



Clerk of the Board of Supervisors
105 E. Anapamu Street, Suite 407
Santa Barbara, CA 93101
(805) 568-2240

BOARD OF SUPERVISORS AGENDA LETTER

Department Name:

Clerk -Recorder Assessor

Department Number:

062

Agenda Date:

7/14/2026

Placement:

Administrative Agenda

Estimated Time:

NA

Continued Item:

No

If Yes, date from:

NA

Vote Required:

Majority

TO: Board of Supervisors

FROM: Department Director(s): Joseph E Holland *Joseph E. Holland*
Clerk-Recorder, Assessor & Registrar of Voters

CONTACT: Melinda Greene, Chief Deputy Clerk-Recorder 805-568-2250, press 3

SUBJECT: Amendment for the Enterprise Records Management Contract with Tyler Technologies, Inc.

Concurrences:

County Counsel Concurrence:

As to form: Yes

Auditor-Controller Concurrence:

As to form: Yes

Risk Management Concurrence:

As to form: Yes

Recommended Actions:

That the Board of Supervisors:

- a) Approve and authorize the Chair to execute the Second Amendment with Tyler Technology Inc. for a 5 year extension and additional modules Tyler Payments, Vitals Access, eCertification and Filing Access to the contract not to exceed \$425,000 (Attachment A)

- b) Delegate authority to the Clerk-Recorder Assessor modify the contract up to \$20,000, approximately 5% of the total contract.
- c) Determine pursuant to the California Environmental Quality Act (CEQA) Guidelines Section 15378(b)(5) that the above actions are not a project subject to CEQA review because the actions consist of organizational and administrative activities of governments that will not result in direct or indirect physical changes in the environment.

Summary Text:

The Clerk-Recorder recommends that the Board authorize the attached amendment to extend the contract and for the existing Tyler Technologies, Inc ERM System. In addition, propose to add modules to include: Tyler Payments, Vitals Access, eCertification and Filing Access.

The Clerk-Recorder has used the current system since 5/4/2020 and was able to decrease staff time while also lowering system maintenance costs. Implementation of the Tyler Technologies Inc. ERM System lowered annual maintenance by \$70,000 compared to the prior vendor, and reduced staff time by \$100,000 due to automation. For example, the automated processing for marriage license and ceremonies reduced the processing time from 60 minutes to 30 minutes. The County was able to increase the number of weddings substantially and now is outperforming other counties per capita at a rate of almost 3 times the average weddings.

The ERM System was approved by the Executive Information Technology Committee (EITC) initially on June 5, 2019, with the extension approved on 6/24/2026. The Auditor's Contract Risk Assessment Worksheet identifies this project as a Medium Risk. Vendor Attestation was completed on 6/15/2026.

Discussion:

The Clerk-Recorder is proposing the following new modules which will be paid directly by the customer through convenience fees, except for a one time setup fee which is included in the contract:

- Clerk-Recorder is proposing to add Tyler Payments, which would replace the existing gateway to the ERM System and the merchant account. The current gateway suffers with latency issues and the new gateway is managed directly by Tyler and integrated with many new modules that the Clerk-Recorder would like to implement in a new suite of E-Commerce services. The merchant agreement is authorized separately by the Treasurer.
- Vitals Access is a mobile-friendly, web application that makes it easy for your constituents to request copies of birth, death, and marriage records online instead of manually signing paper, traveling to a notary and then faxing or mailing the physical form. With features like identity verification, document uploads, expedited shipping, and payments, this solution improves efficiency by streamlining processes. Vitals Access - transaction cost per unique record request is \$5, in addition to credit card fees paid directly by customer. ID.Me - Identity Verification is \$5, which is typically less than the average notary fee.
- By offering electronic certifications through E-Certify, customers can significantly enhance their experience by providing a faster, more convenient way to obtain certified copies of documents. These digital copies contain many of the same visual characteristics as a certified copy issued on paper, and constituents no longer need to visit the Clerk-Recorder

to obtain their certified copy. The cost for eCertification - transaction per document requested is \$3.00 paid directly by the customer, plus any direct credit card fees.

- Tyler's Filings Access software is a mobile-friendly, web application that constituents can use to fill out various Clerk forms such as business name registrations (Doing Business As or Fictitious Business Names). The cost for Filing Access - transaction per document/record submitted is \$3.00 paid directly by the customer, plus any direct credit card fees.

Background:

Clerk-Recorder Operations Background

The Clerk-Recorder key duties are to record, archive and provide copies of official records (real estate) and vital records (birth, death and marriage certificates), file fictitious business name statements and notary public oaths, file maps related to real property, issue marriage licenses and file domestic partnerships.

The County Recorder maintains a permanent archive of recorded documents, such as grant deeds, liens and subdivision maps. The Recorder is responsible for examination and recording of documents presented by the public and various government agencies that deal with establishing ownership of land in the County or as required by law.

