

MISSION

The *Recorder-Clerk's* mission is to provide reliable repository for public records and to provide efficient service to the public in a way that exemplifies the highest standard of courtesy, cost effectiveness, and ethical performance. Public records will be readily accessible in a convenient manner while safeguarding confidentiality and the security of those records. The Clerk's function provides Birth, and Death certified copies along with all types of licenses. In addition, the Clerk performs marriage ceremonies.

DEPARTMENT BUDGET SUMMARY

	16-17 Actuals	17-18 Budget	18-19 Dept Requested	18-19 CAO Recommend	Change from Budget to Recommend	% Change
Licenses, Permits	\$ 89,845	\$ 79,000	\$ 85,000	\$ 85,000	\$ 6,000	8%
Charges for Service	\$ 791,919	\$ 745,000	\$ 820,000	\$ 820,000	\$ 75,000	10%
Miscellaneous	\$ 286,382	\$ 260,000	\$ 280,000	\$ 280,000	\$ 20,000	8%
Other Financing Sources	\$ 451,160	\$ 586,000	\$ 707,222	\$ 736,975	\$ 150,975	26%
Total Revenue	\$ 1,619,306	\$ 1,670,000	\$ 1,892,222	\$ 1,921,975	\$ 251,975	15%
Salaries and Benefits	\$ 1,279,560	\$ 1,391,473	\$ 1,447,391	\$ 1,473,432	\$ 81,959	6%
Services & Supplies	\$ 164,882	\$ 198,829	\$ 418,227	\$ 418,227	\$ 219,398	110%
Intrafund Transfers	\$ 10,303	\$ 10,828	\$ 9,524	\$ 9,524	\$ (1,304)	-12%
Total Appropriations	\$ 1,454,745	\$ 1,601,130	\$ 1,875,142	\$ 1,901,183	\$ 300,053	19%
Net County Cost	(164,561)	(68,870)	(17,080)	(20,792)	48,078	-70%
FTEs	16.0	16.0	16.0	16.0	-	0%

MAJOR BUDGET CHANGES

Revenue*Charges for Services*

\$81,000 Increase in Recording Fees (\$75,000) and Marriage License fees (\$6,000) based on current estimates, and reflecting the 10% administration fee for the processing of \$75.00 per document fee as required by SB2-Building Homes and Jobs Act.

Misc. Revenue

\$20,000 Increase in Miscellaneous fees related to filing fictitious business name statements, examination and posting of environmental documents, registration of process servers and acceptance and filing of notary bonds, based on current estimates.

Other Financing Sources

\$150,975 Net increase in operating transfers from dedicated Special Revenue Funds, based on anticipated use, including \$152,975 from the Modernization Fund to cover the purchase of a new Recording-Clerk Management System.

Recorder-Clerk

RECOMMENDED BUDGET • FY 2018 - 19

Appropriations

Salaries and Benefits

- \$44,515 Net Increase due to the addition of a new full-time Elected Recorder-Clerk position in January 2019 (\$96,420) offset by a reduction for the retirement of the current Recorder-Clerk/Registrar of Voters in December 2018 (\$51,905). Current Recorder-Clerk position is charged 50% to Elections Department.
- \$44,306 Increase for a 4-month overlap of the Assistant County Recorder position to allow for cross-training due to the retirement of incumbent in October 2018.
- \$15,460 Increase in Temporary Help based on updated projections.

Services and Supplies

- \$219,398 Net increase in Professional Services, Computer Maintenance and Special Department Expense related to purchase of new, upgraded Recording and Clerk Management System for \$323,222, offset by reductions of \$103,824 in other items based on trend and a reduction in support costs for the old system.

PROGRAM SUMMARIES

Recorder

The Recorder is responsible for examination and recording of all documents presented for recording that deal with establishing ownership of land in the County or as required by statute; administering the real property transfer tax law and maintenance of a permanent record and indexes of all documents for public viewing, plus providing certified copies requested by the public; recording of all lawful documents such as deeds of trust, judgments, liens, affidavits, Uniform Commercial Code Financial Statements, etc. and the filing of births, deaths and marriages. The office also files records of surveys, parcel maps, subdivisions and assessment maps. Also provided are copies of all Assessors' Plat Maps. In addition, online, electronic recording is now available through the Recorder's Office.

