

**COUNTY OF SONOMA
AGENDA ITEM
SUMMARY REPORT**

Clerk of the Board Use Only
Meeting Date **Held Until**
 / / / /
Agenda Item No: **Agenda Item No:**

Department: County Clerk/Recorder/Assessor

() **4/5 Vote Required**

Contact:
Stephen Lehmann

Phone:
(707) 565-3246

Board Date:
June 2, 2009

Deadline for Board Action:
June 2, 2009

AGENDA SHORT TITLE:
Recorder's Official Records Social Security Number Truncation Project

REQUESTED BOARD ACTION:

Authorize the County Clerk/Recorder/Assessor to approve an agreement with Computing System Innovations (CSI) to review and truncate social security numbers from the Recorder's official records dating from 1980 through 2008.

CURRENT FISCAL YEAR FINANCIAL IMPACT

EXPENDITURES

ADD'L FUNDS REQUIRING BOARD

Estimated Cost \$ 97,500

Contingencies \$
(Fund Name:)

Amount Budgeted \$ 97,500

Unanticipated Revenue \$
(Source:)

Other Avail Approp. \$
(Explain below)

Other Transfer(s) \$
(Source:)

Additional Requested: \$ 0.00

Add'l Funds Requested: \$

Explanation (if required): The total contract cost is for \$292,500 to be paid over three years. Funds are appropriated in the Recorder's Social Security Truncation special revenue fund.

Prior Board Action(s):

12/11/07: Resolution 07-1038 adopting a \$1.00 fee for recording the first page of every instrument to support the implementation and ongoing operation of the social security number truncation program.

Alternatives - Results of Non-Approval:

The back-file redaction of social security numbers in the official records, from 1980 to 2008, would not take place as required by Assembly Bill 1168.

Background:

Responding to the risk of identity theft, the California Legislature passed AB 1168 in 2007. This legislation requires County Recorders to redact the first five digits of any social security number contained in the official records from January 1, 1980 through the present. On January 1, 2008 the Sonoma County Recorder began manually redacting social security numbers from all official records. In January 2009, the Recorder began using an automated method integrated into the "Anthem" operating system on a go forward basis. This procedure cannot accomplish the back file redaction of the prior year images.

The images from 1980 through 2008 number approximately 15 million. The Recorder and the Purchasing Division solicited bids from eleven qualified vendors to provide for the extraction of these images from the Recorder's data base, redaction of the first five digits of any social security number and the integration of the redacted images back into the Recorder's data base. The Recorder is including records from 2008 as a double check and review of the process conducted manually during 2008. Eight proposals were received and reviewed by staff from the County Clerk/Recorder/Assessor and Information Services and the proposals were ranked as follows:

- | | |
|---------------------------------|--------------------------------|
| 1. Computing System Innovations | 5. Aptitude Solutions |
| 2. ATPAC | 6. SOUTHTECH Systems |
| 3. Manatron | 7. Document Technology Systems |
| 4. IKON Office Solutions, Inc. | 8. RecordFusion |

Computing System Innovations was ranked number one in the selection process. Their price per image was slightly higher than the second place proposal but their depth of experience and track record of accuracy and pricing structure (complete the entire job in the first six months and spread the payments over a three year period at no interest) more than offset the price difference. The company has performed the identical services requested for counties using the exact same operating system used by the Sonoma County Recorder and has redacted 1.4 billion images.

The Board approved a resolution in December 2007 adopting a \$1.00 fee for recording the first page of each document designated for the implementation and operation of the social security number truncation program. Sufficient appropriations for this project are budgeted in the Social Security Truncation Program fund.

Requested Board Action:

Authorize the County Clerk/Recorder/Assessor to approve an agreement with Computing System Innovations for social security number truncation.

Attachments:

On File With Clerk: Agreement for Truncation of Social Security Numbers from Official Records

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