

D. Amendments to Agreements with Complete Paperless Solutions (CPS), Gladwell Government Services, Inc. (GGS), and Archer Street, LLC for Citywide Digitization and Transparency Program

Recommendation:

1. Authorize the City Manager to execute Agreement Amendment No. 2023-157A with Complete Paperless Solutions (CPS) for on-going Laserfiche implementation, configuration and training, records management setup in an amount not-to-exceed \$178,937;and
2. Authorize the City Manager to execute Agreement Amendment No. 2024-153A with Archer Street, LLC for project management consultant services in an amount not-to-exceed \$137,200; and
3. Authorize the City Manager to execute Agreement Amendment No. 2023-156B with Gladwell Government Services, Inc. (GGS) in an amount not-to-exceed \$100,470; and
4. Authorize the City Manager to execute future amendments to the agreements for unforeseen additional services up to the authorized contingency amount; and
5. Authorize an appropriation of \$201,270 for the agreement amendments for the Citywide document management and digitization project in Information Systems Administrative account, No. 530-5330-453.32-01 from available Information Systems Fund Balance.



Camarillo City Council

AGENDA REPORT

Date: January 8, 2025

To: Honorable Mayor and City Councilmembers

From: Greg Ramirez, City Manager

Submitted by: Mitchell Cameron, Director of Administrative Services/Chief Innovation Officer

Subject: Amendments to Agreements with Complete Paperless Solutions (CPS), Gladwell Government Services, Inc. (GGS), and Archer Street, LLC for Citywide Digitization and Transparency Program

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. Over time, other records management systems have emerged that provide expanded capability and functionality while complying with State electronic record storage regulations.

In coordination with the City's effort to modernize the management of existing electronic documents, focus was also trained on digitizing all paper records, which will allow for increased electronic availability and public accessibility, as well as reduce waste and decrease onsite and offsite storage.

On September 13, 2023, the City Council approved award of a contract with Isausa, Inc. for scanning, indexing, and quality control services for all existing paper documents.

On November 8, 2023, the City Council approved a Professional Services Agreement with Complete Paperless Solutions (CPS) for the implementation of Laserfiche to support

the City's digitization goals, increase internal efficiencies, and provide additional public transparency.

DISCUSSION

The Citywide Digitization and Transparency Program is a transformative effort to consolidate and optimize multiple ongoing projects. The program is a multi-year effort requiring a coordinated approach across departments and the expertise of specialized consultants. Phase 1 focuses on migrating electronic records from Questys to Laserfiche and scanning paper records into the new system. These tasks are critical for establishing a centralized, efficient, and compliant document management framework. As part of the Citywide Digitization and Transparency Program, significant progress has been made in achieving the project's goals. Key accomplishments include:

- Successfully converting data from Questys to Laserfiche, ensuring seamless access to historical records in the new system.
- Scanning and indexing a substantial volume of files, including legally sensitive and large-format plan files.
- Developing a comprehensive project charter to guide the program's scope, goals, and milestones.
- Providing training sessions for records managers across departments to ensure effective use of the Laserfiche system and alignment with the City's records retention policies.

These achievements represent foundational steps in the City's broader effort to modernize its records management practices and enhance transparency.

To maintain progress and momentum, staff recommends amending agreements with CPS, GGS, and Archer Street, LLC to address ongoing project needs and ensure adequate resources for completion. Additionally, as scanning and digitization efforts evolve, there may be a need to seek further Council approval for resources to address higher than anticipated volumes of paper records.

Future phases of this program will focus on optimizing Laserfiche functionality, improving workflows, and incorporating GIS-enabled records. These enhancements are expected to further improve operational efficiency, compliance, and transparency. Staff will return to Council with detailed proposals for these next steps, ensuring alignment with project objectives and the City's long-term modernization goals.

By systematically pursuing these improvements, the City aims to build a scalable and sustainable records management system that enhances public service delivery and operational effectiveness.

Staff's recommended amendments to the consultant agreements are as follows:

Consultant	Current Authorized Expenditure	Recommended Amendment	20% Contingency	Total Authorized Expenditure
Complete Paperless Solutions (CPS)	\$157,337	\$18,000	\$3,600	\$178,937
Gladwell Government Services, Inc. (GGS)	\$30,000	\$58,725	\$11,745	\$100,470
Archer Street, LLC	\$28,000	\$91,000	\$18,200	\$137,200

FISCAL IMPACT

An appropriation of \$201,270 for the agreement amendments for the Citywide document management and digitization project in Information Systems Administrative account, No. 530-5330-453.32-01 from available Information Systems Fund Balance is required.

CEQA DETERMINATIONS

City staff has determined, in accordance with Section 15061(b)(3) of the California Environmental Quality Act (CEQA) Guidelines, that the Citywide document management and digitization project is not subject to CEQA review because it can be seen with certainty that there is no possibility that the Citywide document management and digitization project may have a significant effect on the environment.

