

# Cook County Clerk Karen A. Yarbrough



## Final Recommended Implementation Plan for the Assumption of Duties of the Cook County Recorder of Deeds by the Cook County Clerk

This page has been intentionally left blank.



## COOK COUNTY CLERK KAREN A. YARBROUGH

69 W. Washington Street, Suite 500, Chicago, Illinois 60602

TEL 312.603.0996 FAX 312.603.9788 WEB [cookcountyclerk.com](http://cookcountyclerk.com)

Dear Residents of Cook County,

We are ecstatic to report on the important work being conducted to effectuate the assumption of the duties of the Office of the Recorder of Deeds by the Office of the Clerk. Clerk Yarbrough has been fortunate to helm both offices and knows firsthand the tremendous work being performed on behalf of the public. We have spent much of our time speaking with those on the ground doing the work and those who use the services of the two offices. Staff from both the Clerk and Recorder of Deeds Offices, as well as the Cook County Board President's Office, have collaborated, shared and reviewed information, and provided recommendations regarding how best to facilitate the assumption of duties by the Office of the Clerk. Importantly, it has been our goal to deliver to the public the highest quality of services in an efficient and cost-effective manner.

The impending assumption of the Recorder of Deeds' duties by the Clerk's Office has created an opportunity to reimagine workflows and the customer experience. To this end, we have done a wholesale review of the Recorder of Deeds functions and how these functions will be performed by the Clerk's Office commencing this December. We looked to other jurisdictions and studied their methodologies. We utilized data and information to drive our decisions. At the end of the day, we determined that the work of the Recorder of Deeds Office can be conducted at reduced costs through technology and innovation.

The Recorder of Deeds Office will no longer be in existence on December 7, 2020 and all functions will effectively be under the authority of the Clerk's Office at that time. This Plan underscores our methods and how we will successfully assume the duties of the Recorder of Deeds on December 7, 2020. Throughout the development of this Plan, we have been faced with many difficult decisions. Some of these decisions involve cuts that are necessary to streamline services and save taxpayers' money. Some of these decisions will result in a significant investment of time and money that may increase costs in the short term, while setting the stage for significant savings later down the road. In the end, however, we are working to develop a recording function of the future that will be on the cutting edge and meet our customers' needs for years to come.

Importantly, the progress of our work, and all of our lives, have been deeply impacted by the unprecedented COVID-19 pandemic. We are mindful of possible limitations on in-person collaboration in the near future and expect to be flexible in response. While the assumption of duties will occur by operation of law on December 7, 2020, the goals of the assumption of duties may require that implementation of the Plan extend past the December 7, 2020 date.

We welcome a robust discussion about the information provided in this Plan. We will aim to further hone our Plan and work toward implementing the assumption of duties by the Clerk in a way that will be cost effective and beneficial to the people of Cook County.

Karen A. Yarbrough  
Clerk of Cook County



Edward M. Moody  
Cook County Recorder of Deeds



# FINAL RECOMMENDED IMPLEMENTATION PLAN FOR THE ASSUMPTION OF DUTIES OF THE COOK COUNTY RECORDER OF DEEDS BY THE COOK COUNTY CLERK

## Table of Contents

Section I: Background	1-2
Section II: Functions and Duties	3-4
Section III: Goals and Policy	5-6
Section IV: Methodology	7-8
Section V: Recommendations and Time Frames	9-13
Section A: Recommendations and Time Frames - Administrative and Operational	10
Section B: Recommendations and Time Frames - Information Technology	11
Section C: Recommendations and Time Frames - Human Resources	12
Section D: Recommendations and Time Frames - Finance and Procurement	13
Section VI: Timeline	14-15

Section I:  
**Background**



**Final Recommended Implementation Plan  
for the Assumption of Duties of the  
Cook County Recorder of Deeds  
by the Cook County Clerk**

