

059 - CLERK-RECORDER

Operational Summary

Mission:

The Clerk-Recorder Department's mission is to provide a 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 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 | 2005 Business Plan | 2006 Business Plan | How are we doing? |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Results | Target | |
| CONTINUE CUSTOMER SATISFACTION SURVEYS WHICH RATE OVERALL VALUE OF OUR SERVICE TO THE PUBLIC. What: Survey forms measure customer satisfaction and ensure we are addressing customer needs. Why: Quality customer service is our top priority. | Survey results are 99% above standard. | Survey results are targeted to be at least 99% above standard. | The Orange County Clerk-Recorder Department provides the highest level of service at the lowest cost-per-service unit of any major county in California. |
| THE NUMBER OF DOCUMENTS UTILIZING ELECTRONIC RECORDING. What: This measurement provides higher levels of transactions with minimal staffing increases. Why: Public has access to recorded documents within short timeframes. | 367,441 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. |
| NUMBER OF RECORDS CONVERTED TO ALTERNATE MEDIA TO ENSURE EASE OF ACCESS AND PRESERVATION AND SAFETY. What: This measurement is a tool to evaluate efforts to provide access and safeguard the public's records. Why: To provide added security to public records now and for future retrieval. | 4 million recordable/vital record images transferred from microfilm to digitized images. | Over 10 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. |

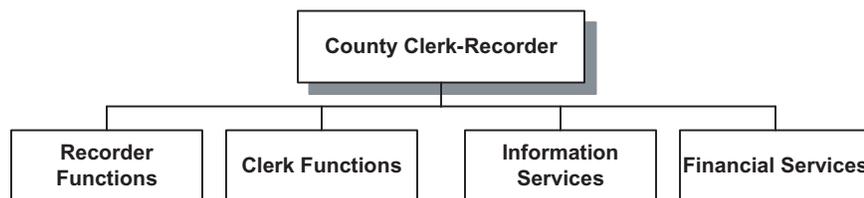
At a Glance:

| | |
|-----------------------------------------------|------------|
| Total FY 2005-2006 Projected Expend + Encumb: | 8,232,916 |
| Total Recommended FY 2006-2007 | 11,245,893 |
| Percent of County General Fund: | 0.38% |
| Total Employees: | 102.00 |

FY 2005-06 Key Project Accomplishments:

- The Clerk-Recorder Department opened a new South County branch office in the Laguna Hills Civic Center in February 2006 to better serve the growing customer base in the south Orange County Region.
- In 2006, the Clerk-Recorder department implemented a new telephone program. Our customers now have the opportunity to speak to a "live" person to assist them.
- The number of title and insurance companies, city and other government entities that record electronically has increased to 112 users.
- The total number of electronically recorded documents has exceeded 3 million since implementation in 1997.
- The Department converted approximately 95,000 official record images from microfilm to TIFF image.
- The Department converted approximately 2.5 million Grantor/Grantee records from microfilm to a digital format. This enhances and accelerates the retrieval, handling and processing time involved in locating a record from 20 minutes to five minutes.
- The Clerk-Recorder Department continues to serve an instrumental role in helping the California Attorney General's staff establish guidelines to certify Electronic Recording systems throughout the state.
- The department is on pace to surpass its record number of marriage ceremonies for FY 2005-2006.
- The Archives unit presented ten presentations to the Orange County Board of Supervisors on a variety of topics, including the history of various Orange County cities, the history of the county, Disneyland's 50th Anniversary and the 100th Birthday of the Orange County Register.
- The Archives unit also prepared and displayed the following two collections: The Orange County Civic Center - Past and Present, which tells the story of the development of the Civic Center, and the Orange County Archives, which included a general overview of our entire collection.

Organizational Summary



County Clerk-Administration - 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 recording 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 ability to record, recording and indexing documents, and optically imaging all recorded documents for storage and retrieval.

