

## Clerk & Recorder

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### Department Overview

The Clerk & Recorder is an Elected Official serving a four year term. The position was consolidated with the County Surveyor so the elected position is officially the County Clerk & Recorder / Surveyor. The Department is a part of the General Fund with a major portion of funding for the department coming from fees collected as allowed by state law.

The Clerk & Recorder is responsible for:

- Election activities dealing with all state, county, municipal, special district and special elections in the County;
- Document Recording and Indexing entails the maintenance of public records pertinent to lands and vital records;
- Clerk & Recorder is the Clerk to the Board of County Commissioners

The Surveyor portion of the Clerk & Recorder's job does not include staff positions. A stipend for the Surveyor duties is included in the Clerk & Recorder's salary.

The Clerk & Recorder acts as the County Election Administrator. State Law was amended to allow for additional compensation to be paid for Clerk & Recorders who act as the Election Administrator.

Records Preservation is a separate fund established by state law, with revenue generated by a fee charged for documents filed with the Clerk & Recorder. This fund is an integral part of the Clerk & Recorder's ability to maintain and protect the important documents on file within the office. Without this funding source, the ability to update records storage capabilities with new technologies would be hindered.

### Department Goals

See Activity pages for specific goals.

### Recent Accomplishments

See Activity pages for specific accomplishments.

# GENERAL GOVERNMENT

## Clerk & Recorder

### Department Budget

Object of Expenditure	Actual FY 2013	Final FY 2014	Actual FY 2014	Request FY 2015	Preliminary FY 2015	Final FY 2015
Personnel	\$ 665,326	\$ 689,790	\$ 674,924	\$ 693,061	\$ 714,654	\$ 717,435
Operations	459,679	498,911	434,121	468,152	468,152	463,663
Debt Service	-	-	-	-	-	-
Capital Outlay	20,391	125,000	75,000	87,000	87,000	87,000
Transfers Out	34,386	-	-	-	-	-
<b>Total</b>	<b>\$ 1,179,782</b>	<b>\$ 1,313,701</b>	<b>\$ 1,184,045</b>	<b>\$ 1,248,213</b>	<b>\$ 1,269,806</b>	<b>\$ 1,268,098</b>

#### Budget by Fund Group

General Fund	\$ 996,160	\$ 1,020,701	\$ 1,027,400	1,027,002	\$ 1,048,595	\$ 1,051,376
Special Revenue Funds	183,621	293,000	156,645	221,211	221,211	216,722
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
<b>Total</b>	<b>\$ 1,179,781</b>	<b>\$ 1,313,701</b>	<b>\$ 1,184,045</b>	<b>\$ 1,248,213</b>	<b>\$ 1,269,806</b>	<b>\$ 1,268,098</b>

#### Funding Sources

Tax Revenues	\$ 171,973	\$ 174,694	\$ 171,201	\$ 139,020	\$ 155,012	\$ 178,908
Non-Tax Revenues	275,027	958,761	865,652	959,693	895,931	937,537
Cash Reappropriated	732,781	180,245	147,192	149,500	218,863	151,653
<b>Total</b>	<b>\$ 1,179,781</b>	<b>\$ 1,313,700</b>	<b>\$ 1,184,045</b>	<b>\$ 1,248,213</b>	<b>\$ 1,269,806</b>	<b>\$ 1,268,098</b>

### Department Personnel

No. of Positions	FT/PT	Title	FTE
See individual Activity			
Total Program			0

## Clerk & Recorder – Elections

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### Activity Overview

The Gallatin County Election Office is part of the Clerk and Recorder's Office in the General Fund, and is under the supervision of the Clerk & Recorder/ Surveyor. The Office does not generate a significant amount of non-tax revenue. When elections are held for political subdivisions other than the County, the expenses for conducting the election are reimbursed by that governing body.

