expenses for conducting the election are reimbursed by that governing body.

The Election Office is responsible for elections held within the county. The staff maintains the voter registration database and election management software, and holds elections required by federal, state, and county government. The voter registration database is Gallatin County's portion of the statewide database known as Montana Votes. The office also conducts elections for the Cities and Towns of Belgrade, Bozeman, Manhattan, Three Forks, and West Yellowstone, and various special districts including fire, water/sewer, schools, and resort districts. In addition, the office provides election materials to the various school districts to assist them in performing their election duties.

Federal Laws regulating functions of the office include the National Voter Registration Act (NVRA) and the Help America Vote Act (HAVA). HAVA has been cited as the most significant election reform of federal election law since the Voting Rights Act of 1965.

The Clerk & Recorder acts as the County Election Administrator. State Law was amended to allow for additional compensation paid to those Clerk & Recorder's who act as the Election Administrator. The County approved payment of this stipend effective in October of 2005.

### Activity Goals

- Successfully complete elections for:
  - 13 Water & Sewer Districts,
  - 5 Municipalities
  - 1 Resort District,
  - 14 Rural Fire Districts,
  - 16 School Districts,
  - 1 Mosquito District,
  - the 2012 Federal Primary,
  - and any special elections that may arise.
- Continue to improve polling place accessibility.
- Consolidate 5 more polling places.
- Continue to increase the number of voters who vote by mail.
- Continue to maintain & correct street addresses in voter database to prepare for redistricting.
- Verify signatures for the medical marijuana and emanate domain statewide ballot initiatives by statutory deadlines.
- Continue to cross train employees between the recording and election offices.

### Recent Accomplishments

- Conducted 2010 General Election.
- Successfully completed the post election audit for the 2010 General Election.
- Completed 6 special district elections.
- Mailed approximately 18,000 annual absentee confirmation notices.
- Upgraded original ballot scanner with new scanner technology.
- Worked with the MT Association of the Blind to help educate voters with the AutoMark ballot marking machines.
- Assisted 15 school districts with their annual May school elections.

# GENERAL GOVERNMENT

## Clerk & Recorder - Elections

### Activity Budget

| Object of Expenditure | Actual<br>FY 2010 | Final<br>FY 2011  | Year End<br>FY 2011 | Request<br>FY 2012 | Preliminary<br>FY 2012 | Final<br>FY 2012  |
|-----------------------|-------------------|-------------------|---------------------|--------------------|------------------------|-------------------|
| Personnel             | \$ 141,536        | \$ 151,488        | \$ 130,132          | \$ 151,598         | \$ 154,342             | \$ 154,172        |
| Operations            | 208,235           | 222,166           | 166,643             | 178,850            | 178,850                | 178,850           |
| Debt Service          | -                 | -                 | -                   | -                  | -                      | -                 |
| Capital Outlay        | 7,175             | 15,000            | 5,895               | 30,000             | 30,000                 | 30,000            |
| Transfers Out         | -                 | -                 | -                   | -                  | -                      | -                 |
| <b>Total</b>          | <b>\$ 356,946</b> | <b>\$ 388,654</b> | <b>\$ 302,670</b>   | <b>\$ 360,448</b>  | <b>\$ 363,192</b>      | <b>\$ 363,022</b> |

#### Budget by Fund Group

|                        |                   |                   |                   |                   |                   |                   |
|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| General Fund           | \$ 356,946        | \$ 388,654        | \$ 302,670        | \$ 360,448        | \$ 363,192        | \$ 363,022        |
| Special Revenue Funds  | -                 | -                 | -                 | -                 | -                 | -                 |
| Debt Service Funds     | -                 | -                 | -                 | -                 | -                 | -                 |
| Capital Project Funds  | -                 | -                 | -                 | -                 | -                 | -                 |
| Enterprise Funds       | -                 | -                 | -                 | -                 | -                 | -                 |
| Internal Service Funds | -                 | -                 | -                 | -                 | -                 | -                 |
| Trust & Agency Funds   | -                 | -                 | -                 | -                 | -                 | -                 |
| <b>Total</b>           | <b>\$ 356,946</b> | <b>\$ 388,654</b> | <b>\$ 302,670</b> | <b>\$ 360,448</b> | <b>\$ 363,192</b> | <b>\$ 363,022</b> |

