

**COUNTY OF SONOMA
AGENDA ITEM
SUMMARY REPORT**

Clerk of the Board Use Only
Meeting Date / / **Held Until** / /
Agenda Item No: _____ **Agenda Item No:** _____

Department: Information Systems Department

() **4/5 Vote Required**

Contact:
Joyce Sayed

Phone:
(707) 565-5471

Board Date:
5/12/09

Deadline for Board Action:
5/12/09

AGENDA SHORT TITLE:

Agreement for electronic records management software and services.

REQUESTED BOARD ACTION:

Approve and authorize the Chair to execute an Agreement with Zasio Enterprises, Inc, in the amount of \$110,423 to provide electronic records management software and services and to authorize the Information Systems Department Director to amend the Agreement for minor changes which do not significantly change the scope of work or time schedules in a form approved by County Counsel.

CURRENT FISCAL YEAR FINANCIAL IMPACT

EXPENDITURES

ADD'L FUNDS REQUIRING BOARD

Estimated Cost \$ 110,423

Contingencies \$
(Fund Name:)

Amount Budgeted \$
110,423

Unanticipated Revenue \$
(Source:)

Other Avail Approp. \$
(Explain below)

Other Transfer(s) \$
(Source:)

Additional Requested: \$

Add'l Funds Requested: \$

Explanation (if required):

Prior Board Action(s):

None

Alternatives - Results of Non-Approval:

If this Agreement is not approved, Information Systems Records Management Division will continue to use software that is no longer supported and both Records Management and County Departments and Agencies will continue to use a paper based system for transferring records to and from the County Records Center.

Background:

The Information Systems Department's Records Management division provides records management services to County departments, agencies and commissions and some non-County government entities. Records Management develops standard accounting and administrative records retention schedules, as well as specialized departmental schedules. It also operates a full service records center for the physical storage, retrieval and disposition of records. Records Management currently uses a stand-alone DOS based records management system that was developed in 1985.

Legal, audit, operational and historical requirements make the accurate and efficient management of active, inactive and obsolete records a critical business requirement. The current system, written in dBASE3+, no longer meets these needs. Its obsolete technology makes it difficult, if not impossible, to support in a reliable and cost effective fashion. Each time the County upgrades its hardware and/or software, Information Systems staff time is required to ensure that this DOS based program will operate in a modern Windows environment. In addition, portions of the system have repeatedly failed and Information Systems staff has been required to restore lost data and keep dBASE3+ running. A total software failure would be a disastrous situation for the thirty separate departments and outside agencies that rely on Records Management to manage over 41,000 boxes and to maintain departmental records retention schedules. A replacement system is therefore needed.

The current system has limitations on timeliness and accessibility, and requires duplication of effort. Customers manually fill in required paper multi-part forms to request stored files and send them to Records Management via County Courier. In order to keep track of which files are stored in particular boxes customers frequently set up their own spreadsheets, word documents or databases. However, this information may not be updated by the customer. Customers sometimes have difficulty in identifying when files have already been checked out by someone in their department and may request files which are already in their own offices. At the end of each month, hardcopy printouts showing the inventory of boxes currently stored are distributed to each department. These printouts may be hundreds of pages in length and are usually only accessible to one person at a time when multiple customers in a department may need access to them. After a records retention schedule is approved by the Board of Supervisors, it is distributed to the affected department head. However, line staff responsible for implementing the schedule may not always have easy access to the information.

Records Management needs to replace the current antiquated and undependable software with commercially developed software that has strong, flexible, and integrated records management functions. The Information Systems Department is currently implementing a Strategic Plan for Technology.

Attachments:

On File With Clerk:

Agreement with Zasio Enterprises, Inc.

CLERK OF THE BOARD USE ONLY

Board Action (If other than "Requested")

Vote:

Background: (Continued)

This plan identifies Electronic Document Management as key program area. This Electronic Records Management System project is one of several projects within this program's project portfolio and must be capable of integration with future County-wide document management systems and technologies.

Request for Proposals were sent to 19 vendors and proposals were received from DocuSource, O'Neil Software, Tower Software, and Zasio Enterprises, Inc. The proposal received from Zasio was selected because it was most responsive to identified needs and the price of \$110,423 was in line with estimates.

Zasio will provide the County with project management, business and technical analysis, an implementation plan and schedule, software installation and configuration, data conversion and testing, training services and go-live support in addition to software and hardware. The cost of one year of post warranty support services is included in this agreement.

When fully implemented the new system will result in improved operational efficiency and cost savings. In the 2007/2008 fiscal year Records Management used approximately 40,000 pieces of letter size paper and 18,000 pieces of legal size paper for these forms and reports. The new system is web based allowing users to send and retrieve boxes and files, order supplies and view their Records Center inventories from their desktops thus improving accuracy and saving time and paper.

The Information Systems Department requests that the Board approve and authorize the Chair to execute an Agreement with Zasio Enterprises, Inc, in the amount of \$110,423 to provide software and services to manage physical records in both the County Records Center and in County Department and Agency offices and to authorize the Information Systems Department Director to amend the Agreement for minor changes which do not significantly change the scope of work or time schedules in a form approved by County Counsel.