The Election Office is responsible for elections held within the County. The staff maintains the voter registration database and election management software, and holds elections required by federal, state, and County government. The voter registration database is Gallatin County's portion of the statewide database known as Montana Votes. The office also conducts elections for the Cities and Towns of Belgrade, Bozeman, Manhattan, Three Forks, and West Yellowstone, and various special districts including fire, water/sewer, schools, and resort districts. In addition, the office provides election materials to the various school districts to assist them in performing their election duties.

Federal Laws regulating functions of the office include the National Voter Registration Act (NVRA) and the Help America Vote Act (HAVA). HAVA has been cited as the most significant election reform of federal election law since the Voting Rights Act of 1965.

### Activity Goals

- Successfully complete elections for:
  - 13 Water & Sewer Districts
  - 14 Rural Fire Districts
  - 16 School Districts
  - 5 Municipalities
  - and any special elections that may arise.
- Mail 65,000 reminder notices about precinct and polling place changes due to redistricting.
- Continue to increase the number of voters who vote by mail.
- Continue to cross train employees between the recording and election offices.

### Recent Accomplishments

- Conducted 5 Municipal elections in November.
- Conducted a countywide election for Gallatin College.
- Conducted a recall election with a recount for the Bridger Canyon Rural Fire District.
- Mailed approximately 25,000 annual absentee confirmation notices.
- Conducted the annual May school elections for all 16 school districts.
- Completed elections for the Hebgen Basin, Three Forks, and Central Valley Rural Fire Districts.
- Realigned precinct boundaries according to the Montana Legislative Reapportionment Committee maps.
- Wrote legal descriptions for new precinct boundaries.
- Conducted the June Federal Primary Election.

# GENERAL GOVERNMENT

## Clerk & Recorder – Elections

### Activity Budget

Object of Expenditure	Actual FY 2013	Final FY 2014	Actual FY 2014	Request FY 2015	Preliminary FY 2015	Final FY 2015
Personnel	\$ 177,075	\$ 169,218	\$ 152,322	\$ 170,459	\$ 172,721	\$ 262,521
Operations	258,925	252,661	272,615	254,753	254,753	254,753
Debt Service	-	-	-	-	-	-
Capital Outlay	-	-	-	-	-	-
Transfers Out	-	-	-	-	-	-
<b>Total</b>	<b>\$ 436,000</b>	<b>\$ 421,879</b>	<b>\$ 424,937</b>	<b>\$ 425,212</b>	<b>\$ 427,474</b>	<b>\$ 517,274</b>

### Budget by Fund Group

General Fund	\$ 436,000	\$ 421,879	\$ 424,937	\$ 425,212	\$ 427,474	\$ 517,274
Special Revenue Funds	-	-	-	-	-	-
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
<b>Total</b>	<b>\$ 436,000</b>	<b>\$ 421,879</b>	<b>\$ 424,937</b>	<b>\$ 425,212</b>	<b>\$ 427,474</b>	<b>\$ 517,274</b>

### Funding Sources

Tax Revenues	\$ 199,005	\$ 223,064	\$ 218,603	\$ 237,230	\$ 240,209	\$ 264,105
Non-Tax Revenues	123,464	123,570	123,570	129,693	120,255	107,537
Cash Reappropriated	113,531	75,245	82,764	58,289	67,010	145,632
<b>Total</b>	<b>\$ 436,000</b>	<b>\$ 421,879</b>	<b>\$ 424,937</b>	<b>\$ 425,212</b>	<b>\$ 427,474</b>	<b>\$ 517,274</b>

### Activity Personnel

No. of Positions	FT/PT	Title	FTE 2013	FTE 2014	FTE 2015
1	Full-Time	Clerk and Recorder	1.00	1.00	1.00
1	Full-Time	Supervisor	0.00	0.00	0.50
1	Full-Time	Lead Administrative Clerk	0.00	1.00	0.50
2	Full-Time	Administrative Clerk	3.00	1.75	1.75
5		Total Program	3.00	2.75	3.75

\*Lead Administrative Clerk to be promoted to Supervisor halfway through the year, if authorized, moved Clerk & Recorder from Records.

