

## 059 - CLERK-RECORDER

### Operational Summary

#### Mission:

The Clerk-Recorder Office's mission is 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 to citizens/taxpayers in a convenient manner while safeguarding confidentiality and the security of those records.

#### Strategic Goals:

- Provide prompt and reliable service to the public
- Enhance public records accessibility
- Safeguard security over the public's records

#### Key Outcome Indicators:

Performance Measure	2002 Business Plan Results	2003 Business Plan Target	How are we doing?
<b>CONTINUE CUSTOMER SATISFACTION SURVEYS WHICH RATE OVERALL VALUE OF OUR SERVICE TO THE PUBLIC.</b> <b>What:</b> Survey forms measure customer satisfaction and ensure we are addressing customer needs. <b>Why:</b> Quality customer service is our top priority.	Survey results are 98% above standard.	Survey results are targeted to be at least 98% above standard.	The Orange County Clerk-Recorder's Office provides the highest level of service at the lowest cost-per-service unit of any major county in California.
<b>THE NUMBER OF DOCUMENTS UTILIZING ELECTRONIC RECORDING.</b> <b>What:</b> This measurement provides higher levels of transactions with minimal staffing increases. <b>Why:</b> Public has access to recorded documents within short timeframes.	478,955 documents using electronic recording were processed.	600,000 documents are targeted to use Electronic Recording.	Documents submitted via Electronic Recording are recorded within one-two hours of submittal.
<b>NUMBER OF RECORDS CONVERTED TO ALTERNATE MEDIA TO ENSURE EASE OF ACCESS AND PRESERVATION AND SAFETY.</b> <b>What:</b> This measurement is a tool to evaluate efforts to provide access and safeguard the public's records. <b>Why:</b> To provide added security to public records now and for future retrieval.	95,000 vital record images transferred from microfilm to digitized images.	Over 2.5 million official records targeted for processing to digital images.	The Office's technology plan enhancements are on track and priority continues to be placed on security of records.

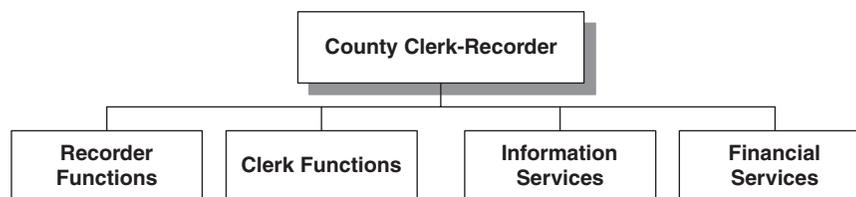
#### At a Glance:

Total FY 2002-2003 Actual Expenditure + Encumbrance:	7,567,917
Total Final FY 2003-2004 Budget:	9,738,723
Percent of County General Fund:	0.40%
Total Employees:	102.00

## Fiscal Year FY 2002-2003 Key Project Accomplishments:

- Among major breakthroughs for the Clerk-Recorder's Office in 2002: The number of title and insurance companies that record electronically has grown from 51 in 2001 to 57 users. Electronic Recording (ER) customers submit an average of 2,228 documents daily, with the total number of electronically recorded documents exceeding 1.7 million since implementation in 1997.
- The Office recorded a record high of one million documents for Fiscal Year 2001-02. These recordings are a result, in part, of interest rates at a 40-year low. New real estate sales and second deeds of trust recordings continue at high levels.
- In October 2002, an automated marriage license application was implemented. This system allows customers to input their license application information into our system. It expedites the application, reduces customer-waiting period, ensures error free license production, and eliminates multiple data entry.
- On October 22, 2002, the office unveiled its newly remodeled marriage ceremony room. The room has turn of the century decor, offering the look and feel of the Old Courthouse ambiance. The remodel was paid for by marriage license fees. It is completely portable (in the event of relocation) and offers clients wishing to utilize this civil ceremony service a tasteful and convenient location.
- Important to the County future ability to maintain, store and retrieve public records was the acquisition and the installation of a mass storage unit. For the purpose of further ensuring record security, it was relocated to the County's Data Center.
- A major automation project this year was to increase the available document numbering system from 6 to 8 digits. The existing system is programmed to accommodate numbers up to 999,999. Due to record high real property recordings, the office reached one million documents in November 2002. This numbering enhancement required new programming, integration with multiple office systems, and a full conversion.
- Installation of a fully reliable, user-friendly cashiering system, which produces accounting reports and related applications, was another significant step forward for the Office in late 2002.
- Mid-year the office began producing a monthly statistical report, which includes workload information, revenue collection and distribution, and budgetary projections.
- In September, 2002 the office developed a Community Outreach presentation, "What Does the Clerk-Recorder's Office Do for You?" which is currently being presented to various community groups, as well as other county agencies.
- In November, 2002 the office implemented a new multi-line telephone system throughout the office.

## Organizational Summary



**COUNTY CLERK-RECORDER** - The Clerk-Recorder is an elected official who, with the administrative staff, directs the activities of the department in satisfying the needs of the public regarding the recordation of various real property documents, filing of birth, death and marriage records, issuing marriage licenses, and filing Fictitious Business Names and other documents.

