



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: November 6, 2007
SUBJECT: Approve the Placer County Clerk–Recorder–Registrar of Voters to Contract with SouthTech Systems, Inc. for Acquisition and Implementation of Software to Provide Campaign and Disclosure Document Management, Tracking and Web Publishing/ Public Viewing Access in an Amount Not to Exceed \$85,990; Authorize Additional Equipment, System Maintenance and Support Costs; Approve Budget Revision for Reimbursement of \$70,305 in Increased Costs from Recorder Trusts, and Add All Project Acquisition Costs to the Master Fixed Asset List.

Recommendation

Approve the Placer County Clerk–Recorder–Registrar of Voters to contract with SouthTech Systems, Inc. for acquisition and implementation of software to provide campaign and disclosure document management, tracking and web publishing/ public viewing access in an amount not to exceed \$85,990 plus authorize additional costs for necessary computer equipment (\$16,600), annual system maintenance (\$10,740) and telecommunications costs (\$9,600 plus installation) for FY 2007-08; approve a budget revision for reimbursement of \$70,305 in increased costs from Recorder Trust Funds, and add all project acquisition costs to the Master Fixed Asset list.

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 over 1,400 annual, assuming and leaving office statements for public officials plus numerous candidate/campaign disclosure statement filings. The process entails 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 is only minimally automated today.

Earlier this year, the department began an effort to find an improved product for managing and providing access to the documents. After review of several systems, one modular system was found in use in several California counties, including Butte, Contra Costa, Fresno, Orange, San Mateo, Santa Barbara and Ventura, which seemed to provide an excellent automated solution for managing both FPPC disclosure filing processes. The software products, CampaignDocs™ and DisclosureDocs™ from SouthTech Systems, Inc. of California, are specifically designed for managing California's FPPC documents and filing requirements and supporting imaging and public accessibility, including through website access.

From its review, the department believes that use of the software products will improve the functionality of the filing processes overall for department staff, agencies and filers and will increase access to reported information for the public. An overview of the features and benefits of the software products is attached.

Fiscal Impact

Approving this request will result in an increased costs of approximately \$70,305 in FY 2007-08 for the CampaignDocs™ and DisclosureDocs™ software acquisition and implementation, required computer equipment, software maintenance, and communications support costs over the amount currently budgeted for the department's present candidate/campaign disclosure software licensing and maintenance. However, with an approved budget revision, the increased cost will be fully reimbursed from Recorder's Trust Funds.

Additionally, the ongoing system maintenance and telecommunications support costs will be reduced to an estimated \$25,200 annually or less, which will cover two systems, compared to the nearly \$54,000 currently required and budgeted for licensing, maintenance and support of the department's present candidate/campaign disclosure system, which has less functionality. It is also conservatively estimated that use of the system will save up to 25% of the staff time that is currently devoted to management and maintenance of the disclosure filing processes and documents, while at the same time allowing for more timely and accurate tracking of filings by staff and increased public access to the documents filed.

Action Requested

It is therefore recommended that your Board approve the following requested actions:

Approve the Placer County Clerk-Recorder-Registrar of Voters to contract with SouthTech Systems, Inc. for acquisition and implementation of the CampaignDocs™ and DisclosureDocs™ software to provide campaign and disclosure document management, tracking and web publishing/ public viewing access in an amount not to exceed \$85,990 plus additional costs for necessary computer equipment (\$16,600), annual system maintenance (\$10,740) and telecommunications costs (\$9,600 plus installation) for FY 2007-08; approve a budget revision for reimbursement from Recorder Trust Funds of the increased costs in the amount of \$70,305 above that already budgeted for disclosure system costs in FY 2007-08, and add all project acquisition costs to the Master Fixed Asset list.