#### Funding Sources

|                     |                   |                   |                   |                   |                   |                   |
|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Tax Revenues        | \$ 175,600        | \$ 210,487        | \$ 199,962        | \$ 193,625        | \$ 200,486        | \$ 193,625        |
| Non-Tax Revenues    | 138,698           | 157,110           | 144,542           | 115,961           | 120,765           | 115,961           |
| Cash Reappropriated | 42,648            | 21,057            | (41,834)          | 50,862            | 41,941            | 53,436            |
| <b>Total</b>        | <b>\$ 356,946</b> | <b>\$ 388,654</b> | <b>\$ 302,670</b> | <b>\$ 360,448</b> | <b>\$ 363,192</b> | <b>\$ 363,022</b> |

### Activity Personnel

| No. of<br>Positions | FT/PT     | Title         | FTE |
|---------------------|-----------|---------------|-----|
| 3                   | Full-Time | Support Staff | 3   |
| 3                   |           | Total Program | 3   |

Clerk & Recorder - Elections

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2012 Budget Highlights

Personnel

- No change

Operations

- Reduction for change in polling locations and precincts resulted in a minimum of \$15,000 reduction in costs.
- Changed level of annual maintenance on AutoMark ballot marking machines saving \$4672.
- Moved printing of paper ballots to Billings, MT saving approximately \$10,000.
- Continued postage savings with the use of the non-profit mailing status.

Capital

- Contingency for ADA efforts at polling places and to prepare for state passing cost down to county.

County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the County Commission's goals, followed by the methods by which the Clerk & Recorder - Election department is striving to fulfill those goals.

Exceptional Customer Service

- Accurate Election information easily accessible to the public.
- Respond to inquiries in a customer friendly manner.

Be Model for Excellence in Government

- Timely response to election queries.
- Retain the integrity of the election process.

Improve Communications

- Interdepartmental Communication.
- Improve access to public information (information on website and media blitz).

To be the Employer of Choice

- A pleasant, respectful work environment.
- Retain current staff.

## GENERAL GOVERNMENT

### Clerk & Recorder - Elections

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#### WORKLOAD INDICATORS / PERFORMANCE MEASURES

| <b>Workload Indicators</b> |   | <b>Actual</b>  | <b>Actual</b>  | <b>Estimate</b> | <b>Projected</b> |
|----------------------------|---|----------------|----------------|-----------------|------------------|
| <b>Indicator</b>           |   | <b>FY 2009</b> | <b>FY 2010</b> | <b>FY 2011</b>  | <b>FY 2012</b>   |
| 1.                         | Number of voter applications processed        | 16,588         | 16,000         | 12140           | 16000            |
| 2.                         | Number of confirmation cards issued to voters | 16,588         | 27235          | 12140           | 16000            |
| 3.                         | Trained election judges                       | 0              | 300            | 0               | 275              |
| 4.                         | Number of ballots mailed                      | 48,520         | 68,000         | 42729           | 75000            |
| 5.                         | Number of signatures verified                 | 34,202         | 42,000         | 52500           | 80000            |
| 6.                         | Conduct successful elections                  | 10             | 12             | 7               | 8                |
| 7.                         | Annual Confirmation Cards mailed              |                |                | 18339           | 19500            |
| 8.                         | NVRA Cards Mailed                             |                |                | 26093           | 0                |

| <b>Performance Measures</b> |   | <b>Actual</b>  | <b>Actual</b>  | <b>Estimate</b> | <b>Projected</b> |
|-----------------------------|---|----------------|----------------|-----------------|------------------|
|                             | <b>FY 2008</b>  | <b>FY 2009</b> | <b>FY 2010</b> | <b>FY 2011</b>  | <b>FY 2012</b>   |
| 1.                          | % of voter registration applications processed within 60 days | 100%           | 100%           | 100%            | 100%             |
| 2.                          | % of confirmation cards mailed weekly                         | 100%           | 100%           | 80%             | 100%             |
| 3.                          | Results complied from election judge post election survey     | 0%             | 0%             | 0%              | 100%             |
| 4.                          | % of Absentee ballots mailed by required deadline             | 100%           | 100%           | 100%            | 100%             |
| 5.                          | % of Mail ballots mailed by required deadline                 | 100%           | 100%           | 100%            | 100%             |
| 6.                          | -Meet certification deadline                                  | 100%           | 100%           | 100%            | 100%             |
|                             | -Meet notification deadline                                   | 100%           | 100%           | 100%            | 100%             |
|                             | -Meet counting/canvas deadline                                | 100%           | 100%           | 100%            | 100%             |

#### Comments

## Clerk & Recorder - Records

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### Activity Overview

By Montana Law, the Recording Activity within the Clerk & Recorder's Office is responsible for the recording, indexing, safe keeping of land, county and birth / death documents. The activity also is responsible for the recording and maintenance of minutes for the County Commission.