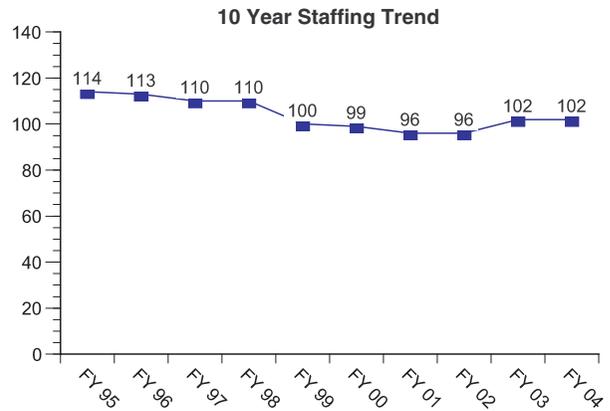
**RECORDER FUNCTIONS** - This division assists the public and title companies in recording documents pertaining to real property transactions. Included in this process is the examination of documents to determine recordability, recording and indexing documents, and optically imaging all recorded documents for storage and retrieval.

**CLERK FUNCTIONS** - This division is responsible for issuing marriage licenses and performing civil wedding ceremonies. It also registers Notary Publics, Process Servers, Professional Photocopiers, and Unlawful Detainer Assistants; files documents related to Fictitious Business Name registrations and Environmental Impact Reports; and produces copies of recorded documents and issues birth, death, and marriage certificates. The Archives division identifies, collects, preserves, arranges, maintains records of historical significance relevant to the County and County government, and educates the public as to their use. The Archives serves as both a repository for these unique documents and as a resource center open to the public.

**INFORMATION SERVICES** - This division provides technical and user support for all automated systems within the department. Staff provides short and long term automation planning, systems installation, user training, systems maintenance, and telecommunications support.

**FINANCIAL SERVICES** - This division is responsible for the fiscal integrity of the Department through the assessment of funding needs and fiscal issues that may impact Department activities. This includes budget planning, development, monitoring and implementation; oversight of expenditures and revenues; purchasing and deposit of funds.

**Ten Year Staffing Trend:**



**Ten Year Staffing Trend Highlights:**

- No new positions were added in FY 2003-2004.
- Four additional staff positions were added in FY 2002-2003 to accommodate workload increases for the recording of documents and to support and maintain the Archives Program.

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**Budget Summary**

**Plan for Support of the County's Strategic Priorities:**

The Clerk-Recorder's Office will continue to review costs of operation, maximize service to the public, and contribute revenues in excess of expenses to the County General Fund.

## Final Budget and History:

Sources and Uses	FY 2001-2002 Actual Exp/Rev	FY 2002-2003 Budget As of 6/30/03	FY 2002-2003 Actual Exp/Rev <sup>(1)</sup> At 6/30/03	FY 2003-2004 Final Budget	Change from FY 2002-2003 Actual	
					Amount	Percent
Total Positions	-	102	102	102	0	0.00
Total Revenues	16,361,380	14,443,423	22,132,724	15,982,639	(6,150,085)	-27.79
Total Requirements	6,411,908	7,899,507	7,400,418	9,738,723	2,338,305	31.60
Net County Cost	(9,949,472)	(6,543,916)	(14,732,306)	(6,243,916)	8,488,390	-57.62

(1) Amounts include prior year expenditures and exclude current year encumbrances. Therefore, the totals listed above may not match Total FY 2002-03 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Detailed budget by expense category and by activity is presented for agency: Clerk-Recorder in the Appendix on page 485.

### Highlights of Key Trends:

- The recording of real property documents is continuing to increase due to record low interest rates and record high real property financing and refinancing. When compared to the first nine months of 2001, current activity has increased by 22% thus far in 2003. This volume is expected to continue through 2003 and well into 2004. Our clients expect and will receive speedy and error free real property recordings.
- Interest rates are a key indicator of the number of real property recordings our Office will process. Projections in this regard are not an exact science, however, some trend indicators are useful when projecting workload. The two most important factors affecting real estate prices are the economy and demographics. The economy goes up and down, but demographics, particularly the baby-boomer generation, just keep rolling along.
- The major Clerk functions in the Office are Fictitious Business Name (FBN) Filings, issuance of marriage licenses and birth, death, and marriage certified copies. These operations increase approximately 5% annually. The economy has prompted the opening of new businesses, thus increasing FBN activity. The issuance of marriage licenses and performing civil marriage ceremonies continues at a steady pace in Orange County. The need for certified copies of birth, death and marriage certificates is on the rise, especially with schools requiring birth certificates prior to enrollment and children's sporting activities record requirements.

### Budget Units Under Agency Control

No.	Agency Name	County Clerk-Recorder	Recorder Functions	Clerk Functions	Information Services	Financial Services	Total
059	Clerk-Recorder	3,116,339	2,724,498	1,613,317	1,835,690	448,879	9,738,723
	Total	3,116,339	2,724,498	1,613,317	1,835,690	448,879	9,738,723