## Clerk & Recorder – Elections

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### 2015 Budget Highlights

#### Personnel

- Moved Clerk & Recorder from Records and reclassification of Lead Admin Clerk to Election Supervisor as of January 1, 2015; hire a full time clerk for a vacant position; hire 20 temporary employees to help support the November Federal General Election

#### Operations

- Lease payment for the new 850 ballot scanner \$11,818.85 for remaining 4 years
- Ballot on Demand ballot printer and folder lease

#### Capital

- No expected purchases for the next fiscal year

### County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the goals, followed by the methods by which the Department is striving to fulfill those goals.

#### Align community needs with budgetary decisions

- Reduce the cost of each election by streamlining the processes to provide cost effective elections.

#### Adhere to long-term plans

- Update election equipment for faster, more efficient, less costly election results reporting.

#### Demonstrate exceptional Customer Service

- Accurate Election information easily accessible to the public.
- Respond to inquiries in a customer friendly manner.

#### Serve as a Model for Excellence in Government

- Timely response to election queries.
- Retain the integrity of the election process.

#### Improve communication within county government, other jurisdictions and our public

- Interdepartmental Communication.
- Improve access to public information (information on website and media blitz).

#### Be an Employer of Choice and improve employee retention

- A pleasant, respectful work environment.

Clerk & Recorder – Elections

Workload Indicators / Performance Measures

<b>Workload Indicators</b>		<b>Actual</b>	<b>Actual</b>	<b>Actual</b>	<b>Projected</b>
<b>Indicator</b>		<b>FY 2012</b>	<b>FY 2013</b>	<b>FY 2014</b>	<b>FY 2015</b>
1.	Number of voter applications processed	8,000	16,000	32,088	20,000
2.	Number of confirmation cards issued to voters	10,000	16,000	101,745	68,400
3.	Trained election judges	238	0	275	0
4.	Number of ballots mailed	97,350	60,000	114,000	80,000
5.	Number of signatures verified	45,000	50,292	56,500	50,000
6.	Conduct successful elections	18	18	31	21
7.	Annual Confirmation Cards mailed	40,600	32,971	23,500	30,000
8.	NVRA Cards Mailed	0	7,525	0	7,000
9.	Undeliverable ballot notices mailed	2,829	5,211	7,160	5,000
10.	Number of petition signatures verified		12,282	1,200	10,000

<b>Performance Measures</b>		<b>Actual</b>	<b>Actual</b>	<b>Actual</b>	<b>Projected</b>
		<b>FY 2012</b>	<b>FY 2013</b>	<b>FY 2014</b>	<b>FY 2015</b>
1.	% of voter registration applications processed within 30 days	100%	85%	95%	90%
2.	% of confirmation cards mailed weekly	90%	79%	40%	90%
3.	% of undeliverable ballots returned	2.91%	5.79%	6.28%	5.0%

**Comments**

## Clerk & Recorder – Records

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### Activity Overview

By Montana Law, the Clerk & Recorder's Office is responsible for the recording, indexing, and safe keeping of land, County and birth / death documents. The office is also responsible for the recording and maintenance of minutes for the County Commission.

Fees collected by the Clerk and Recorder - Recording Department generate a net income to the County General Fund and the Records Preservation Fund, as shown in the budget information on the next page. These revenues offset some of the costs associated with the other Clerk & Recorder activity (Elections). As the economic climate of Gallatin County has improved, the Records Department is a department where the revenues have increased significantly over the past two years. Foot traffic in the office has only increased moderately as much of the business of the office is now done electronically for both receiving new documents and issuing copies of documents for the public.

The first priority is to help the public find the records that they need. It is the goal to do this in an efficient manner that relies on technology and knowledgeable, helpful staff. The time that it takes to process documents is also key to good service in the Recording Department. Records need to be accurate and as up to date as possible.

Records are currently in several different formats, including paper, microfilm and digital images. The Department has completed the process of converting the older formats into the newer and more convenient and accessible digital format. However, getting the digital images into a retrievable database is a long-term project that will take years to complete.