## I. BACKGROUND

Governmental budgets have been strained due to the increasing costs of providing critical services to the public. Residents of Cook County are also feeling the strain on their family budgets and many families are unable to bear the cost of additional taxes or fees. As a result, residents and government officials alike are looking to find ways to reduce costs while maintaining the critical services being relied on by those throughout the County. As a result, there has been a movement to eliminate certain governmental entities in an effort to eliminate redundancies and administrative costs. To this end, the residents of Cook County have approved a referendum that would require the absorption of the functions and duties currently performed by the Recorder of Deeds by the County Clerk's Office. This will occur by operation of law on December 7, 2020. In Illinois, only counties with populations over 60,000 may have separate Clerk and Recorder Offices. Proponents of a combined Clerk and Recorder's Office argue that Clerk and Recorders' Offices in Illinois do similar work in collecting, maintaining and retrieving documents. While it is true that the Clerk and Recorder's Offices do accept, maintain and retrieve documents, the requirements relating to the performance of these functions are distinct and constitute only one aspect of the essential functions of Clerk and Recorder Offices. In addition to document management, the Cook County Clerk's Office conducts elections, issues vital records, provides real estate tax redemption services, performs the property tax calculations for the tax cycle, and serves as the Clerk of the Cook County Board of Commissioners. The Recorder of Deeds also operates a Property a Fraud unit, and a Veteran's Service division.

In working together to facilitate the assumption of duties by the Clerk, representatives from the Clerk and Recorder of Deeds have met regularly to discuss the assumption of duties historically performed by the Recorder of Deeds. In addition, the Cook County Board President's Office has been present in most meetings and provided valuable insights into areas that impact the administration of Cook County government. Working groups, comprising of staff from the Clerk, Recorder of Deeds, and the President's Offices were created to identify issues arising as a result of the assumption of duties and provide recommendations as how to implement various components of the Clerk's assumption duties. These groups consist of:

1. Information Technology
2. Administration/Operations
3. Accounting/Finance, Procurement
4. Human Resources

These working groups developed recommendations, which make up the crux of this Recommended Implementation Plan.

Due to the complexities and technicalities in assuming the duties of the Recorder of Deeds Office, the two offices have contracted with a municipal law firm to provide assistance and counsel regarding labor relations and human resources matters. We have also contracted with a financial firm to complete a financial review, risk assessment, and assist in the development of the financial schematics.

Section II:

# Functions and Duties



**Final Recommended Implementation Plan  
for the Assumption of Duties of the  
Cook County Recorder of Deeds  
by the Cook County Clerk**

## **II. FUNCTIONS & DUTIES**

### **Office of the Cook County Recorder of Deeds**

The quintessential functions of the office of the Cook County Recorder of Deeds is to accurately record, store, and maintain land records and other official documents in perpetuity to facilitate home ownership and mortgage lending. The primary duties and responsibilities consist of recording and imaging documents, maintaining an index of recorded documents, customer service, collection and remittance of fees from point of sale transactions, storage and retrieval of historical documents, and maintaining a public research area.

In addition, pursuant to statutory authority, the Recorder of Deeds maintains a Property Fraud unit to help homeowners investigate fraudulent filings against their property and coordinate law enforcement efforts on behalf of victims. This includes operating a free Property Fraud Alert program to allow property owners to receive alerts that new documents have been recorded that affect the chain of title on their property. The office also safeguards vital military discharge records and operates a Veteran's Service division to provide veterans and their families with dignified and attentive service.

#### **Statistics**

- Full Time Equivalent Employees: 100
- Corporate Budget: \$7.2M
- Special Funds Budget: \$53M
- Annual Revenue: \$40.4M

### **Office of the Cook County Clerk**

The Cook County Clerk's Office has a wide-ranging set of responsibilities. Traditionally it is the official keeper of several types of government records. It prepares agendas, memorializes actions taken by the Board, and maintains the Board's legislative records and Code of Ordinances. It maintains and provides vital records including birth, marriage, civil union and death certificates dating to 1872. The Vital Records division also administers business registrations, assumed names, notary commissions and an award-winning genealogy website. In addition, the County Clerk receives, processes and makes available to the public more than 22,000 Statements of Economic Interests filed annually, as well as lobbyist registrations and semi-annual reports.