CampaignDocs™

A solution for managing the business process of the FPPC mandated Campaign Disclosure Filing

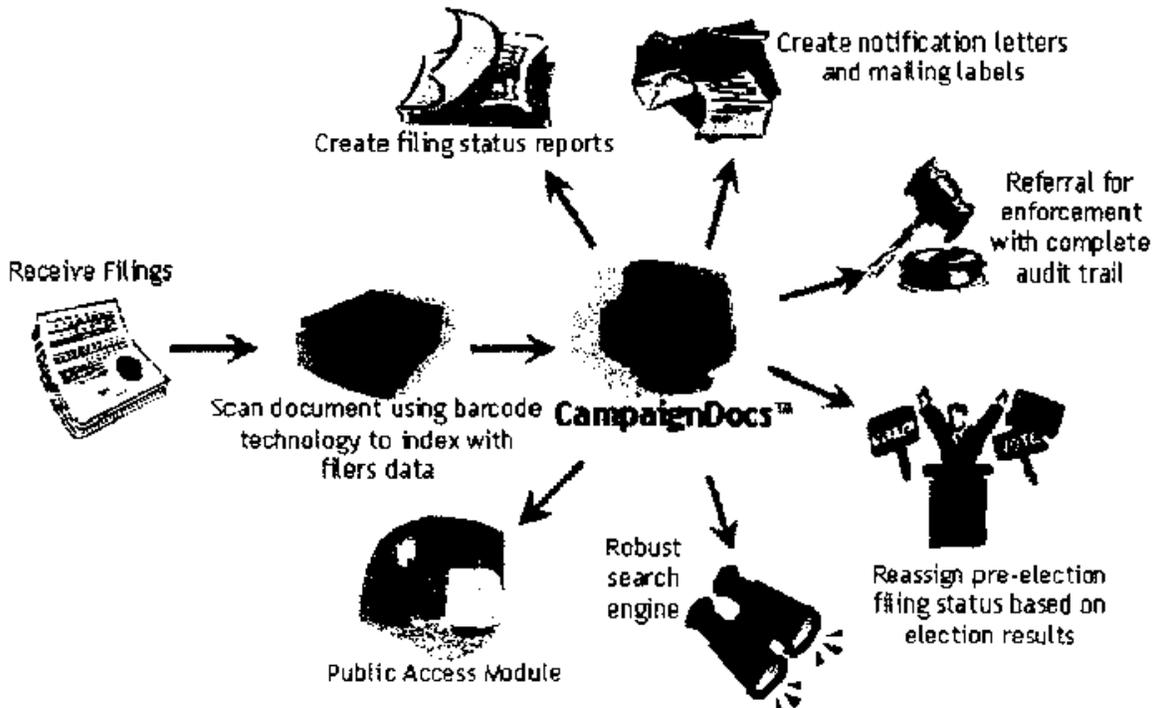
CampaignDocs™ is a database system which utilizes imaging, bar-coding, automatic report generation, and mail merge to manage the continuous process of Campaign Disclosure Filings of candidates, committees, large donors, and slate mailers

This image-enabled database system offers:

- Imaging to store an electronic copy of the filing;
- Barcode technology to automatically index the image with the filer data;
- Automatic report generation of filing status;
- Automatic tracking of filing requirements;
- Mail merge to print labels and notification letters as needed;
- A robust search engine with "drill down" to locate and retrieve historical data;
- A Public Access module to improve services;
- Quick and easy data entry of all relevant information of filing entity, including:
 - Name, address, phone
 - Treasurer information
 - Purpose of organization
 - Filing status
 - Election dates
 - Type of filing.

CampaignDocs™ increases staff productivity while decreasing costs associated with managing the business process of Campaign Disclosure Filings process and increasing access for the public to information reported.

CampaignDocs™ Process Overview



DisclosureDocs™

A solution for managing the business process of the FPPC mandated filing of the "Statement of Economic interest", Form 700.