Another duty of the Clerk & Recorder's Office is to provide certified searches of the records. Commonly, these include Uniform Commercial Code filings, Liens and other various real estate documents. This duty has decreased with the availability of County records online for customers to perform their own searches.

Other types of documents that the Clerk & Recorder maintains are the supporting documentation of the County Commission actions. This includes Resolutions, Ordinances and Contracts that must be indexed and copied and distributed accurately. These records are available to the public online at no charge via Tyler Content Manager.

### Activity Goals

- Maintain under one-week turn-around time for returning documents to customers most of the time.
- Improve public access to records through electronic media (website, road petition database and vitals database).
- Assist customers in finding requested records in an efficient and helpful manner.

### Recent Accomplishments

- Maintained a one week or less turn-around time for returning documents 64% of the time.
- Continued public access to certain records through electronic media.
- Mailed approximately 5,666 tax notices to RID Maintenance owners.
- Continued monthly staff meetings to improve departmental communication.
- Entered 11,534 historical documents in EagleRecorder from 1986-87.
- Reviewed 21 surveys & documents showing a division of land that had no review through Planning.
- Provided EagleWeb access to Real Estate records for the public via our website. This generated nearly \$19,000 in credit card transactions for online customers to purchase images of documents.
- Recorded 5,148 electronic documents in EagleRecorder using the Quickdocs e-recording module.
- Added three more electronic document filers Indecomm, eRecording Partners Network and Nationwide Title Clearing.

# GENERAL GOVERNMENT

## Clerk & Recorder – Records

### Activity Budget

Object of Expenditure	Actual FY 2013	Final FY 2014	Actual FY 2014	Request FY 2015	Preliminary FY 2015	Final FY 2015
Personnel	\$ 488,251	\$ 520,572	\$ 498,793	\$ 522,602	\$ 541,933	\$ 454,914
Operations	71,909	78,250	65,956	79,188	79,188	79,188
Debt Service	-	-	-	-	-	-
Capital Outlay	-	-	-	-	-	-
Transfers Out	-	-	-	-	-	-
<b>Total</b>	<b>\$ 560,160</b>	<b>\$ 598,822</b>	<b>\$ 564,749</b>	<b>\$ 601,790</b>	<b>\$ 621,121</b>	<b>\$ 534,102</b>

#### Budget by Fund Group

General Fund	\$ 560,160	\$ 598,822	\$ 564,749	\$ 601,790	\$ 621,121	\$ 534,102
Special Revenue Funds	-	-	-	-	-	-
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
<b>Total</b>	<b>\$ 560,160</b>	<b>\$ 598,822</b>	<b>\$ 564,749</b>	<b>\$ 601,790</b>	<b>\$ 621,121</b>	<b>\$ 534,102</b>

#### Funding Sources

Tax Revenues	\$ (27,032)	\$ (48,369)	\$ (47,402)	\$ (98,210)	\$ (24,556)	\$ (85,197)
Non-Tax Revenues	587,192	647,191	612,151	700,000	645,677	700,000
Cash Reappropriated	-	-	-	-	-	(80,701)
<b>Total</b>	<b>\$ 560,160</b>	<b>\$ 598,822</b>	<b>\$ 564,749</b>	<b>\$ 601,790</b>	<b>\$ 621,121</b>	<b>\$ 534,102</b>

### Activity Personnel

No. of Positions	FT/PT	Title	FTE 2013	FTE 2014	FTE 2015
1	Full-Time	Elected Clerk & Recorder/Supervisor	1.00	1.00	1.00
1	Full-Time	Recording Supervisor	1.00	1.00	1.00
1	Full-Time	GIS Technician	1.00	1.00	1.00
6	Full-Time	Support Staff	6.00	6.00	6.00
1	Part-time	Support Staff	0.75	0.75	0.75
10.00		Total Program	9.75	9.75	9.75

Clerk & Recorder – Records

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2015 Budget Highlights

Personnel

- Moved Clerk and Recorder from Records into Elections

Operations

- Operations costs increase with fixed costs only

Capital

- No capital requests from General Fund – see Records Preservation Fund for approved capital

County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the goals, followed by the methods by which the Records department is striving to fulfill those goals.