The Clerk's Office plays an essential role with respect to local property taxes by issuing property tax rates, establishing permanent real estate numbers, applying new tax codes, updating real estate maps, and processing redemptions of delinquent property taxes. Among its more complex and consequential duties, the Cook County Clerk's Office administers elections for suburban Cook County's 1.6 million registered voters, which entails voter registration, judge recruitment and training, and polling place identification, mapping and management.

#### **Statistics**

- Full Time Equivalent Employees: 262
- Corporate Budget: \$11.2M
- Special Fund Budget: \$22.7M
- Annual Revenue: \$10.2 M



Section III:  
**Goals and Policy**



**Final Recommended Implementation Plan  
for the Assumption of Duties of the  
Cook County Recorder of Deeds  
by the Cook County Clerk**

### III. GOALS AND POLICY

#### **Goals/Objectives:**

To reduce taxpayer costs by streamlining services, eliminating redundant positions, and maintaining transparency and accountability to the public.

#### **Initial Strategy:**

##### IMPLEMENT BEST PRACTICES & INNOVATION

- Improve management of spending
  - » Review for redundant or non-essential tasks.
  - » Review procurement processes and policies.
  
- Increase operational efficiency and institute cost-effective measures
  - » Review data and metrics when considering new software system applications.
  - » Assess technology for possible consolidation.
  - » Review operational workflows and processes.
  - » Consider capital consolidation such as physical/workspace.
  - » Explore areas of collaboration with Cook County.
  
- Develop and Implement Standardized Practices
  - » Foster an office culture of creating policies driven by data and metrics.
  - » Apply industry best practices providing uniformity and standards across all operations wherever possible.

##### MAINTAIN TRANSPARENCY & ACCOUNTABILITY TO THE PUBLIC

- Publicize the initiatives relating to the assumption of duties to ensure public awareness through all means of communication.
- Formalize organizational structure to highlight accountability.

Section IV:  
**Methodology**



**Final Recommended Implementation Plan  
for the Assumption of Duties of the  
Cook County Recorder of Deeds  
by the Cook County Clerk**

## **IV. METHODOLOGY**

### **A. Joint Committee & Working Groups**

The Joint Committee was established to discuss, strategize, and develop an implementation plan for the County Clerk's assumption of the duties of the Recorder of Deeds. The Joint Committee is comprised of: the co-chairs, the Honorable Karen Yarbrough (Clerk), the Honorable Edward Moody (Recorder of Deeds), members of their senior staff, and members of the Cook County President's Office.<sup>1</sup>

In addition, four working groups were created to review key areas relating to the assumption of duties. These included the following: 1) Information Technology, 2) Human Resources, 3) Accounting/Finance/Procurement, and 4) Administration/Operations. A representative member from the Joint Committee will also join each Working Group and act as the liaison between the groups. Working Groups were comprised from amongst current employees (who perform the daily work) and were tasked with reviewing data and information to develop recommendations for each respective area noted above. The Working Groups provided quarterly reports which were received and considered by the Joint Committee. With those reports, the Joint Committee has created the recommendations herein.

### **B. Final Recommended Consolidation Plan**

The Joint Committee will identify and reach out to public stakeholders who can provide input and additional perspective to the Final Recommended Implementation Plan. Following any meaningful public input, the Joint Committee may incorporate additional suggestions and create the Final Implementation Plan for the Assumption of Duties of the Recorder of Deeds by the County Clerk.

---

<sup>1</sup> The members of the Joint Committee changed from time to time depending upon the naturally evolving needs of the Joint Committee and the participant's changes in status.