Fees collected by the Clerk and Recorders' - Recording Activity generate a net income to the County General Fund and the Records Preservation Fund, as shown in the budget information on the next page. These revenues offset some of the costs associated with the other Clerk & Recorder activity (Elections).

The Records Department is a department where the traffic has moderated due to a slowdown in the growth in Gallatin County and an increased web presence. The first priority is to help the public find the records that they need. It is the goal to do this in an efficient manner that relies on technology and knowledgeable, helpful staff. The time that it takes to process documents is also a key to good service in the Recording Department. Records need to be accurate and as up to date as possible.

Records are currently in several different formats, including paper, microfilm and digital images. The Department is in the process of converting the older formats into the newer and more convenient and accessible digital format. This is a long-term project that will take years to complete.

Another duty of the Clerk & Recorder's Office is to provide certified searches of the records. Commonly, these include Uniform Commercial Code filings, Liens and other various real estate documents. This duty has decreased with the availability of Gallatin County records online for customers to perform their own searches.

Other types of documents that the Clerk & Recorder maintains are the supporting documentation of the County Commission actions. This includes Resolutions, Ordinances and Contracts that must be indexed and copied and distributed accurately.

### Activity Goals

- Maintain under a one-week turn-around time for returning documents to customers.
- Improve public access to records through electronic media (website, road petition database and vitals database).
- Assist customers in finding requested records in an efficient and helpful manner.

### Recent Accomplishments

- Maintained less than two-week turn-around time for returning documents 100% of the time.
- Continued public access to certain records through electronic media.
- Mailed approximately 4,450 tax notices to RID Maintenance owners.
- Continued monthly staff meetings to improve departmental communication.
- Entered 11,239 historical documents in EagleRecorder from 1988.
- Reviewed 40 surveys and documents showing a division of land that had no review through Planning.
- Provided EagleWeb access to Real Estate records for the public via our website. This generated \$6,000 in credit card transactions for online customers to purchase images of documents.
- Recorded 5141 electronic documents in EagleRecorder using the Quickdocs e-recording module.
- Scanned 2200 state highway plan images and nearly 500 historic air photos of Gallatin County.

### Activity Budget

# GENERAL GOVERNMENT

## Clerk & Recorder - Records

| Object of Expenditure | Actual<br>FY 2010 | Final<br>FY 2011  | Year End<br>FY 2011 | Request<br>FY 2012 | Preliminary<br>FY 2012 | Final<br>FY 2012  |
|-----------------------|-------------------|-------------------|---------------------|--------------------|------------------------|-------------------|
| Personnel             | \$ 499,661        | \$ 525,534        | \$ 495,380          | \$ 480,526         | \$ 490,471             | \$ 488,539        |
| Operations            | 69,743            | 92,248            | 66,744              | 84,470             | 84,470                 | 92,696            |
| Debt Service          | -                 | -                 | -                   | -                  | -                      | -                 |
| Capital Outlay        | -                 | -                 | -                   | -                  | -                      | -                 |
| Transfers Out         | -                 | -                 | -                   | -                  | -                      | -                 |
| <b>Total</b>          | <b>\$ 569,404</b> | <b>\$ 617,782</b> | <b>\$ 562,124</b>   | <b>\$ 564,996</b>  | <b>\$ 574,941</b>      | <b>\$ 581,235</b> |

### Budget by Fund Group

|                        |                   |                   |                   |                   |                   |                   |
|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| General Fund           | \$ 569,404        | \$ 617,782        | \$ 562,124        | \$ 564,996        | \$ 574,941        | \$ 581,235        |
| Special Revenue Funds  | -                 | -                 | -                 | -                 | -                 | -                 |
| Debt Service Funds     | -                 | -                 | -                 | -                 | -                 | -                 |
| Capital Project Funds  | -                 | -                 | -                 | -                 | -                 | -                 |
| Enterprise Funds       | -                 | -                 | -                 | -                 | -                 | -                 |
| Internal Service Funds | -                 | -                 | -                 | -                 | -                 | -                 |
| Trust & Agency Funds   | -                 | -                 | -                 | -                 | -                 | -                 |
| <b>Total</b>           | <b>\$ 569,404</b> | <b>\$ 617,782</b> | <b>\$ 562,124</b> | <b>\$ 564,996</b> | <b>\$ 574,941</b> | <b>\$ 581,235</b> |

