

**COUNTY OF MILWAUKEE  
INTEROFFICE COMMUNICATION**

Date: November 8, 2019

To: Supervisor Theodore Lipscomb, Sr., Chairman, County Board of Supervisors

From: Lynn J. Fyhrlund, Director and Chief Information Officer, Information Management Services Division, Department of Administrative Services

*Prepared by: Anu Bhangoo, IT Director – Governance and Strategy, Information Management Services Division, Department of Administrative Services*

Subject: Assessment Report of Information Management Services Division, Department of Administrative Services and the Register of Deeds, on the Register of Deeds' technical footprint.

**REQUEST**

2019 Adopted Budget Amendment 1A015 requires the Department of Administrative Services - Information Management Services Division (DAS-IMSD) to work in conjunction with the Register of Deeds (ROD) to assess the ROD technology environment and submit a report on the opportunities to improve operational efficiencies, data redundancy, availability, and sustainability of its critical records. This assessment has been completed and DAS-IMSD would like to respectfully submit its final report to the Milwaukee County (County) Board of Supervisors.

**BACKGROUND**

The 2019 Milwaukee County Budget Amendment 1A015 directed DAS-IMSD to perform, "an assessment of the Register of Deed's technical footprint. The assessment will explore opportunities to improve operational efficiencies, data redundancy, availability, and sustainability of critical records. DAS-IMSD, working in conjunction with the Register of Deed, will provide a report to the County Board outlining its findings no later than June 2019." However, due to delay in the appointment of vacant ROD position by the governor of state of Wisconsin, per file no. 19-502, the County Board granted DAS-IMSD the permission to submit this report no later than January 2020.

DAS-IMSD has now completed the aforesaid assessment in conjunction with the ROD and respectfully submits this report.

**ASSESSMENT REPORT**

DAS-IMSD has identified six (6) business processes of ROD that use technology to assess and explore opportunities for improving operational efficiencies, data redundancy, availability, and sustainability of ROD's critical records. These are as follows:

**I. Fidlar Bastian Hosting Services**

What is it?

The service provides a secure platform without the typical maintenance and management of a local server infrastructure and reduces the traffic on Milwaukee County (County) networks from remote searchers. Security measures include a secondary, off-site repository that backs up the hosted servers; ensuring the safekeeping of County data.

What is the current cost?

- Approximately \$24,600/quarter = \$98,400/annual
- The above cost is determined by the amount of storage used

Can we replace it? If so, at what cost?

Fidlar Bastian can be replaced by utilizing the current services agreement with OneNeck, County's hosted service provider. Upfront costs (OneNeck server setup, SQL License, and DAS-IMSD resources) would amount to a one-time charge of \$25,000. Ongoing annual support (monthly storage fees and DAS-IMSD resources) would be approximately \$18,000.

DAS-IMSD Assessment

*Operational Efficiencies:* ROD will gain fiscal efficiencies by migrating data from Fidlar Bastian to County hosted server environment at OneNeck. This will save ROD approximately \$80,000 annually in hosting fees. After careful consideration and in consultation with DAS-IMSD, the ROD leadership team agrees that the Fidlar Bastian Hosting Services contract should be terminated in calendar year 2020 and that its data should be transferred to OneNeck.

*Data Redundancy:* Both Fidlar Bastian and OneNeck provide data redundancy. There is low risk of losing data.

*Availability:* Both Fidlar Bastian and OneNeck provide high availability. There is low risk of either systems not being available.

*Sustainability:* Both Fidlar Bastian and OneNeck are well established companies. With current contracts and maintenance agreements, all records are in sustainable environment.

**II. Fidlar Software Applications**

What is it?

