



Camarillo City Council

AGENDA REPORT

Date: November 8, 2023

To: Honorable Mayor and City Councilmembers

From: Greg Ramirez, City Manager

Submitted by: Kristy Buxkemper, City Clerk

Subject: Agreement with Complete Paperless Solutions (CPS) for Laserfiche Cloud Document Management System

BACKGROUND

The City of Camarillo utilizes records management software to electronically store official City records kept in accordance with the City's adopted Records Retention Schedule. Such records are retained in compliance with state requirements for electronic retention.

Since 1995, the City has utilized Questys Solutions, an enterprise document management solution. At the time of its implementation, Questys was one of the programs that met the stringent requirements set by the Association for Information and Image Management and the American National Standards Institute for recording, storing, and reproducing permanent and nonpermanent documents or records in electronic media.

The State of California's requirements for the electronic storage of official records, set forth in *California Code Regulations, Title 2, Section 22620.7*, are based on these standards. Systems that meet these standards are known as "trusted records systems," as they can be relied upon to store records in an unalterable electronic format that can legally be considered "true and original." The current system is used by staff citywide and is relied upon to safeguard the City's records.

DISCUSSION

Over the years, other records management systems have emerged that meet the State of California's requirements for a trusted system, and which provide extensive capabilities not available with the City's current records management system (Questys). Functions such as improved search terms to easily locate stored documents, a public-facing portal which would allow for select records to be available and accessible to the public, as well as the ability to build in the City's records retention schedule to ensure document retention matches the legal requirements. These functions are increasingly necessary to provide

an effective system for City staff as the number of electronic records maintained by City has significantly increased due to digitization efforts and retention of electronic records.

Several other available systems were analyzed to compare various records management solutions to ensure selection of the most efficient system to meet the City's needs. Of the available options, staff has identified Laserfiche, an enterprise content management software solution, as providing the best platform for secure storage and retrieval of records. Laserfiche is a trusted records management solution for government agencies and is specifically designed to comply with all the statutory requirements for a trusted records system. Laserfiche is utilized by numerous other Ventura County cities and would provide the City with an upgraded solution for archiving, locating, sharing, and storing City records.

City of Camarillo Policy 4.01 pertaining to Procurement provides that the City may participate in a collective bidding process established by other governmental agencies for cooperative purchasing. Services for the Laserfiche records management solution may be purchased through the National Cooperative Purchasing Alliance (NCPA) Contract No. 01-158 with Compulink Management Center, Inc. (dba Laserfiche). The cooperative agreement was awarded based on a competitive Request for Proposals (RFP) that is substantially consistent with the City's request for proposal procedures.

Laserfiche is distributed via authorized resellers under which Complete Paperless Solutions (CPS) is a platinum, certified solution provider and is affiliated with the NCPA Cooperative Agreement. CPS has submitted a proposal to provide the City with the Laserfiche Records Management Solution pursuant to the negotiated terms of the NCPA Contract No. 01-158, and will provide software implementation, data conversion, training, support, and other services.

CPS offers a managed cloud-based configuration of Laserfiche, which is designed to be accessed from both desktop and mobile devices and provides a robust search function to help internal users quickly find the documents, improving daily efficiencies. Importantly, Laserfiche also includes options to provide the public with access to records through the web via a searchable interface, which can promote transparency and reduce the number of public record requests received. This public portal is completely customizable with security measures in place to ensure proper permissions and defined access for public records.

Staff believes the Laserfiche system is the most comprehensive and cost-efficient records management solution. The expenditure of additional time and money to conduct a formal request for proposals would not yield results more advantageous to the City than what has been proposed by CPS. The implementation of a new records management software is a critical component of the City's efforts to update the Records Management Program which includes a full digitization of records with the ultimate goal of a paperless workplace.

Lastly, the proposed agreement with CPS will include the conversion of data from the City's current records repository (Questys) to Laserfiche, as they have extensive

experience with similar migrations. This will include technical support, software updates, and guaranteed response times to address any system configuration or performance needs.

It is recommended that the City Council approve the agreement with CPS for the implementation of Laserfiche to support the City's digitization goals, increase internal efficiencies, and provide additional public transparency.

Staff has negotiated a Scope of Services and Fee Schedule and recommends approving a standard Professional Services Agreement with Complete Paperless Solutions in an amount not-to-exceed \$143,034 and authorizing contingency in the amount of \$14,303 (10%) for a total agreement authorization of \$157,337. The proposed agreement has a term of 3 years with the option to extend the agreement for up to two (2) one-year extensions.

Fiscal Year	Annual Cost
FY 2023/24	63,581
FY 2024/25	39,305
FY 2025/26	40,148
Contract Total	143,034
10% Contingency	14,303
Total Authorized Expenditure	157,337

FISCAL IMPACT

Funds for the Laserfiche Cloud Document Management System are included in the Information Systems Administrative budget, Account No. 530-5330-453-3201.

CEQA DETERMINATIONS

City staff has determined, in accordance with Section 15061(b)(3) of the California Environmental Quality Act (CEQA) Guidelines, that the agreement for the Laserfiche Cloud Document Management solution is not subject to CEQA review because it can be seen with certainty that there is no possibility that the execution of the contract may have a significant effect on the environment.

RECOMMENDATION

1. Authorize the City Manager to execute Professional Services Agreement No. 2023-137 with Complete Paperless Solution in the amount of \$143,034 for the

Laserfiche Cloud Document Management System and authorize a contingency in the amount of \$14,303 for a total agreement authorization of \$157,337.

2. Authorize City Manager to execute future amendments to the agreement for unforeseen additional services up to the authorized contingency amount.

ATTACHMENTS

1. CC Agreement 2023-137 with Complete Paperless Solutions (CPS)
2. National Cooperative Purchasing Alliance (NCPA) Contract No. 01-158 with Compulink Management Center, Inc. (dba. Laserfiche) / Cooperative Purchasing Agreement

REFERENCE MATERIALS – AVAILABLE FOR REVIEW AT CITY HALL

None