### Funding Sources

|                     |                   |                   |                   |                   |                   |                   |
|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Tax Revenues        | \$ (12,780)       | \$ (6,634)        | \$ (6,501)        | \$ (6,647)        | \$ (26,082)       | \$ (26,082)       |
| Non-Tax Revenues    | 625,695           | 624,922           | 579,922           | 562,430           | 614,515           | 614,515           |
| Cash Reappropriated | (43,511)          | (506)             | (11,297)          | 9,213             | (13,492)          | (7,198)           |
| <b>Total</b>        | <b>\$ 569,404</b> | <b>\$ 617,782</b> | <b>\$ 562,124</b> | <b>\$ 564,996</b> | <b>\$ 574,941</b> | <b>\$ 581,235</b> |

## Activity Personnel

| No. of<br>Positions | FT/PT     | Title                               | FTE  |
|---------------------|-----------|-------------------------------------|------|
| 1                   | Full-Time | Elected Clerk & Recorder/Supervisor | 1    |
| 1                   | Full-Time | Recording Supervisor                | 1    |
| 1                   | Full-Time | GIS Technician                      | 1    |
| 8                   | Full-Time | Support Staff                       | 6.75 |
| 11.00               |           | Total Program                       | 9.75 |

Clerk & Recorder - Records

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2012 Budget Highlights

Personnel

- Reduction through attrition in FY 2011 of one Recording Clerk.

Operations

- Operations reduced for decrease in costs.

Capital

- No capital requests from General Fund – see Records Preservation Fund for approved capital.

County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the County Commission's goals, followed by the methods by which the Clerk & Recorder Records department is striving to fulfill those goals.

Exceptional Customer Service

- Knowledgeable, friendly, helpful staff.

Be Model for Excellence in Government

- Clear, consistent, accurate, accessible records using the best technology available.
- Accurately account for all revenue.

Improve Communications

- Internal Department communication.
- Communication with the public.
- Meet statutory requirements related to the recording of documents.
- Prepare long-term growth plan for the department.

To be the Employer of Choice

- Staff has training opportunities available to them.

## GENERAL GOVERNMENT

### Clerk & Recorder - Records

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#### WORKLOAD INDICATORS / PERFORMANCE MEASURES

| <b>Workload Indicators</b> |  | <b>Actual</b>  | <b>Actual</b>  | <b>Estimate</b> | <b>Projected</b> |
|----------------------------|--|----------------|----------------|-----------------|------------------|
| <b>Indicator</b>           |  | <b>FY 2009</b> | <b>FY 2010</b> | <b>FY 2011</b>  | <b>FY 2012</b>   |
| 1.                         | Documents filed/recorded                         | 26,562         | 31,939         | 30,292          | 30,000           |
| 2.                         | Deeds recorded                                   | 3,222          | 4,275          | 4,076           | 4,000            |
| 3.                         | Plats/surveys filed                              | 126            | 156            | 144             | 150              |
| 4.                         | New Condominium declarations recorded            | 30             | 16             | 10              | 10               |
| 5.                         | Total receipts                                   | 18,339         | 23,151         | 20,570          | 20,500           |
| 6.                         | Number of certified birth certificates issued    | 3,780          | 3,436          | 3,393           | 3,400            |
| 7.                         | Number of certified death certificates issued    | 4,465          | 4,890          | 5,258           | 5,200            |
| 8.                         | Minutes completed for County Commission meetings | 68             | 59             | 50              | 50               |

| <b>Performance Measures</b> |   | <b>Actual</b>  | <b>Actual</b>  | <b>Estimate</b> | <b>Projected</b> |
|-----------------------------|---|----------------|----------------|-----------------|------------------|
|                             |   | <b>FY 2009</b> | <b>FY 2010</b> | <b>FY 2011</b>  | <b>FY 2012</b>   |
| 1.                          | Process documents within 1 week of receipt          | 100%           | 100%           | 100%            | 100%             |
| 2.                          | % receipts completed without voids                  | 99.4%          | 99.6%          | 99.3%           | 99.6%            |
| 3.                          | Birth Certificates issued same day as request       | 100%           | 100%           | 100%            | 100%             |
| 4.                          | Death Certificates issued same day as request       | 100%           | 100%           | 100%            | 100%             |
| 5.                          | Commission minutes posted on website within 4 weeks | 79%            | 73%            | 51%             | 75%              |

#### Comments

## Clerk & Recorder – Records Preservation

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### Activity Overview

The Records Preservation Fund tracks revenues generated from a fee approved by the legislature for the Clerk and Recorder to maintain and preserve the records on file in the office.