The ROD office currently uses AVID and it's three (3) software application modules (Laredo, Tapestry and Monarch) owned by Fidlar Technologies (Fidlar) to manage and share the land records of real estate within the County. Below are further details on the each of them:

<b>Application</b>	<b>What is it?</b>	<b>What is cost?</b>	<b>What is revenue?</b>
<b>AVID</b>	AVID is a land records management solution providing the input, imaging and indexing of physical and electronic copies of documents. Application also provides the cashiering process for processing payment at the Courthouse	\$108,445/annual	\$0.00
<b>Laredo (AVID module)</b>	Laredo is a search engine within AVID that allows regular searchers of a county's public record 24/7 access to search over the internet. This is used by high volume searchers like title companies	\$11,824.77/quarter = \$47,299.08/annual (approx. costs based on number of searches)	\$800/month per user and \$400/month per additional ID (Actual revenue in 2019 = \$25,600/month)
<b>Tapestry (AVID module)</b>	Tapestry is an online service within AVID that allows regular or occasional users to search a county's public record. This is used	\$0.00	\$2.75 per search and 50% of print fees (Actual revenue April - October 2019 =

	by county constituents to search documents without coming to the courthouse		\$86,086)
<b>Monarch (AVID module)</b>	Monarch is a data dump (with water mark) from AVID to large customers like Zillow	\$0.00	\$0.10 cents per image (Actual revenue January – September 2019 = \$143,860)

Can we replace it? If so, at what cost?

There are a few software vendors in the United States that provide tools that could be used by the ROD to provide timely, secure, accurate, archival accessible and cost-effective record systems and services. The ROD office is in the process of investigating the feasibility of making a change to its software vendor once the current contract with Fidar ends on December 1, 2022. However, it is important to note that some vendors may not have the capability to integrate tax listing into their programs and only a very few can manage the input data for the counties with population over 1,000,000 residents.

DAS-IMSD Assessment

*Operational Efficiencies:* AVID, Laredo, Tapestry and Monarch are essential applications for the function of the ROD office. DAS-IMSD did not identify any operational efficiency that can be gained by changing these applications at the present time. However, DAS-IMSD will continue to be involved in lifecycle management of these applications and will be available to assist the ROD with the evaluation of other vendors that offer similar products.

DAS-IMSD has also reviewed the contracts signed for these applications by the ROD with Fidar and has renegotiated these contracts to ensure that any onerous terms that unreasonably favor the vendor and do not protect the County interests have been taken out from this contract. DAS-IMSD has made sure that proper service level agreements, County mandatory contract terms and IT security clauses are included in the new contract.

*Data Redundancy:* Not applicable.

*Availability:* All these applications are readily available.

*Sustainability:* These applications are regularly maintained by Fidar.

**III. Underground Vaults and Storage**

What is it?

Underground Vaults & Storage, Inc. provides records and information management solutions in a salt mine facility located 650 ft. underground in Kansas. Since 1967, the ROD has been using this service to store microfilm in a private leased vault (sized 7' wide x 21' deep x 9; high) to store County documents.

What is the current cost?

County currently spends \$1,343 annually for leased space, microfilm camera service contract is \$8,823 annually, and additional fees for film processing, postage, and staff costs. Total cost per year is approximately \$20,000 to \$25,000.

Can we replace it? If so, at what cost?

Yes, we can replace it because electronic copies of all documents are stored in multiple applications. Disaster recovery plans are in place for these applications with multiple backups and redundancy. Documents currently stored in underground vaults will need to be destroyed by the

Underground Vaults and Storage vendor. Fees for this service amounts to \$5 per box. An inventory would be required to determine the total number of boxes.

#### DAS-IMSD Assessment

*Operational Efficiencies:* There are no operational efficiencies by maintaining microfilm in underground vaults and storage. After careful consideration, including discussions with peers across the state of Wisconsin, the ROD has also determined this contract and service should be terminated at the end of 2019. There is neither governmental statute to store records on microfilm, nor is there any technological benefit from this service.

*Data Redundancy:* Electronic copies are maintained in other services.

*Availability:* Not applicable.

*Sustainability:* With the latest technology, underground storage is not required for record retention.

#### **IV. OnBase - ROD Records**

##### What is it?

Onbase is County's enterprise document management system. It is storing 509,000 marriage records (for calendar years 1830 - 1967) and 782,000 death records (for calendar years 1872 -1989). When County residents inquire about documents related to this time period, ROD staff can retrieve them through this system.

