

**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:**  
Vicki Petersen

**Phone:**  
(707) 565-2583

**Board Date:**  
09/29/2009

**Deadline for Board Action:**  
09/29/2009

**AGENDA SHORT TITLE:**                      Agreement for County Clerk filing system upgrade

**REQUESTED BOARD ACTION:** Authorize the County Clerk/Recorder/Assessor to approve an Agreement with SouthTech, Inc. to upgrade the ClerkDocs System.

**CURRENT FISCAL YEAR FINANCIAL IMPACT**

**EXPENDITURES**

**ADD'L FUNDS REQUIRING BOARD**

**Estimated Cost**                      \$            110,829.96

**Contingencies**                      \$  
(Fund Name:)

**Amount Budgeted**                      \$            110,829.96

**Unanticipated Revenue**                      \$  
(Source:)

**Other Avail Approp.**                      \$  
(Explain below)

**Other Transfer(s)**                      \$  
(Source:)

**Additional Requested:**                      \$            0.00

**Add'l Funds Requested:**                      \$

**Explanation (if required):**                      Funds for project costs are available in the approved 2009/10 budget

**Prior Board Action(s):**

9/11/07 – Agreement for County Clerk system upgrade and maintenance.

**Alternatives - Results of Non-Approval:**

The County Clerk’s office will not be able to further improve services to the public by offering online application systems, and realize salary savings through improved efficiencies.

**Background:**

The County Clerk's office has used SouthTech's system (CATS) for processing marriage license applications since 1995, and upgraded to SouthTech's (ClerkDocs) system in 2003. An Online Marriage License application allowing customers to use the web-based system for online entry of marriage license data was approved by the Board of Supervisors in 2007 and added in 2008. The ClerkDocs system has additional modules and online systems available for processing all types of filings and documents handled by the County Clerk's office.

In order to meet budgetary constraints and in line with the County's long-term strategic plan to make the most efficient and effective use of current resources, the County Clerk will be able to realize and sustain salary savings in FY 09/10 of approximately \$36,000 and in the future by expanding the functions of the current ClerkDocs system. The proposed upgrade will add modules for professional registrations and miscellaneous filings handled by the Clerk's office including Notary Public, Process Server, Legal Document Assistant, Unlawful Detainer Assistant, Professional PhotoCopier Registrations, and Environmental Impact Report filings. The professional registration modules will handle all registrations and renewals. Each type of registration or filing process will be streamlined from a manual, paper based process, requiring staff to reference many different systems and files, including paper files to a single system with document image capture, storage and retrieval, as well as the option of online application forms, that will reduce the time required for data entry. This will expedite processing applications, issuing identification cards, registration and filings, searching existing registrations, processing modifications, tracking expiration dates, generating expiration letters and processing renewals. The online modules for professional registration and miscellaneous filings will further improve services to the public and reduce time requirements for data entry. It is estimated that these upgrades will reduce the staff time requirements by approximately 0.5 FTE (\$36,000).

Funding for the ClerkDocs system upgrade, generated by existing service fees and anticipated salary savings, has been approved in County Clerk's FY 2009/10 budget.

**Recommendation:**

Authorize the County Clerk/Recorder/Assessor to execute an agreement with SouthTech, Inc. to upgrade the ClerkDocs system, installing modules for processing professional registrations and miscellaneous filings.

**Attachments:**

**On File With Clerk:** Agreement for ClerkDocs System Upgrade and Maintenance

**CLERK OF THE BOARD USE ONLY****Board Action** (If other than "Requested")**Vote:**