Align community needs with budgetary decisions

- Make all capital purchases through the Records Preservation Fund.
- Maintain level of Operations spending through efficiency while seeing increasing recording volumes.

Adhere to long-term plans

- Continue adding historic documents to the recorded document database.

Demonstrate exceptional Customer Service

- Knowledgeable, friendly, helpful staff.

Serve as a Model for Excellence in Government

- Clear, consistent, accurate, accessible records using the best technology available.
- Accurately account for all revenue.

Improve communication within county government, other jurisdictions and our public

- Internal Department communication.
- Communication with the public.
- Meet statutory requirements related to the recording of documents.
- Prepare long-term growth plan for the department.

Be an Employer of Choice and improve employee retention

- Staff has training opportunities available to them.

**Clerk & Recorder – Records**

**Workload Indicators / Performance Measures**

<b>Workload Indicators</b>		<b>Actual</b>	<b>Actual</b>	<b>Actual</b>	<b>Projected</b>
<b>Indicator</b>		<b>FY 2012</b>	<b>FY 2013</b>	<b>FY 2014</b>	<b>FY 2015</b>
1.	Documents filed/recorded	30,562	34,604	31,000	31,000
2.	Deeds recorded	4,525	5,620	5,704	5,600
3.	Plats/surveys filed	116	115	127	120
4.	New Condominium declarations recorded	8	12	5	4
5.	Total receipts	21,143	22,922	20,117	21,000
6.	Number of certified birth certificates issued	3,378	3,316	3,365	3,300
7.	Number of certified death certificates issued	5,434	5,754	5,366	5,600
8.	Minutes completed for County Commission meetings	50	50	50	50
9.	Historic Documents indexed	3,848	3,812	10,603	11,000
10.	Credit Card Transactions	1,014	1,039	1,093	1,100
11.	QuickDocs (electronic) Documents Recorded	5,088	5,155	5,030	5,150

<b>Performance Measures</b>		<b>Actual</b>	<b>Actual</b>	<b>Actual</b>	<b>Projected</b>
		<b>FY 2012</b>	<b>FY 2013</b>	<b>FY 2014</b>	<b>FY 2015</b>
1.	Process documents within 1 week of receipt	74%	52%	69%	70%
2.	% receipts completed without voids	98.7%	98.8%	98.8%	99%
3.	Commission minutes posted on website within 4 weeks	31%	75%	66%	90%
4.	Percent of Projected Historic Documents indexed			118%	100%
5.	Percent of transactions completed electronically (CC+QD)/receipts	24%	23%	24%	25%

**Comments**

## Clerk & Recorder – Records Preservation

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### Activity Overview

The Records Preservation Fund tracks revenues generated from a fee approved by the legislature for the Clerk and Recorder to maintain and preserve the records on file in the office.

The budget for the Records Preservation Fund has revenues that are reported and segregated in a separate fund. This fund allows the County to keep County records in a proper and professional manner. Expenses in this fund assist the Clerk and Recorder in preservation of records and provide services to customers through:

- Replacement of computers
- Maintenance of equipment and software
- Conversion of paper records to digital format
- Conversion of digital files to microfilm
- Repair and preservation of historical paper records
- Set aside funds for future records needs (shelving, cabinets, updates, equipment, off-site records storage and other records programs)

The Records Preservation Fund is used for operating and capital expenses.

### Activity Goals

- Improve public access to records through electronic media (website, road petition database and vitals database).
- Preserve birth and death records by placing them in clear non-reactive envelopes and storing them in binders.
- Preserve existing paper records for future use by the public.

### Recent Accomplishments

- Received significant revenues for the Records Preservation Fund.
- Converted digital images to microfilm for archival purposes of those documents recorded in the fiscal year.
- Preserved 5,800 birth and death records by placing them in clear non-reactive envelopes and storing them in 36 custom binders.
- Maintained EagleRecorder, Tyler Content Manager, and ESRI ArcGIS software.
- Maintained Xerox large format scanner/printer system.
- Expanded Spacesaver mobile shelving in basement vault.
- Purchased image upload utility to speed processing of historic documents in EagleRecorder.

