



MEMORANDUM
OFFICE OF THE
PLACER COUNTY CLERK – RECORDER –
REGISTRAR OF VOTERS

TO: Honorable Board of Supervisors
FROM: Jim McCauley, Placer County Clerk–Recorder–Registrar of Voters
DATE: March 8, 2011
SUBJECT: Approve the Placer County Clerk–Recorder–Registrar of Voters to Contract with SouthTech Systems, Inc. for Upgrade of the Clerk-Recorder's Current Conflict-of-Interest Disclosure Filing System in an Amount Not to Exceed \$37,750 to be Fully Reimbursed from Recorder Trust Funds

Jim McCauley

Recommendation

Approve the Placer County Clerk–Recorder–Registrar of Voters to contract with SouthTech Systems, Inc. for upgrade of the Clerk-Recorder's current conflict-of-interest disclosure filing software in an amount not to exceed \$37,750 for the additional software licensing costs and upgrade/conversion services, to be fully funded from Recorder Trust Funds.

Background

The Placer County Clerk–Recorder–Registrar of Voters is required to manage and maintain the Fair Political Practices Commission (FPPC) candidate/campaign financial disclosure statements and public official statements of economic interest (Form 700's) for required filers within the County. Currently, this entails tracking approximately 1,200 annual, assuming and leaving office statements for public officials plus numerous candidate/campaign disclosure statement filings. The filing processes entail considerable staff effort for tracking, contacting public agencies and filers, scanning and filing statements, etc. on the part of County Clerk–Recorder–Registrar of Voters staff and other departments and filing agencies. In November 2007, the Board of Supervisors authorized purchase of the CampaignDocs™ and DisclosureDocs™ from SouthTech Systems, Inc. of California to begin automating the political and candidate campaign and public official disclosure filings. The software is used by several other California counties and has been specifically designed for managing California's FPPC documents and filing requirements and supporting imaging and public accessibility, including through website access.

SouthTech recently upgraded its DisclosureDocs™ product to incorporate eDisclosure™ and provide a much more automated and easier forms completion process for filers and enhanced management of the filing process for filing agencies. eDisclosure™ integrates with the existing DisclosureDocs™ system and should save filers a minimum of 30 to 60 minutes or more annually, through copying of information from prior year's filings and within each year's filings (similar to popular tax filing software products), and will increase filers' completion accuracy through automatic edits for required items and errors (again, similar to tax filing software products), plus provide more automated information tracking and reporting for the County and enhanced communication with all filers. eDisclosure™ will also facilitate future online filings with the Fair Political Practices Commission, should that option eventually become available.

Fiscal Impact

Approving this request will result in increased, one-time costs of \$37,750 for the eDisclosure™ software license and upgrade/conversion implementation services required. However, these increased one-time costs can be absorbed within the Office's existing FY 2010-11 Budget due to budget savings in the Clerk-Recorder's operations and will also be fully reimbursed from Clerk-Recorder's Trust Funds. Annual system maintenance costs for the upgraded system will increase by \$4,839, but are also fully trust fund reimbursable, and have been included in the Clerk-Recorder's FY 2011-12 Requested Budget accordingly.

It is also conservatively estimated, as indicated in the previous section of this memo, that use of the upgraded and integrated DisclosureDocs™/eDisclosure™ system will save filers a minimum of 30 to 60 minutes or more annually – a total of between 600 and 1,200 hours annually – in time required for filer form completion and additionally, the upgraded system will further reduce filing agency staff time required for management and maintenance of the disclosure filing processes and documents.