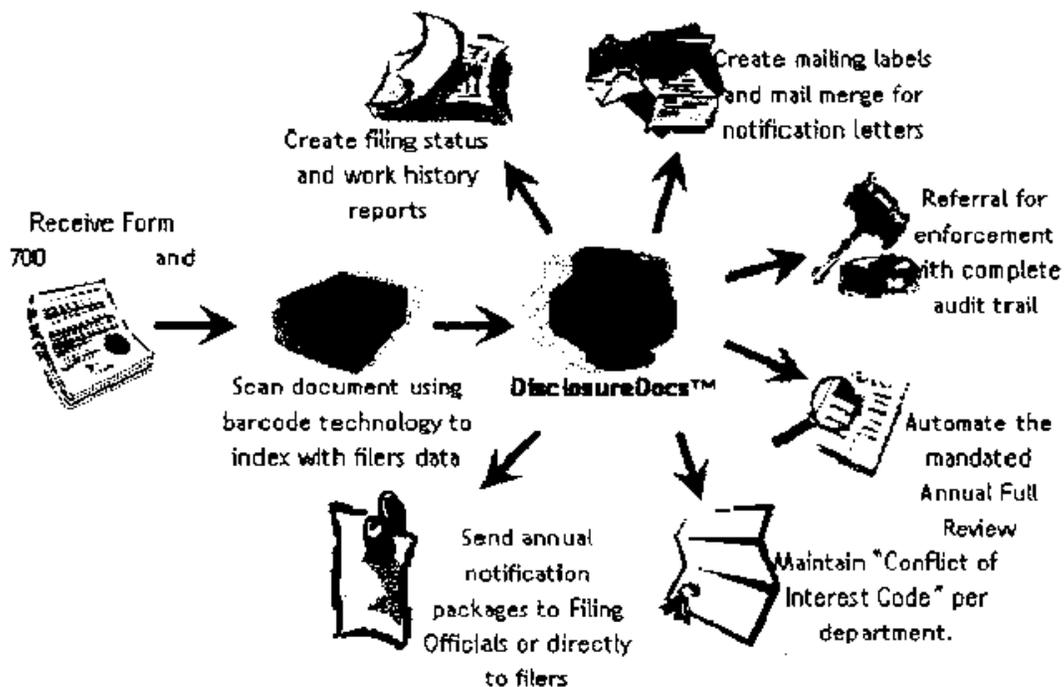
DisclosureDocs™ will assist in complying with the FPPC guidelines for the designated Filing Officer.

This image-enabled database system offers:

- Imaging to store an electronic copy of the filing;
- Barcode technology to index the image with filer data;
- Automatic report generation including filing status and work history;
- Mail merge to print labels and notification letters as needed;
- The electronic creation and completion of the Annual Full Review;
- The creation of annual notification packages to assist filers with the proper completion of their filing, based on the Conflict of Interest Code;
- Quick and easy management of existing and new filers including entering relevant data, logging phone calls and e-mails, printing barcode, and complete work history;
- Printing letters and mailing labels and management of compliance all in one menu. The desired letter is selected and the database extracts the filers to receive the letter. Click print and the process of mail merge is completed at a network printer. The 14 letters available can be customize in Word and automatically generated through the system;
- A search engine for quick and easy retrieval of historical data by department, position, or name; and
- An integrated user guide for quick help during use.

DisclosureDocs™ increases productivity and decreases costs for managing the annual filing process while increasing access for the public to information reported.

DisclosureDocs™ Process Overview



PLACER COUNTY

BUDGET REVISION

PAS DOCUMENT NO.

POST DATE:

DEPT NO.	DOC TYPE	Total \$ Amount	TOTAL LINES
07 BR		247,860.00	9

Cash Transfer Required

Auditor-Controller

Reserve Cancellation Required

County Executive

Establish Reserve Required

Board of Supervisors

ESTIMATED REVENUE ADJUSTMENT

APPROPRIATION ADJUSTMENT

DEPT NO.	T/C	Rev	Fund	Sub Fund	OCA	PCA	OBJ 3	PROJ.	PROJ DTL	AMOUNT	DEPT NO.	T/C	Rev	Fund	Sub Fund	OCA	PCA	OBJ 3	PROJ.	PROJ DTL	AMOUNT
07	006		100		000710	00300	8156			6,703.00	07	014		100		000710	00200	4451			52,510.00
07	006		100		000710	00200	8254			63,602.00	07	014		100		000710	00300	4451			50,080.00
											07	014		100		000710	00200	2291			5,792.00
											07	014		100		000710	00300	2291			4,948.00
											07	014		100		000710	00200	2051			5,300.00
											07	014		100		000710	00300	2051			5,300.00
											07	015		100		00710	00300	2555			53,625.00
TOTAL										70,305.00	TOTAL										177,555.00

2007 OCT 22 10 23 AM
 AUDITOR-CONTROLLER

REASON FOR REVISION: For purchase/ming of CampaignDocs, WebPublisher & DisclosureDocs systems, including I-1 installation & on-going costs, with reimbursement from Micrographics Trust Fund and Automation Trust Fund.

Prepared by Vicki Kunimitsu Ext 5694

Department Head

Jim M. C...

Board of Supervisors

Date: 10/22/07

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Budget Revision # _____ FOR INDIVIDUAL DEPT USE

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