The budget for the Records Preservation Fund has revenues that are reported and segregated in a separate fund. This fund allows the County to keep county records in a proper and professional manner. Expenses in this fund assist the Clerk and Recorder in preservation of records and provide services to customers by:

- Replacement of computers;
- Maintenance of equipment;
- Conversion of microfilm to digital format;
- Conversion of digital files to microfilm.
- Repair and preservation of historical paper records; and,
- Set aside funds for future records needs (shelving, cabinets, updates, equipment, off-site records storage and other records programs.)

The Records Preservation Fund is used for operating and capital expenses.

### Activity Goals

- Improve public access to records through electronic media (website, road petition database and vitals database).
- Convert remaining microfilmed records to digital images for use with the EagleRecorder system.
- Preserve birth and death records by placing them in clear non-reactive envelopes and storing them in binders.
- Preserve existing paper records for future use by the public.
- Provide enhanced GIS by linking Clerk & Recorder real estate records geographically to the county mapper.

### Recent Accomplishments

- In FY 2011 \$600,000 was transferred out of this fund to support the county in settling the deputy lawsuit. This resulted in the elimination of the planned contracting for digital storage of pre 1987 records.
- Received significant revenues for the Records Preservation Fund.
- Converted existing microfilmed records to digital images for use with Eagle Recorder. Have completed all images back to 1977.
- Converted digital images to microfilm for archival purposes of those documents recorded in the fiscal year.
- Preserve 6200 birth and death records by placing them in clear non-reactive envelopes and storing them in 32 custom binders.
- Maintained EagleRecorder, Tyler Content Manager, and ESRI ArcGIS software.
- Maintained Xerox large format scanner/printer system.
- Purchased and implemented eCommerce module of EagleRecorder for EagleWeb.
- Purchased and implemented Fraud Guard module of EagleRecorder for EagleWeb.

# GENERAL GOVERNMENT

## Clerk & Recorder – Records Preservation

### Activity Budget

| Object of Expenditure | Actual<br>FY 2010 | Final<br>FY 2011  | Year End<br>FY 2011 | Request<br>FY 2012 | Preliminary<br>FY 2012 | Final<br>FY 2012  |
|-----------------------|-------------------|-------------------|---------------------|--------------------|------------------------|-------------------|
| Personnel             | \$ -              | \$ -              | \$ -                | \$ -               | \$ -                   | \$ -              |
| Operations            | 83,000            | 165,000           | 116,000             | 122,410            | 122,410                | 122,410           |
| Debt Service          | -                 | -                 | -                   | -                  | -                      | -                 |
| Capital Outlay        | 194,000           | 704,868           | 57,235              | 118,221            | 117,569                | 121,216           |
| Transfers Out         | 32,590            | 32,590            | 632,590             | 32,590             | 33,242                 | 33,242            |
| <b>Total</b>          | <b>\$ 309,590</b> | <b>\$ 902,458</b> | <b>\$ 805,825</b>   | <b>\$ 273,221</b>  | <b>\$ 273,221</b>      | <b>\$ 276,868</b> |

### Budget by Fund Group

|                        |                   |                   |                   |                   |                   |                   |
|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| General Fund           | \$ -              | \$ -              | \$ -              | \$ -              | \$ -              | \$ -              |
| Special Revenue Funds  | 309,590           | 902,458           | 805,825           | 273,221           | 273,221           | 276,868           |
| Debt Service Funds     | -                 | -                 | -                 | -                 | -                 | -                 |
| Capital Project Funds  | -                 | -                 | -                 | -                 | -                 | -                 |
| Enterprise Funds       | -                 | -                 | -                 | -                 | -                 | -                 |
| Internal Service Funds | -                 | -                 | -                 | -                 | -                 | -                 |
| Trust & Agency Funds   | -                 | -                 | -                 | -                 | -                 | -                 |
| <b>Total</b>           | <b>\$ 309,590</b> | <b>\$ 902,458</b> | <b>\$ 805,825</b> | <b>\$ 273,221</b> | <b>\$ 273,221</b> | <b>\$ 276,868</b> |