Tyler's ERM system was initially adopted by the Board on 8/20/2019 and implemented into production on 5/4/2020.

Background on Tyler Technologies, Inc.

Tyler Technologies, Inc., is publicly traded company with 2000+ employees serving the public sector with integrated software and technology services. The ERM solution is a modular system that provides applications to support Recording, Vital Records and Cashiering functions with many automated features to streamline workflow and data capture of data entry by the customer through the use of web forms. Tyler ERM has contracts in 42 counties throughout California, and many more throughout the United States.

Recommendation:

Clerk-Recorder continues to rely heavily on automation to combat rising costs since fees have not been raised since 2010. Additional modules for automation will likely result in reducing staff time by one position.

Performance Measure:

Percentage and number of official documents recorded and indexed the same day. The Clerk-Recorder is required to index records within 48 hours but has the goal to complete indexing within the same day.

Contract Renewals:

Increase contract period by 5 years from 9/1/26-8/31/31.

Fiscal and Facilities Impacts:

Tyler licensing and maintenance is already budgeted in Fund 0050 for FY 26-27. The additional convenience fees to perform the services online are paid directly by the customers. Customers may come into the counter for no additional convenience fee.

Annual Maintenance and Support				
9/1/26 - 8/31/27	9/1/27 - 8/31/28	9/1/28 - 8/31/29	9/1/29 - 8/31/30	9/1/30 - 8/31/31
\$70,421.41	\$73,942.48	\$77,639.61	\$81,521.59	\$85,597.66

Contract amount is not to exceed \$425,000.

Fiscal Analysis:

Funding Source	FYE 2027	FYE 2028	FYE 2029	Total
General Fund				
State				
Federal				
Fees				
Spec. Rev Fund	\$70,421.41	\$73,942.48	\$77,639.61	222,003.50
Total	\$70,421.41	\$73,942.48	\$77,639.61	222,003.50

Staffing Impacts:

Expected decrease in staff time 1.0 FTE, estimated cost reduction of \$100,000 for an Administrative Office Professional.

Position Request Summary:

NA

Special Instructions:

Please send minute order and fully executed agreement to Melinda Greene.

Attachments:

Attachment A –Tyler2ndAmendment (Signature Needed)

Attachment B – Tyler Original Contract

Attachment C – Tyler Amendment 1

Contact Information:

Melinda Greene
 Chief Deputy Clerk-Recorder
 mgreene@countyofsb.org

Certificate Of Completion

Envelope Id: 9C0C4CE0-1CEA-8958-825E-B60C76D4BC85	Status: Completed
Subject: Complete with Docusign: Board Letter - 3rd Amendment to Tyler Technologies	
Source Envelope:	
Document Pages: 4	Signatures: 1
Certificate Pages: 2	Initials: 0
AutoNav: Enabled	Envelope Originator:
Envelopeld Stamping: Disabled	Vanessa
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	105 East Anapamu Street
	Santa Barbara, CA CA 93101
	VGraeff@countyofsb.org
	IP Address: 161.213.76.45

Record Tracking

Status: Original	Holder: Vanessa	Location: DocuSign
7/1/2026 11:29:00 AM	VGraeff@countyofsb.org	

Signer Events

Signer Events	Signature	Timestamp
Joseph E. Holland holland@countyofsb.org County Clerk, Recorder and Assessor Security Level: Email, Account Authentication (None)		Sent: 7/1/2026 11:31:52 AM Viewed: 7/1/2026 11:43:17 AM Signed: 7/1/2026 11:43:33 AM
	Signature Adoption: Pre-selected Style Using IP Address: 68.6.96.26	

Electronic Record and Signature Disclosure:
 Accepted: 7/1/2026 11:43:17 AM
 ID: b2744fed-e6dc-468b-afa7-07c599843b42

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	7/1/2026 11:31:52 AM
Certified Delivered	Security Checked	7/1/2026 11:43:17 AM
Signing Complete	Security Checked	7/1/2026 11:43:33 AM
Completed	Security Checked	7/1/2026 11:43:33 AM

Payment Events	Status	Timestamps

Electronic Record and Signature Disclosure

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

Acknowledging your access and consent to sign documents electronically

To confirm to us that you can access this information electronically, please confirm that you have read this Electronic Record and Signature Disclosure (ERSD), and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access.

By selecting the check-box next to 'I agree to use electronic records and signatures', you confirm that:

- You agree to conduct this transaction by electronic means, including using electronic signatures; and
- Your agreement to conduct this transaction by electronic means is optional and that the transaction has not been conditioned on your agreement to use electronic signatures; and
- You can access and read this ERSD; and
- You can print on paper this ERSD, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access.

Required hardware and software

The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here:

<https://support.docusign.com/guides/signer-guide-signing-system-requirements>