

CITY OF SANTA ROSA
CITY COUNCIL

TO: MAYOR AND CITY COUNCIL
FROM: CLARE HARTMAN, DIRECTOR, PLANNING AND ECONOMIC
DEVELOPMENT DEPARTMENT
SUBJECT: APPROVAL OF BLANKET PURCHASE ORDER WITH BMI
IMAGING SYSTEMS, INC. FOR MICROFICHE CONVERSION
SERVICES OF PLANNING AND ECONOMIC DEVELOPMENT
DEPARTMENT RECORDS

AGENDA ACTION: RESOLUTION

RECOMMENDATION

It is recommended by the Planning and Economic Development and Finance Departments that the Council, by resolution, approve a Blanket Purchase Order for a three-year term with BMI Imaging Systems, Inc., Sunnyvale, CA for microfiche conversions services, for a total contract amount not to exceed \$475,000.

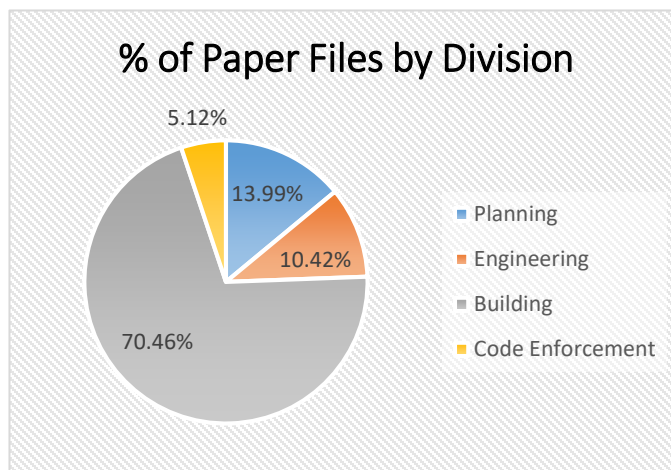
EXECUTIVE SUMMARY

This Blanket Purchase Order provides microfiche conversion services for various Planning and Economic Development Department (PED) divisions. The Planning and Economic Development (PED) Department has approximately 2,000,000 microfiche records, over 86,500 paper files, and thousands of rolled plans dating back over 70 years that require digitization. PED has secured \$900,000 in PG&E funding to address public records management and determined that digitizing the microfiche would provide the most benefit to staff response time and increase in quality of service to the community. Purchasing and PED worked collaboratively to perform a competitive process to solicit and analyze cooperative agreements from 10 jurisdictions, and BMI Imaging Systems, Inc. was selected as the vendor providing best value. Conversion of PED microfiche records aligns with City Council goal of achieving organizational excellence by improving staff response time to public records requests and increasing efficiency in staff research time.

BACKGROUND

The Planning & Economic Development Department (PED) has approximately 2,000,000 historical records in physical microfiche format, along with over 86,500 paper files and thousands of rolled plans dating back over 70 years that require digitization and application of metadata. PED was awarded \$900,000 in PG&E funding to address the need to address public records management for the department. The goal of the project is to develop and implement an action plan to scan, digitize, and quality control public records for PED, thus increasing efficiency, reducing costs of offsite records storage, improving response times for Public Records Act (PRA) requests, and enhancing overall customer service. Information Technology (IT), working with the City Clerk's Office, has a separate "Trusted System and Retention Schedule Update" project using PG&E funding for the implementation of "trusted system" hardware and software, including retention schedule updates well as process and policy development for digitization of documents. Since PED has a high volume of records and is involved with, on average, 80% of all PRA requests, \$36,000 was provided to IT and CCO in support of the establishment of the new "trusted system" and updated records retention schedule.

After a thorough analysis and review of PED's record types in need of digitization, staff determined that digitizing the microfiche would provide the most benefit to staff response time and increase in quality of service to the community since microfiche is frequently reviewed for responsive documents in the majority of PRAs submitted to the department. The overall project to address the entirety of the backlog will take many years to accomplish so staff used \$18,000 to establish a records processing room with four stations to be able to digitize paper files and rolled plans. As a point of reference, it takes approximately 10-20 minutes per paper file to quality check, scan, digitize, and apply metadata, depending on the size and complexity of the file. Staff estimates it will take approximately 28,800 hours to process the backlog of 86,500 paper files located onsite and offsite at Corodata (the City's offsite, long term storage facility). To support this effort, PED is utilizing \$340,000 of the project budget to hire temporary support for two years to provide assistance with addressing the backlog of records. As an example, the following chart reflects the backlog of paper files by division.



Digitization of the microfiche records has been an ongoing effort since September 22, 2015, with \$100,000 approved to digitize approximately 844,000 records. However, the budget was insufficient to complete digitization of all microfiche records and did not include metadata. Advancements in technology now allow for the inclusion of metadata in addition to digitization. Staff reviewed and updated the previous scope of work from 2015 to reflect changes in technology and processes. Under the supervision of the Purchasing Agent, PED staff performed a comparative cooperative agreement competitive process that included over 20 potential vendors but was eventually reduced to four viable options that best aligned with the updated scope of work.

PRIOR CITY COUNCIL REVIEW

Not Applicable.

ANALYSIS

After performing the competitive analysis, BMI Imaging Systems, Inc. was selected by PED staff to be the best value option and was agreed upon by the Purchasing Agent. The cooperative pricing agreement entered into by the City of San Mateo with BMI Imaging Systems, Inc. on December 11, 2019, was used to establish pricing.

On July 11, 2023, after having reviewed the scope of work, BMI Imaging Systems Inc. agreed to honor the per card pricing in the cooperative agreement and issued a response to the scope of work for an amount not to exceed \$475,000. The City's Risk Manager was consulted and determined that this work was permissible to be conducted under a Blanket Purchase Order (BPO). The completion of this project will complete PED's need for microfiche conversion services and fulfills PED's goal to digitize and archive all building, planning, and engineering records dating back to the 1950s.

Scanning Project Goals:

1. Digitize and assign metadata for all microfiche files used by PED personnel for staff research and the completion of public records requests.
2. Align with the City's new trusted system Laserfiche and updated records retention schedule.
3. Reduce the backlog of PED scanning and uploading files into Laserfiche.
4. Integrate advanced technologies to develop digitization processes in support of high-level project priorities and enhanced customer service.
5. Consolidate electronic location of documents and file types into centralized records file management system.

Based upon the expected processing timeframe for digitizing the microfiche and assigning metadata, this request will fully fund the BPO through August 31, 2026.

This cooperative purchase is available for use by the City of Santa Rosa, which is allowed by City Code Section 3.08-160 when advantageous to the City. Under the City's Purchasing Policy, City Code 3-08-110(A) Award Authority, this award requires approval by the City Council.

FISCAL IMPACT

PG&E one-time funding for this project was allocated in the Fiscal Year 2023/24 budget in JL 08064 - PG&E Public Records Management Update.

ENVIRONMENTAL IMPACT

This action is exempt from the California Environmental Quality Act (CEQA) because it is not a project which has a potential for resulting in either a direct physical change in the environment, or a reasonably foreseeable indirect physical change in the environment, pursuant to CEQA Guidelines Section 15378.

BOARD/COMMISSION/COMMITTEE REVIEW AND RECOMMENDATIONS

Not Applicable.

NOTIFICATION

Not Applicable.

ATTACHMENTS

- Resolution / Exhibit A – Microfiche Conversion Scope of Work, BMI Imaging Systems, Inc. Response to Scope of Work

PRESENTER

Serena Lienau, Administrative Services Officer, Planning and Economic Development Department

Brandalyn Tramel, Purchasing Agent, Finance Department