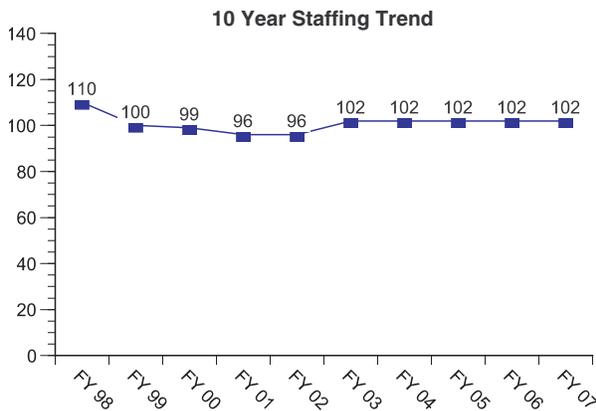
Clerk Functions - This division is responsible for issuing marriage licenses and performing civil wedding ceremonies. It also registers Notary Publics, Process Servers, Professional Photocopiers, and Unlawful Detainer Assistants; files documents related to Fictitious Business Name registrations and

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; and payroll.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- No new positions were added in FY 2005-2006.

Budget Summary

Plan for Support of the County's Strategic Priorities:

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



Proposed Budget History:

| Sources and Uses | FY 2004-2005 | FY 2005-2006 | FY 2005-2006 | FY 2006-2007 | Change from FY 2005-2006 | |
|--------------------|--------------|-------------------------|----------------------------------------|--------------|--------------------------|---------|
| | Actual | Budget As of 3/31/06 | Projected ⁽¹⁾ At 6/30/06 | Recommended | Projected Amount | Percent |
| Total Positions | 102 | 102 | 102 | 102 | 0 | 0.00 |
| Total Revenues | 16,651,885 | 16,777,091 | 15,899,665 | 17,496,309 | 1,596,644 | 10.04 |
| Total Requirements | 8,756,462 | 10,240,360 | 8,591,522 | 11,245,893 | 2,654,371 | 30.90 |
| Net County Cost | (7,895,423) | (6,536,731) | (7,308,143) | (6,250,416) | 1,057,727 | -14.47 |

(1) Requirements include prior year encumbrance and expenditures. Therefore, the above totals may not match FY 2005-06 projected requirements included in "At a Glance" (Which exclude these).

Columns may not total correctly due to rounding.

Detailed budget by expense category and by activity is presented for agency: Clerk-Recorder in the Appendix on page A67

Budget Units Under Agency Control:

| No. | Agency Name | County Clerk-Administration | Recorder Functions | Clerk Functions | Information Services | Financial Services | Total |
|-----|---------------------------------------|-----------------------------|--------------------|------------------|----------------------|--------------------|-------------------|
| 059 | Clerk-Recorder | 3,932,381 | 3,190,719 | 1,328,176 | 2,278,681 | 515,936 | 11,245,893 |
| 12D | Clerk Recorder's Special Revenue Fund | 5,813,944 | 0 | 0 | 0 | 0 | 5,813,944 |
| | Total | 9,746,325 | 3,190,719 | 1,328,176 | 2,278,681 | 515,936 | 17,059,837 |



059 - Clerk-Recorder

Summary of Proposed Budget by Revenue and Expense Category:

| Revenues/Appropriations | FY 2004-2005 | | FY 2005-2006 | | Change from FY 2005-2006 | |
|----------------------------------------|------------------------|-------------------------|--------------------------------------------------------|-----------------------------|--------------------------|----------------|
| | FY 2004-2005 Actual | Budget As of 3/31/06 | FY 2005-2006 Projected ⁽¹⁾ At 6/30/06 | FY 2006-2007 Recommended | Projected Amount | Percent |
| Taxes | \$ 644 | \$ 0 | \$ 0 | \$ 0 | \$ 0 | 0.00% |
| Licenses, Permits & Franchises | 517,771 | 485,000 | 418,784 | 485,000 | 66,216 | 15.81 |
| Revenue from Use of Money and Property | 2,600 | 0 | 0 | 0 | 0 | 0.00 |
| Charges For Services | 16,123,915 | 14,774,776 | 14,250,133 | 13,862,812 | (387,321) | -2.72 |
| Miscellaneous Revenues | 6,955 | 6,000 | 5,748 | 8,746 | 2,998 | 52.16 |
| Other Financing Sources | 0 | 1,511,315 | 1,225,000 | 3,139,751 | 1,914,751 | 156.31 |
| Total Revenues | 16,651,885 | 16,777,091 | 15,899,665 | 17,496,309 | 1,596,644 | 10.04 |
| Salaries & Benefits | 6,091,318 | 6,333,489 | 6,191,863 | 6,745,456 | 553,593 | 8.94 |
| Services & Supplies | 1,850,692 | 3,515,984 | 2,004,127 | 4,109,550 | 2,105,423 | 105.05 |
| Fixed Assets | 924,359 | 504,350 | 509,081 | 504,350 | (4,731) | -0.93 |
| Intrafund Transfers | (109,908) | (113,463) | (113,549) | (113,463) | 86 | -0.08 |
| Total Requirements | 8,756,462 | 10,240,360 | 8,591,522 | 11,245,893 | 2,654,371 | 30.90 |
| Net County Cost | \$ (7,895,423) | \$ (6,536,731) | \$ (7,308,143) | \$ (6,250,416) | \$ 1,057,727 | -14.47% |