Effective January 1, 2018 a new fee was mandated by the State to help fund Homelessness with Government Code 27388.1. SB2, the "Building Homes and Jobs Act", requires a \$75.00 per document fee for recorded documents (with a maximum fee of \$225 per transaction) with few exceptions. Some of the exceptions are recordings in connection with documents that include transfer tax, recordings not deemed as "real property", and recordings in connection with transfers of owner-occupied property. There is no sunset date on this fee.

Clerk

The County Clerk provides non-judicial public services such as filing of Fictitious Business Name Statements, issuance of Photocopier, Process Server and Unlawful Detainer Assistant licenses and I.D. cards; maintaining official County records and indices for documents pertaining to the above activities. The Clerk also handles notary bonds, process server bonds, official bonds, and oaths of elected and appointed officials and issues all marriage licenses, performs ceremonies and provides instruction for deputies authorized to perform marriages.

(Government Code 27230 – 27297 and the Family Code 400-500 prescribe most of the duties of the Recorder-Clerk.)

Pending Issues

The recommended Budget includes funding for the purchase of a new Recording and Clerk Management system. This will replace the current system which has been in place for over 19 years. The previous vendor was acquired by a new vendor and the new vendor will not support the existing system past December 2018. Technical staff were transferred to the new company during the acquisition, and this will provide for a smooth transition since County staff is very familiar with the vendor technical staff. Other counties have made this transition with success. As with all system conversions, there are a few uncertainties, however the Department is confident that the transition will be smooth and that the outcome will be a much more robust and automated system that will increase efficiencies and improve service delivery.

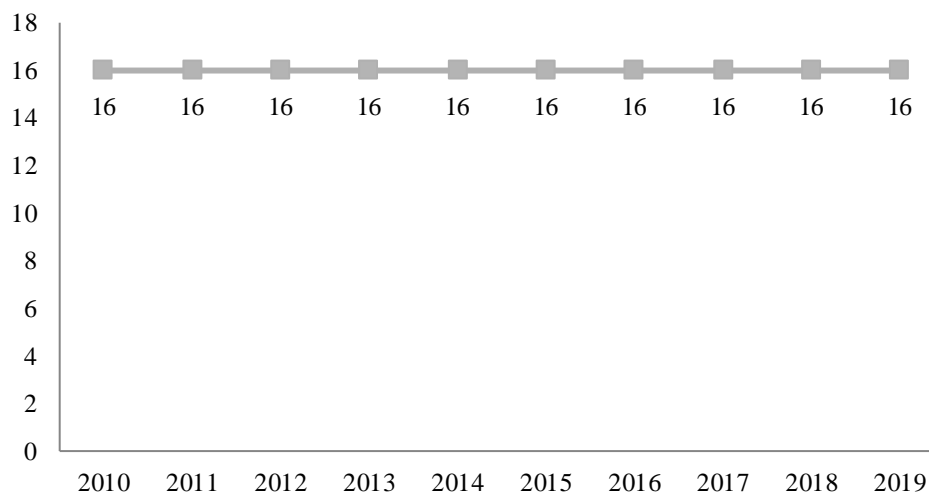
The Recorder-Clerk and the Assistant County Clerk will be retiring in 2018, and this will leave a gap in department knowledge and leadership. In order to help with this transition to new leadership and a new Elected Recorder-Clerk in January 2019, the Board approved the temporary addition of an overlap position for the Assistant County Clerk. This will allow the Department to recruit for, hire and cross train a new Assistant County Clerk prior to the retirement of the incumbent.

BUDGET SUMMARY BY PROGRAM

	Appropriations	Revenues	Net County Cost	Staffing
Recorder Clerk	\$ 1,901,183	\$ 1,921,975	\$ (20,792)	16
Total	\$ 1,901,183	\$ 1,921,975	\$ (20,792)	16

STAFFING TREND

Staffing for the Recorder-Clerk over the past ten years has not changed. The proposed staff allocation for FY 2018-19 is 16 with 14 FTE on the West Slope and 2 FTE at South Lake Tahoe. Staff located in South Lake Tahoe perform all functions of the Recorder and Clerk with the exception of actual recording of documents.



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BEST PRACTICES & SERVICE INDICATORS

In accordance with the Strategic Plan, the following best practices and service indicators will be implemented and measured throughout FY 2018-19. Results will be included each year to measure progress and levels of service.