Records of marriage post – calendar year 1968 and deaths post - calendar year 1989 are stored in the state of Wisconsin's Statewide Vital Records Information System (SVRIS).

##### What is the current cost?

OnBase enterprise licensing fees is based on number of total County users and is cross-charged to the ROD based on number of users in the department. The ROD's current cost is approximately \$3,000 annually.

##### Can we replace it? If so, at what cost?

DAS-IMSD does not recommend replacement of OnBase as it is County's enterprise document management solution. It offers the strongest functionality, centralized support.

#### DAS-IMSD Assessment

*Operational Efficiencies:* Using standard enterprise applications and maximizing use of current Milwaukee County technologies gives the ROD an operational advantage and efficiencies.

*Data Redundancy:* OnBase data is backed-up and maintained in multiple locations.

*Availability:* OneNeck (which hosts OnBase) provides high availability. There is a low risk of OnBase not being available.

*Sustainability:* Hyland OnBase is a one of the best-of-breed document management system. With current contracts and maintenance agreements in place with OneNeck, all records are in sustainable environment.

## V. Heartland Label Printers

### What is it?

Scan Pro 3000 prints large print from microfilm.

### What is the current cost?

\$1,065/ annual for maintenance service.

### Can we replace it? If so, at what cost?

These scanners provide the functionality to print from microfilm and are not replaceable. County has records on microfilm stored locally.

### DAS-IMSD Assessment

*Operational Efficiencies:* These Scan Pro 3000 scanners provide the functionality to print large print from microfilm and are not replaceable.

*Data Redundancy:* Not applicable.

*Availability:* Not applicable.

*Sustainability:* There is a risk that Heartland may be the only vendor providing these services. This may put County at risk.

## VI. US Imaging

### What is it?

This service is for indexing of land records for input into Fidlar AVID. Previously, there were six FTE County staff performing this work. In August of 2011, it was decided by the ROD to outsource this manual process.

### What is the current cost?

\$3,000 - \$5,000/ month (based on the number of land records scanned).

### Can we replace it? If so, at what cost?

The insourcing of this service would require the creation of at least three (3) full-time positions. A Clerk Records position, at step one, is \$33,038 (salary) with \$20,580 (benefits).

- Total cost of 1 position is \$53,168
- Total cost of 3 positions is \$160,854

### DAS-IMSD Assessment

*Operational Efficiencies:* The ROD has decided it is more fiscally responsible to continue to outsource this activity.

*Data Redundancy:* Not applicable.

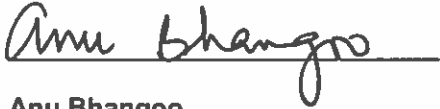
*Availability:* Not applicable.

*Sustainability:* There are multiple companies that will be able to provide these services.

## RECOMMENDATION

The Director and Chief Information Officer of the Department of Administrative Services – Information Management Services Division, respectfully requests this report be received and placed on file.

Prepared by:



**Anu Bhangoo**  
*IT Director of Governance and Strategy*  
DAS – IMSD

Approved by:



**Lynn J. Fyhrlund**  
*Director and Chief Information Officer*  
DAS-IMSD

cc: County Executive Chris Abele  
Supv. James "Luigi" Schmitt, Chair, Finance and Audit Committee  
Supv. Willie Johnson, Vice Chair, Finance and Audit Committee  
Members, Finance and Audit Committee  
Raisa Koltun, Chief of Staff, County Executive  
Kelly Bablitch, Chief of Staff, County Board of Supervisors  
Scott B. Manske, Comptroller  
Israel Ramón, Register of Deeds  
Teig Whaley-Smith, Director, Department of Administrative Services  
Joseph Lamers, Director of Performance, Strategy & Budget  
Steve Cady, Research Director, Comptroller's Office  
Shanin Brown, Finance and Audit Committee Coordinator  
LaCricia McSwain, Senior Manager, Central Business Office