# GENERAL GOVERNMENT

## Clerk & Recorder – Records Preservation

### Activity Budget

Object of Expenditure	Actual FY 2013	Final FY 2014	Actual FY 2014	Request FY 2015	Preliminary FY 2015	Final FY 2015
Personnel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operations	128,845	168,000	81,645	134,211	134,211	129,722
Debt Service	-	-	-	-	-	-
Capital Outlay	20,391	125,000	75,000	87,000	87,000	87,000
Transfers Out	34,386	-	-	-	-	-
<b>Total</b>	<b>\$ 183,622</b>	<b>\$ 293,000</b>	<b>\$ 156,645</b>	<b>\$ 221,211</b>	<b>\$ 221,211</b>	<b>\$ 216,722</b>

### Budget by Fund Group

General Fund	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Special Revenue Funds	183,621	293,000	156,645	221,211	221,211	216,722
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
<b>Total</b>	<b>\$ 183,621</b>	<b>\$ 293,000</b>	<b>\$ 156,645</b>	<b>\$ 221,211</b>	<b>\$ 221,211</b>	<b>\$ 216,722</b>

### Funding Sources

Tax Revenues	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Non-Tax Revenues	151,563	188,000	129,931	130,000	130,000	130,000
Cash Reappropriated	32,058	105,000	26,714	91,211	91,211	86,722
<b>Total</b>	<b>\$ 183,621</b>	<b>\$ 293,000</b>	<b>\$ 156,645</b>	<b>\$ 221,211</b>	<b>\$ 221,211</b>	<b>\$ 216,722</b>

### Activity Personnel

No. of Positions	FT/PT	Title	FTE
Staff is not funded in this activity			
Total Program			0

Clerk & Recorder – Records Preservation

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2015 Budget Highlights

Personnel

- No personnel in the Records Preservation budget

Operations

- Birth and Death record preservation project

Capital

- Auto Indexing Module \$20,000, Office renovation \$44,500, File Cabinets \$5,000, Computer Replacement \$7,500, Printer \$5,000, Scanner \$5,000

County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the goals, followed by the methods by which the Department is striving to fulfill those goals.

Align community needs with budgetary decisions

- Rearrange Recording office to more effectively and efficiently assist the public.

Adhere to long-term goals

- Maintain Eagle Recorder and Content Manager software that stores permanent records for the public.
- Create greater paper record storage efficiency by purchasing mobile shelving system.

Demonstrate exceptional Customer Service

- Knowledgeable, friendly, helpful staff.
- Accessibility of land information.

Serve as a Model for Excellence in Government

- Clear, consistent, accurate, accessible records using the best technology available.
- Accurately account for all revenue.

Improve communication within county government, other jurisdictions and our public

- Internal Department communication.
- Communication with the public.
- Meet statutory requirements related to the recording of documents.

Be an Employer of Choice and improve employee retention

- Provide training opportunities to staff.

Clerk & Recorder – Records Preservation

Workload Indicators / Performance Measures

<b>Workload Indicators</b>				
<b>Indicator</b>	<b>Actual FY 2012</b>	<b>Actual FY 2013</b>	<b>Estimate FY 2014</b>	<b>Projected FY 2015</b>
1. Record preservation revenue collected	\$155,110	\$166,134	\$129,931	\$130,000
2. Converted digital records to microfilm	120,000	148,065	126,683	120,000
3. Archive and bind Birth and Death Certificates	5,400	5,400	5,800	5,400

  

<b>Performance Measures</b>				
<b>Measure</b>	<b>Actual FY 2012</b>	<b>Actual FY 2013</b>	<b>Actual FY 2014</b>	<b>Projected FY 2015</b>
1. Purchased all computers budgeted for on schedule	3	13	3	7
2. Purchased binders and bind historic ½sheet birth and death cdfs	100%	100%	100%	100%

  

<b>Comments</b>				