Section V:

# Recommendations and Time Frames



**Final Recommended Implementation Plan  
for the Assumption of Duties of the  
Cook County Recorder of Deeds  
by the Cook County Clerk**

## V. RECOMMENDATIONS & TIME FRAMES

### A. Administrative & Operational

#### **Administrative Functions**

- All forms, website, platforms, and signage to have name of Recorder of Deeds replaced with Clerk of Cook County.
- Internal and external written communication to third party partners and other offices or organizations that interface with one or both offices. Communications will include information regarding the assumption of duties with updated contact information.

#### Action Items and Time Frames:

- » Recorder of Deeds to provide or identify all relevant documents, items for update by September 30, 2020.
- » Recorder of Deeds to identify relevant third parties for delivery of communication by September 30, 2020 with communications to be sent by October 31, 2020.
- » Materials and items to be updated by December 7, 2020.

#### **Recorder of Deeds Functions Absorbed By Clerk's Operations**

- Recording functions and duties to be assumed by the Clerk's Real Estate and Tax Services Division.
- Property Fraud unit's functions and duties to be assumed by the Clerk's Legal division.
- Veteran's Services' functions and duties to be assumed by the Clerk's Communication division.
- Outsource the Recorder of Deeds' indexing duties and functions to a third party (until the new collection and document management platform is established with the assistance of the County's Procurement Office). Establish an exception processing function.

#### Action Items and Time Frames:

- » Quarterly discussions between respective areas of operations, with exchange of information and data in anticipation of the assumption of duties.
- » Consider different options for outsourcing of indexing functions currently performed by the Recorder of Deeds Office.

#### **Physical Space and Re-Design**

- In conjunction with the President's Office and the Cook County Bureau of Asset Management, the Clerk will reallocate physical space upon the assumption of the duties. Review of the current space will continue and recommendations of strategy and design, with consideration of guidelines contained within the Power of Place: *Workplace Strategy & Design Guidelines* issued by the President's Office, which can be located at [https://www.cookcountyil.gov/sites/default/files/cook\\_county\\_wsd\\_executive\\_summary.pdf](https://www.cookcountyil.gov/sites/default/files/cook_county_wsd_executive_summary.pdf).

- Physical space reallocation plans
  - » As Vital Records has the most public facing services, relocate Vital Records to the first floor of 118 N. Clark and operate these services alongside recording services, which currently reside in that location.
  - » Relocate the Clerk’s administrative offices to the 118 N. Clark, 2<sup>nd</sup> Floor where the current Recorder of Deeds administrative offices reside.

Action Items and Time Frames

- » Ongoing process with Cook County to complete Vital Records movement by late 2020.
  - » Start planning process for movement of the Clerk’s administrative offices, Spring 2020.
- Recommendations for additional physical space reallocation:
    - » Review of all physical workspaces to determine whether the space supports the employees in their job functions and determine whether the space supports holistic experiences.
    - » Ensure and review optimal sustainable efforts and other legal compliance.
    - » Consider any other recommendation that may benefit the public.

**B. Information Technology**

- Cybersecurity
  - » The Clerk’s current cybersecurity monitoring practices have been expanded to include the Recorder of Deeds’ networks.
- Utilize the same Point of Sale (Collection) and Document Management Technology Platforms
  - » Both offices currently use two separate cashiering and document management systems.
  - » The Clerk’s Office has procured new point of sale (collection) and document management systems.
  - » Based on a recommendation from the Cook County Director of Budget, the Clerk and Recorder of Deeds explore the feasibility of using the Clerk’s new platform in both offices.
  - » Demonstrations of the new platform to subject matter experts of Recorder of Deeds have been completed.

Action Items and Time Frames:

Ongoing process with Cook County Procurement

- Indexing Operations
  - » Development of the new system with OCR-Indexing functionality.

Action Item and Time Frame: TBD in 2021-2022 For development and implementation

- Use of the Clerk’s “ClerkIT” trouble ticket system for reporting and managing IT issues.
- Integration of Recorder of Deeds hardware inventory into Clerk’s hardware inventory.
- Integration of the networks—including the physical networks, email systems, access control systems and governance procedures.