(1) Requirements include prior year encumbrance and expenditures. Therefore, the above totals may not match FY 2005-06 projected requirements included in "At a Glance" (Which exclude these).

Columns may not total correctly due to rounding.

Proposed Budget Summary of County Clerk-Administration:

| Revenues/Appropriations | FY 2004-2005 | | FY 2005-2006 | | Change from FY 2005-2006 | |
|----------------------------------------|------------------------|-------------------------|--------------------------------------------------------|-----------------------------|--------------------------|---------------|
| | FY 2004-2005 Actual | Budget As of 3/31/06 | FY 2005-2006 Projected ⁽¹⁾ At 6/30/06 | FY 2006-2007 Recommended | Projected Amount | Percent |
| Taxes | \$ 644 | \$ 0 | \$ 0 | \$ 0 | \$ 0 | 0.00% |
| Licenses, Permits & Franchises | 517,771 | 485,000 | 418,784 | 485,000 | 66,216 | 15.81 |
| Revenue from Use of Money and Property | 2,600 | 0 | 0 | 0 | 0 | 0.00 |
| Charges For Services | 15,565,800 | 14,126,608 | 14,250,133 | 13,214,644 | (1,035,489) | -7.27 |
| Miscellaneous Revenues | 6,955 | 6,000 | 5,748 | 8,746 | 2,998 | 52.16 |
| Other Financing Sources | 0 | 1,511,315 | 1,225,000 | 3,139,751 | 1,914,751 | 156.31 |
| Total Revenues | 16,093,770 | 16,128,923 | 15,899,665 | 16,848,141 | 948,476 | 5.97 |
| Salaries & Benefits | 945,498 | 1,065,127 | 976,994 | 1,076,476 | 99,482 | 10.18 |
| Services & Supplies | 1,276,156 | 2,316,559 | 1,630,193 | 2,619,368 | 989,175 | 60.68 |
| Fixed Assets | 7,968 | 350,000 | 51,163 | 350,000 | 298,837 | 584.09 |
| Intrafund Transfers | (109,908) | (113,463) | (113,549) | (113,463) | 86 | -0.08 |
| Total Requirements | 2,119,714 | 3,618,223 | 2,544,800 | 3,932,381 | 1,387,581 | 54.53 |
| Net County Cost | \$ (13,974,056) | \$ (12,510,700) | \$ (13,354,865) | \$ (12,915,760) | \$ 439,105 | -3.29% |

Proposed Budget Summary of Recorder Functions:

| Revenues/Appropriations | FY 2004-2005 | FY 2005-2006 | FY 2005-2006 | FY 2006-2007 | Change from FY 2005-2006 | |
|---------------------------|--------------|-------------------------|----------------------------------------|--------------|--------------------------|---------|
| | Actual | Budget As of 3/31/06 | Projected ⁽¹⁾ At 6/30/06 | Recommended | Projected Amount | Percent |
| Charges For Services | \$ 0 | \$ 648,168 | \$ 0 | \$ 648,168 | \$ 648,168 | 0.00% |
| Total Revenues | 0 | 648,168 | 0 | 648,168 | 648,168 | 0.00 |
| Salaries & Benefits | 2,850,866 | 2,971,552 | 2,866,927 | 3,190,719 | 323,792 | 11.29 |
| Services & Supplies | 5,309 | 0 | 2,434 | 0 | (2,434) | -100.00 |
| Total Requirements | 2,856,175 | 2,971,552 | 2,869,361 | 3,190,719 | 321,358 | 11.20 |
| Net County Cost | \$ 2,856,175 | \$ 2,323,384 | \$ 2,869,361 | \$ 2,542,551 | \$ (326,810) | -11.39% |