Service Indicators

- 1) Number of documents recorded in 2017 was 59,790.
- 2) Number of documents recorded electronically was 34,761 or, 58% of all documents.
- 3) Number of marriage licenses issued in 2017 was 3,076.
- 4) Number of Vital Statistic Copies issued 10,007.
- 5) Number of transfer taxes reviewed was 6,885.
- 6) Deputy Commissioners for a Day were 93.

RECOMMENDED BUDGET

This Budget is recommended at \$1,901,183, which is an increase of \$300,053 (18.7%) over the FY 2017-18 Adopted Budget.

The General Fund cost for this Department is recommended at (\$20,792). The General Fund cost is increasing by \$48,078 when compared to the FY 2017-18 Adopted Budget because the FY 2017-18 Adopted Budget reflected a Net County Cost of (\$68,870). Costs in the Recorder-Clerk Department are substantially offset by Recording Fee revenue, and the Department currently does not require General Fund support.

The one-time purchase of a Recorder-Clerk Management System is budgeted at \$323,222. This reflects a total of \$256,962 for software licensing, implementation and Professional Services, plus \$20,000 for SQL Licenses and \$46,260 for annual maintenance. Following the transition to the new system, it is anticipated that current system maintenance costs will decrease, resulting in a net ongoing cost increase for both the Recorder and Clerk management modules of approximately \$10,000 per year.

CAO Adjustments

The Recommended Budget increases appropriations by \$44,307 for the addition of an overlap of the Assistant County Clerk position for approximately four months to allow the Department to recruit, hire, and cross train a new Assistant County Clerk prior to the retirement of the incumbent. Additional increases in revenue from the Modernization Special Revenue Fund by \$29,753 were to offset the anticipated General Fund impact of the overlap position.

Sources & Uses of Funds

The Recorder Division is primarily funded by fees and typically has no Net County Cost.

It should be noted that the Recorder-Clerk is responsible for collecting the Property Transfer Tax, which is a tax that is levied on the sale of property at the time the transfer documents are recorded. These revenues are collected in Department 15 – General Fund Other Operations.

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State law provides for the collection of additional fees through the Recorder-Clerk for certain documents for specified purposes. These revenues are held in Special Revenue Funds and transferred to the department to offset expenditures that are appropriate for reimbursement by those funds. The Recommended Budget reflects the following use of the Special Revenue Funds:

- \$250,000 Micrographics fund to cover salaries, equipment costs and services associated with the conversion of microfilm documents to digital image.

- \$352,975 Modernization fund to cover salaries, services and supplies, to help offset the Net County Cost of the Department. In FY 2018-19, funds will also cover the purchase of the new Recorder-Clerk Management system.

- \$73,000 Electronic Recording Delivery System fund to cover the cost of regulation and oversight of electronic decoding by the Attorney General.

- \$40,000 Vital Health Statistics fund used to offset the cost of modernization of vital records management. This fee is no longer collected as of January 1, 2018.

- \$20,000 Social Security Truncation fund used for efforts to truncate social security numbers in recorded documents.

- \$1,000 Notary fund used for administration of confidential marriages.

FINANCIAL INFORMATION BY FUND TYPE

FUND TYPE: 10 GENERAL FUND
DEPARTMENT: 28 RECORDER / CLERK

		CURRENT YR APPROVED BUDGET	DEPARTMENT REQUEST	CAO RECOMMENDED BUDGET	DIFFERENCE CURR YR CAO RECMD
TYPE: R REVENUE					
SUBOBJ	SUBOBJ TITLE				
0261	LICENSE: MARRIAGE	79,000	85,000	85,000	6,000
CLASS: 02	REV: LICENSE, PERMIT, &	79,000	85,000	85,000	6,000
1600	RECORDING FEES	736,000	810,000	810,000	74,000
1604	RECORDING FEES CD REPRODUCTION	9,000	10,000	10,000	1,000
CLASS: 13	REV: CHARGE FOR SERVICES	745,000	820,000	820,000	75,000
1940	MISC: REVENUE	260,000	280,000	280,000	20,000
CLASS: 19	REV: MISCELLANEOUS	260,000	280,000	280,000	20,000
2020	OPERATING TRANSFERS IN	65,000	93,000	93,000	28,000
2028	OPERATING TRSNF IN: COMPUTER	200,000	323,222	352,975	152,975
2029	OPERATING TRSNF IN: MICROGRAPHICS	290,000	250,000	250,000	-40,000
2030	OPERATING TRSNF IN: VITAL STATISTICS	30,000	40,000	40,000	10,000
2031	OPERATING TRSNF IN: LICENSE NOTARY	1,000	1,000	1,000	0
CLASS: 20	REV: OTHER FINANCING SOURCES	586,000	707,222	736,975	150,975
TYPE: R SUBTOTAL		1,670,000	1,892,222	1,921,975	251,975