Action Items and Time Frames: Begin FY 2021 (December)

- IT Integration Long Term Projects
  - » Website integration will require additional review. The two websites are not currently compatible. Short term workarounds include using a link between each homepage for public accessibility. Website integration will require additional funding, and a review and assessment of budget impact will be made during Q2. Request capital funds for the integration of the websites.
  - » Future replacement of outdated Recorder of Deeds hardware, which will have budget impact and thus require ongoing discussions of the Cook County Bureau of Technology and the Cook County Department of Budget and Management Services.

### C. **Human Resources**

- Collective Bargaining Agreements
  - » After the Clerk’s Office assumes recording duties, the Recorder’s Office will cease to exist by operation of law and the collective bargaining agreement between the Recorder of Deeds and SEIU 73 will expire by its own terms. Given the elimination of the Recorder’s Office, the collective bargaining agreement will not be renewed or re-negotiated.
  - » Final staffing decisions are under review. The human resources department anticipates the process of implementing such decisions will begin in late Spring and continue throughout the summer months. To the extent that new positions at the Clerk’s Office are contemplated or required due to the assumption of duties currently performed by the Recorder of Deeds Office, postings will be made in accordance with the applicable hiring practices established by the Clerk’s Office.
- Job Description and Assignment of Duties
  - » All newly created positions relating to the absorbed duties and functions of the Recorder of Deeds Office will require new job descriptions. These job descriptions will include duties established through updated workflows and may involve updated job titles that will reflect the nature of each position. The revised job descriptions will also be used to analyze how to best reorganize the Clerks’ Office to ensure efficiency after the Recorder’s Office is dissolved.

Action Items and Time Frames:

- » Clerk staff will meet with the appropriate union representatives and address any outstanding labor issues by end of June 2020.



- » Obtain consultant to conduct interview and selection of candidates for newly formed recording functions by end of June 2020.

#### **D. Finance & Contracts**

##### Finance and Procurement

- Establish an Accounting Platform
  - » Deploy the Clerk's Office's current accounting/general ledger system, Great Plains, for the Recorder of Deeds Accounting functions.
  - » Expanding the Great Plains platform to include Recorder of Deeds Accounting functions will require capital funding for FY2021.
- Consolidate banking accounts through negotiating best competitive rates for tax payers.
- Contract reviews of common services and/or equipment may require contract amendments to be completed.
- Work with Budget Office on FY2021 budget.
- Utilize Financial Consultant for the following:
  - » Development of financial schematics including, but not limited to, banking services and recommendations for a consolidated budget and financial reporting for the Clerk's Office after the assumption of duties of the Recorder of Deeds Office.
  - » Creation of corresponding financial implementation plan for the assumption of duties of the Recorder of Deeds Office, as a new division, within the Clerk's Office.

Section VI:  
**Timeline**



**Final Recommended Implementation Plan  
for the Assumption of Duties of the  
Cook County Recorder of Deeds  
by the Cook County Clerk**

<b>Time Frame</b>	<b>Target Benchmarks</b>
<p style="text-align: center;">2020 Q2 4/1/2020—6/30/2020</p>	<p>Publicize Recommended Implementation Plan. Seek and consider public stakeholder input on Recommended Implementation Plan.</p>
<p style="text-align: center;">2020 Q3 7/1/20/2020—9/30/2020</p>	<p>Continue input. Issue Final Implementation Plan. Initiate transition efforts in preparation for 12/7/2020.</p>
<p style="text-align: center;">2020 Q4 10/1/2020—12/7/2020</p>	<p>Continue implementation of Final Implementation Plan.</p>
<p style="text-align: center;">12/7/2020</p>	<p>Pursuant to referenda, the Cook County Recorder of Deeds shall be eliminated, and all duties and responsibilities of the Cook County Recorder of Deeds be transferred to and assumed by the Office of the Cook County Clerk.</p>

**Karen A. Yarbrough**  
**Cook County Clerk**

69 W. Washington, Fifth Floor  
Chicago, IL 60602  
312.603.0900  
[cookcountyclerk.com](http://cookcountyclerk.com)