Proposed Budget Summary of Clerk Functions:

| Revenues/Appropriations | FY 2004-2005 | FY 2005-2006 | FY 2005-2006 | FY 2006-2007 | Change from FY 2005-2006 | |
|---------------------------|--------------|-------------------------|----------------------------------------|--------------|--------------------------|---------|
| | Actual | Budget As of 3/31/06 | Projected ⁽¹⁾ At 6/30/06 | Recommended | Projected Amount | Percent |
| Salaries & Benefits | \$ 1,228,887 | \$ 1,229,195 | \$ 1,229,554 | \$ 1,328,176 | \$ 98,622 | 8.02% |
| Services & Supplies | 40,470 | 0 | 46,085 | 0 | (46,085) | -100.00 |
| Fixed Assets | 0 | 0 | 28,554 | 0 | (28,554) | -100.00 |
| Total Requirements | 1,269,357 | 1,229,195 | 1,304,193 | 1,328,176 | 23,983 | 1.84 |
| Net County Cost | \$ 1,269,357 | \$ 1,229,195 | \$ 1,304,193 | \$ 1,328,176 | \$ 23,983 | 1.84% |

Proposed Budget Summary of Information Services:

| Revenues/Appropriations | FY 2004-2005 | FY 2005-2006 | FY 2005-2006 | FY 2006-2007 | Change from FY 2005-2006 | |
|---------------------------|--------------|-------------------------|----------------------------------------|--------------|--------------------------|---------|
| | Actual | Budget As of 3/31/06 | Projected ⁽¹⁾ At 6/30/06 | Recommended | Projected Amount | Percent |
| Charges For Services | \$ 558,115 | \$ 0 | \$ 0 | \$ 0 | \$ 0 | 0.00% |
| Total Revenues | 558,115 | 0 | 0 | 0 | 0 | 0.00 |
| Salaries & Benefits | 585,634 | 585,910 | 631,894 | 637,149 | 5,255 | 0.83 |
| Services & Supplies | 528,269 | 1,196,425 | 320,183 | 1,487,182 | 1,166,999 | 364.48 |
| Fixed Assets | 916,391 | 154,350 | 429,364 | 154,350 | (275,014) | -64.05 |
| Total Requirements | 2,030,294 | 1,936,685 | 1,381,441 | 2,278,681 | 897,240 | 64.95 |
| Net County Cost | \$ 1,472,179 | \$ 1,936,685 | \$ 1,381,441 | \$ 2,278,681 | \$ 897,240 | 64.95% |



Proposed Budget Summary of Financial Services:

| Revenues/Appropriations | FY 2004-2005 | | FY 2005-2006 | | FY 2005-2006 | | Change from FY 2005-2006 | |
|---------------------------|--------------|------------|---------------|--------------------------|--------------|-------------|--------------------------|---------|
| | Actual | Budget | As of 3/31/06 | Projected ⁽¹⁾ | At 6/30/06 | Recommended | Projected | Percent |
| Salaries & Benefits | \$ 480,434 | \$ 481,705 | \$ 481,705 | \$ 486,494 | \$ 486,494 | \$ 512,936 | \$ 26,442 | 5.44% |
| Services & Supplies | 487 | 3,000 | 3,000 | 5,232 | 5,232 | 3,000 | (2,232) | -42.66 |
| Total Requirements | 480,921 | 484,705 | 484,705 | 491,726 | 491,726 | 515,936 | 24,210 | 4.92 |
| Net County Cost | \$ 480,921 | \$ 484,705 | \$ 484,705 | \$ 491,726 | \$ 491,726 | \$ 515,936 | \$ 24,210 | 4.92% |