Recorder-Clerk

RECOMMENDED BUDGET • FY 2018 - 19

FINANCIAL INFORMATION BY FUND TYPE

FUND TYPE: 10 GENERAL FUND
DEPARTMENT: 28 RECORDER / CLERK

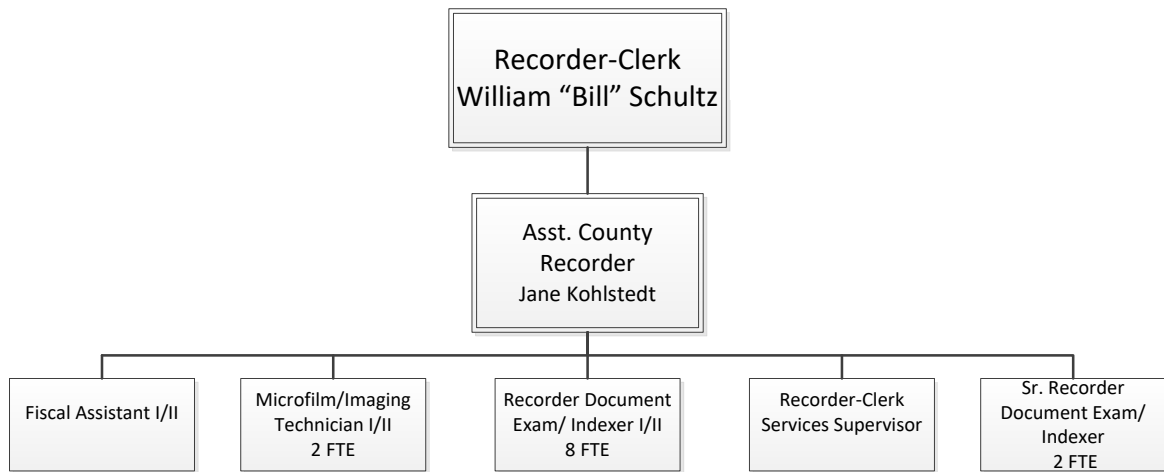
	CURRENT YR APPROVED BUDGET	DEPARTMENT REQUEST	CAO RECOMMENDED BUDGET	DIFFERENCE CURR YR CAO RECMD
TYPE: E EXPENDITURE				
SUBOBJ SUBOBJ TITLE				
3000 PERMANENT EMPLOYEES / ELECTED	816,698	800,569	828,750	12,052
3001 TEMPORARY EMPLOYEES	0	15,460	15,460	15,460
3002 OVERTIME	1,000	1,500	1,500	500
3004 OTHER COMPENSATION	9,547	15,500	15,500	5,953
3005 TAHOE DIFFERENTIAL	4,800	4,800	4,800	0
3020 RETIREMENT EMPLOYER SHARE	198,987	202,550	205,086	6,099
3022 MEDI CARE EMPLOYER SHARE	11,911	11,710	12,133	222
3040 HEALTH INSURANCE EMPLOYER	309,203	321,425	331,810	22,607
3041 UNEMPLOYMENT INSURANCE EMPLOYER	0	20,012	2,451	2,451
3042 LONG TERM DISABILITY EMPLOYER	2,040	1,998	1,998	-42
3043 DEFERRED COMPENSATION EMPLOYER	4,387	3,384	3,384	-1,003
3046 RETIREE HEALTH: DEFINED	16,148	16,160	16,160	12
3060 WORKERS' COMPENSATION EMPLOYER	14,988	21,823	21,823	6,835
3080 FLEXIBLE BENEFITS	1,764	10,500	12,577	10,813
CLASS: 30 SALARY & EMPLOYEE BENEFITS	1,391,473	1,447,391	1,473,432	81,959
4040 TELEPHONE COMPANY VENDOR	0	500	500	500
4041 COUNTY PASS THRU TELEPHONE CHARGES	1,000	0	0	-1,000
4080 HOUSEHOLD EXPENSE	400	300	300	-100
4100 INSURANCE: PREMIUM	5,999	5,235	5,235	-764
4140 MAINT: EQUIPMENT	6,500	6,500	6,500	0
4141 MAINT: OFFICE EQUIPMENT	500	100	100	-400
4144 MAINT: COMPUTER	28,000	66,260	66,260	38,260
4221 MEMBERSHIPS: LEGISLATIVE ADVOCACY	2,000	1,500	1,500	-500
4260 OFFICE EXPENSE	16,000	16,000	16,000	0
4261 POSTAGE	20,000	20,000	20,000	0
4262 SOFTWARE	300	500	500	200
4263 SUBSCRIPTION / NEWSPAPER / JOURNALS	150	150	150	0
4264 BOOKS / MANUALS	500	500	500	0
4300 PROFESSIONAL & SPECIALIZED SERVICES	95,930	133,710	133,710	37,780
