

**COUNTY OF MILWAUKEE**  
Inter-Office Communication

Date: April 21<sup>st</sup>, 2023

To: Marcelia Nicholson, Chairwoman, Milwaukee County Board of Supervisors

From: Israel Ramón, Milwaukee County Register of Deeds

Subject: Register of Deeds 2022 Annual Report

File Type: Informational Report

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This informational report provides a report on how the Office of the Register of Deeds set and achieved its 2022 goals.

**POLICY**

This report aligns to Chapter 108: Achieving Racial Equity & Health.

Milwaukee County Code of General Ordinances:	<a href="#">Chapter 108: Achieving Racial Equity &amp; Health</a>
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**BACKGROUND**

[File 22-104](#) amends Chapter 108 to require that “annually, by April 30 of each year or sooner, each Milwaukee County department leader and/or their designee(s) shall provide a written and oral report outlining their year-end results to a Milwaukee County Board of Supervisors committee. The reports shall, at a minimum:

- (a) Indicate the year-end goals the department set in the prior year.

**RESPONSE:** Financial Year End Goals - The budgeted revenue goals for 2022 were \$5,754,667.00. The actual 2022 revenues received were \$6,226,523.36. This represents a revenue variance of \$471,856.36. The tax levy contribution goal was budgeted at \$4,456,864. The actual tax levy contribution was \$4,721,976.38. The 2022 tax levy surplus of \$265,112.38 is primarily from Real Estate Transfer Fees and General Recording Fees.

- (b) Share the rationale and relevance of the department’s performance metrics (i.e., explaining why they are “SMART” goals (specific, measurable, achievable, realistic, timely, and extending) and how they align to the county’s racial equity strategy, if applicable).

The Register of Deeds financial performance is tied to the overall health and strength of the Milwaukee County real estate market. This also includes the construction and sale of large commercial and residential buildings. The budget metrics are extrapolated based on the strength or weakness of the real estate market in the last three years prior to the new budget cycle. Because the Milwaukee County real estate market is dynamic and affected by both local and national factors such as interest rates, sales volumes and construction building trends as well as housing supplies, data does not fall squarely into the SMART Goals. Moreover, there is no way for the Register of Deeds office to track equity factors relating to recording transactions. This type of tracking is not statutorily mandated and is impossible to track given that the great majority of real estate recording transactions are done electronically or by US mail.

- (c) Report the department's year-end results relating to the goals it had set.

**RESPONSE:** Please see above. The 2022 year-end revenue projections were exceeded by \$471,856.36.

- (d) Provide a thorough analysis clearly articulating why goals were significantly exceeded, met, or not met.

**RESPONSE:** Goals for 2022 were reduced from those of 2021 due to a projected slowdown in the Milwaukee County real estate market. Total 2022 recording transactions were 105,873. This is down 35,450 recording transactions from 2021 which was 141,323 recording transactions. Rising interest rates since March 2022 led to an unfavorable mortgage refinance market for many consumers. Accordingly, our mortgage-related recordings decreased substantially, impacting recording revenue.

- (e) Explain the department's progress in creating a departmental-level strategic plan that aligns to the countywide strategic plan and provide an update about future plans to revise and enhance the departmental-level plan in the year ahead."

**RESPONSE:** In 2021, a reorganizational plan of the ROD Office that better fits its mission and operations relating to staffing needs, cross-training and cost-effective delivery of real estate and vital records services was instituted. That reorganization plan was included in the 2022 budget which was approved by the Board of Supervisors.

Cross training of real estate staff continued in 2022 as well as plans to remodel the Register of Deeds office to better serve county residents and lessen the effects of future COVID pandemic outbreaks.

### **ALIGNMENT TO STRATEGIC PLAN**

- 1A: Reflect the full diversity of the County at every level of County government

- 1B: Create and nurture an inclusive culture across County government
- 1C: Increase the number of County contracts awarded to minority and women-owned businesses
- 2A: Determine what, where, and how we deliver services to advance health equity
- 2B: Break down silos across County government to maximize access to and quality of services offered
- 2C: Apply a racial equity lens to all decisions
- 3A: Invest “upstream” to address root causes of health disparities
- 3B: Enhance the County’s fiscal health and sustainability
- 3C: Dismantle barriers to diverse and inclusive communities

Alignment to the above strategic objectives is articulated in response to the questions below.

## **BODY**

1. What were the top 3 goals of your department/office 2022? Please explain why they are “SMARTIE” goals (specific, measurable, achievable, realistic, timely, inclusive, and equitable) and how they align to the county’s racial equity strategy.
  - Goal 1:  
To enhance the issuance of vital records certificates and follow the statutory mandates for the issuance and registration of Vital Records to the public consistent with Wis. Stat., Sec. 69.21.
  - Goal 2:  
To enhance the delivery of Real Estate services to the public and our industry partners in an efficient, safe, and accurate manner consistent with Wis. Stat., Sec. 59.43 and corresponding statutes.
  - Goal 3:  
To view our hiring, processes, procedures and the efficient delivery of services and collection of revenues through a racial lens.
2. To what extent were these goals accomplished in 2022? Please explain.
  - a. Goal 1:  
Fully achieved by maintaining, hiring, and training staff which continued to work throughout the post pandemic period to assure our statutory obligations under Wis. Stat. Sec., 59.43 and 69.21 were fully complied with.

- b. Goal 2:  
Fully achieved by maintaining, hiring, and training staff which continued to work throughout the post pandemic period to assure our statutory obligations under Wis. Stat. Sec., 59.43 and 69.21 were fully complied with.
- c. Goal 3:  
Achieved, but subject to ongoing commitment to enhance equity in our office and hiring to better align with the County's Mission under MCCGO 108. Working closely with Milwaukee County Department of Human Resources and the Milwaukee County Office of Equity is of paramount importance in achieving equity in the Register of Deeds office.

3. What factors *enabled* progress toward accomplishing these goals?

**RESPONSE:** A dedicated leadership team that trained both existing and new employees in the policies, procedures, and mission of the ROD Office. Commitment to equity hiring and promotion by leadership team.

4. What factors *hindered* progress toward accomplishing these goals?

**RESPONSE:** Outside real estate market factors and post pandemic factors affecting hiring and retention of staff.

5. What is the status of your department/office in developing its strategic plan?

**RESPONSE:** The strategic plan over the next five years is to continue to reduce operation costs while maintaining the high level of services to our county residents and industry partners.

To continue to cross train document examiners and real estate research staff to allow flexibility in scheduling and meeting the needs of the public and our industry partners.

To complete the ROD Office remodel in 2023 which will enhance the delivery of services and optimize training of employees.

### **FISCAL EFFECT**

The report is informational only and there is no fiscal impact.

### **VIRTUAL MEETING INVITES**

### **PREPARED BY:**

Israel Ramón. Milwaukee County Register of Deeds

**APPROVED BY:** Same  
**ATTACHMENTS:**

cc: Kelly Bablitch, Chief of Staff, Milwaukee County Board of Supervisors  
Janelle M. Jensen, Legislative Services Division Manager, Office of the County Clerk