### Funding Sources

|                     |                   |                   |                   |                   |                   |                   |
|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Tax Revenues        | \$ -              | \$ -              | \$ -              | \$ -              | \$ -              | \$ -              |
| Non-Tax Revenues    | 133,860           | 148,000           | 143,000           | 140,000           | 150,000           | 150,000           |
| Cash Reappropriated | 175,730           | 754,458           | 662,825           | 133,221           | 123,221           | 126,868           |
| <b>Total</b>        | <b>\$ 309,590</b> | <b>\$ 902,458</b> | <b>\$ 805,825</b> | <b>\$ 273,221</b> | <b>\$ 273,221</b> | <b>\$ 276,868</b> |

### Activity Personnel

| No. of<br>Positions                  | FT/PT | Title | FTE |
|--------------------------------------|-------|-------|-----|
| Staff is not funded in this activity |       |       |     |
| Total Program                        |       |       | 0   |

## Clerk & Recorder – Records Preservation

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### 2012 Budget Highlights

#### Personnel

- No personnel in the Record Preservation budget – ¾ funded FTE funded from transfer to County General Fund. (\$32,723 for FY 2012)

#### Operations

- Birth and Death record preservation project.
- Maintenance for all software products and equipment used in the office.
- Microfilm to digital and digital to microfilm conversion of images.
- Transfer for ¾ Clerk & Recorder support position.
- Program to link EagleRecorder/EagleWeb to GIS.

#### Transfer Out

- In FY 2011 \$600,000 was transferred out of this fund to support the county in settling the deputy lawsuit. This resulted in elimination of the planned contract for digital storage of pre 1987 records.

#### Capital

- Capital Reserve \$50,000.

### County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the County Commission's goals, followed by the methods by which the Clerk & Recorder Records department is striving to fulfill those goals.

#### Exceptional Customer Service

- Knowledgeable, friendly, helpful staff.
- Accessibility of land information.

#### Be Model for Excellence in Government

- Clear, consistent, accurate, accessible records using the best technology available.
- Accurately account for all revenue.

#### Improve Communications

- Internal Department communication.
- Communication with the public.
- Meet statutory requirements related to the recording of documents.
- Prepare long-term growth plan for the department.

#### To be the Employer of Choice

- Staff has training opportunities available to them.

## GENERAL GOVERNMENT

### Clerk & Recorder – Records Preservation

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#### WORKLOAD INDICATORS / PERFORMANCE MEASURES

| <b>Workload Indicators</b> |   | <b>Actual</b>  | <b>Actual</b>  | <b>Estimate</b> | <b>Projected</b> |
|----------------------------|---|----------------|----------------|-----------------|------------------|
| <b>Indicator</b>           |   | <b>FY 2009</b> | <b>FY 2010</b> | <b>FY 2011</b>  | <b>FY 2012</b>   |
| 1.                         | Record preservation revenue collected         | \$157,492      | \$150,732      | \$140,287       | \$140,000        |
| 2.                         | Converted digital records to microfilm        | 124,524        | 117,656        | 118,614         | 118,000          |
| 3.                         | Converted microfilm records to digital format | 15,000         | 27,217         | 35,905          | 41,000           |
| 4.                         | Archive and bind Birth and Death Certificates | n/a            | 6,200          | 6,200           | 6,200            |

| <b>Performance Measures</b> |  | <b>Actual</b>  | <b>Actual</b>  | <b>Estimate</b> | <b>Projected</b> |
|-----------------------------|--|----------------|----------------|-----------------|------------------|
| <b>Measure</b>              |  | <b>FY 2009</b> | <b>FY 2010</b> | <b>FY 2011</b>  | <b>FY 2012</b>   |
| 1.                          | Purchased all computers budgeted for on schedule               | 5              | 1              | 5               | 6                |
| 2.                          | Loaded & proofed converted historic digital images             | 50%            | 100%           | 100%            | 100%             |
| 3.                          | Purchased binders and bind historic ½sheet birth and death cfs | N/A            | 33%            | 67%             | 100%             |

#### Comments