4307 MICROFILM IMAGING SERVICES	250	1,200	1,200	950
4420 RENT & LEASE: EQUIPMENT	7,200	5,220	5,220	-1,980
4460 EQUIP: SMALL TOOLS & INSTRUMENTS	100	100	100	0
4461 EQUIP: MINOR	500	500	500	0
4462 EQUIP: COMPUTER	7,000	2,600	2,600	-4,400
4500 SPECIAL DEPT EXPENSE	0	150,252	150,252	150,252
4503 STAFF DEVELOPMENT	2,000	2,500	2,500	500
4600 TRANSPORTATION & TRAVEL	750	900	900	150
4602 MILEAGE: EMPLOYEE PRIVATE AUTO	750	700	700	-50
4605 RENT & LEASE: VEHICLE	400	400	400	0
4606 FUEL PURCHASES	100	100	100	0
4608 HOTEL ACCOMMODATIONS	2,500	2,500	2,500	0
CLASS: 40 SERVICE & SUPPLIES	198,829	418,227	418,227	219,398
7200 INTRAFUND TRANSFERS: ONLY GENERAL	500	0	0	-500
7210 INTRAFND: COLLECTIONS	50	0	0	-50
7223 INTRAFND: MAIL SERVICE	9,050	8,080	8,080	-970
7224 INTRAFND: STORES SUPPORT	628	944	944	316
7231 INTRAFND: IS PROGRAMMING SUPPORT	0	500	0	0
7232 INTRAFND: MAINT BLDG & IMPROVMNTS	600	0	500	-100
CLASS: 72 INTRAFUND TRANSFERS	10,828	9,524	9,524	-1,304
TYPE: E SUBTOTAL	1,601,130	1,875,142	1,901,183	300,053
FUND TYPE: 10 SUBTOTAL	-68,870	-17,080	-20,792	48,078
DEPARTMENT: 28 SUBTOTAL	-68,870	-17,080	-20,792	48,078

PERSONNEL ALLOCATION

Classification Title	2017-18 Adjusted Allocation	2018-19 Dept Request	2018-19 CAO Recm'd	Diff from Adjusted
County Recorder/Clerk*	1.00	1.00	1.00	-
Assistant County Recorder	1.00	1.00	1.00	-
Fiscal Assistant I/II	1.00	1.00	1.00	-
Microfilm/Imaging Technician I/II	2.00	2.00	2.00	-
Recorder Document Examiner/Indexer I/II	8.00	8.00	8.00	-
Recorder-Clerk Services Supervisor	1.00	1.00	1.00	-
Sr. Recorder Document Examiner/Indexer	2.00	2.00	2.00	-
Department Total	16.00	16.00	16.00	-

*Recorder-Clerk/Registrar of Voters retiring Dec. 2018, Elected County Recorder-Clerk (1.0) added effective Jan. 1, 2019

ORGANIZATIONAL CHART



Total FTE: 16

Note: 1 Sr. Rec Doc Ex-Indexer & 1 Rec Doc Ex-Indexer work at the SLT Office