RECOMMENDATION

1. Authorize the City Manager to execute Agreement Amendment No. 2023-157A with Complete Paperless Solutions (CPS) for on-going Laserfiche implementation, configuration and training, records management setup in an amount not-to-exceed \$178,937; and

2. Authorize the City Manager to execute Agreement Amendment No. 2024-153A with Archer Street, LLC for project management consultant services in an amount not-to-exceed \$137,200; and

3. Authorize the City Manager to execute Agreement Amendment No. 2023-156B with Gladwell Government Services, Inc. (GGS) in an amount not-to-exceed \$100,470; and

Amendments to Agreements for Digitization Project

January 8, 2025

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4. Authorize the City Manager to execute future amendments to the agreements for unforeseen additional services up to the authorized contingency amount; and

5. Authorize an appropriation of \$201,270 for the agreement amendments for the Citywide document management and digitization project in Information Systems Administrative account, No. 530-5330-453.32-01 from available Information Systems Fund Balance.

ATTACHMENTS

1. CC Agreement 2023-157A with Complete Paperless Solutions (CPS)
2. CC Agreement 2024-153A with Archer Street, LLC
3. CC Agreement 2023-156B with Gladwell Government Services, Inc. (GGS)

REFERENCE MATERIALS – AVAILABLE FOR REVIEW AT CITY HALL

None

AGREEMENT NO. 2024-157A

AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT

The First Amendment to Agreement No. 2024-157 (Amendment) is entered into between the City of Camarillo, a California general law city and municipal corporation (City), and Complete Paperless Solutions (collectively referred to as the Parties). The effective date of this Amendment is January 8, 2025.

RECITALS

A. On November 13, 2023, the City Manager approved Professional Services Agreement No. 2024-157 with Complete Paperless Solutions for software, implementation, configuration and training, records management setup for all departments, migration of current records from Questys to Laserfiche, and VIP support. in the amount of \$157,337. The Agreement is designated as CC Agreement No. 2024-157.

B. All capitalized terms not defined in this Amendment have the meaning set forth in the Agreement.

Section 1. Compensation and Payment. The First Amendment to the Agreement is for a not-to-exceed amount of \$21,600, for a total agreement amount of \$178,937.

Section 2. Continuation of Terms of Agreement. Except as expressly modified by the terms and provisions of this document, the remaining terms and provisions of the Agreement remain in full force and effect.

THE AUTHORIZED REPRESENTATIVES of the Parties have caused this Amendment, Agreement No. 2024-153A, to be executed as of the Effective Date.

CITY OF CAMARILLO

Greg Ramirez, City Manager

ATTEST:

City Clerk

Complete Paperless Solutions

Jamie Dunn

Jamie Dunn, Vice President

Title	City of Camarillo - Agreement Amendment 2024-157A
File name	2._CC_2023-157A_CPS.docx
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SENT

12 / 13 / 2024

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Sent for signature to Jamie Dunn (jdunn@cps247.com) from bdame@cityofcamarillo.org
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VIEWED

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SIGNED

12 / 13 / 2024

23:05:08 UTC

Signed by Jamie Dunn (jdunn@cps247.com)
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COMPLETED

12 / 13 / 2024

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AGREEMENT NO. 2024-153A

AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT

The First Amendment to Agreement No. 2024-153 (Amendment) is entered into between the City of Camarillo, a California general law city and municipal corporation (City), and Archer Street, LLC (collectively referred to as the Parties). The effective date of this Amendment is January 8, 2025.

RECITALS

A. On August 1, 2024, the City Manager approved Professional Services Agreement No. 2024-153 with Archer Street, LLC for information technology project management services in support of the City's digitization project in the amount of \$28,000. The Agreement is designated as CC Agreement No. 2024-153.

B. Pursuant to Section 1 of the Agreement, the parties wish to extend the term of the Agreement for an additional term of 52 weeks.

C. All capitalized terms not defined in this Amendment have the meaning set forth in the Agreement.

Section 1. Compensation and Payment. The First Amendment to the Agreement is for a not-to-exceed amount of \$109,200, for a total agreement amount of \$137,200.

Section 2. Term of the Agreement. The term of the Agreement is extended for an additional 52-week period, from January 8, 2025 through January 7, 2026.

Section 3. Continuation of Terms of Agreement. Except as expressly modified by the terms and provisions of this document, the remaining terms and provisions of the Agreement remain in full force and effect.

THE AUTHORIZED REPRESENTATIVES of the Parties have caused this Amendment, Agreement No. 2024-153A, to be executed as of the Effective Date.

CITY OF CAMARILLO

Greg Ramirez, City Manager

ATTEST:

City Clerk

Archer Street, LLC



Tony Rice II, Chief Executive Director

Attachments: Exhibit 1, Project Estimate

Title	City of Camarillo - Agreement Amendment 2024-153A
File name	5._CC_2024-153A_Archer_Street_LLC.docx
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Sent for signature to Tony Rice II (tony@archerstreet.com) from bdame@cityofcamarillo.org
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Signed by Tony Rice II (tony@archerstreet.com)
IP: 75.82.139.224



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AGREEMENT NO. 2023-156A

AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT

This First Amendment to Agreement No. 2023-156 is entered into between the City of Camarillo, a California general law city and municipal corporation (City), and Gladwell Government Services, Inc. (collectively referred to as the Parties). The effective date of this Amendment is August 1, 2024.

RECITALS

A. On October 25, 2023, the City entered into an Agreement with Gladwell Government Services, Inc., for records retention-related assistance to analyze, review, and update the City's Records Retention Schedule, and to provide training and other services related to the management and retention of all City's records.

B. All capitalized terms not defined in this Amendment have the meaning set forth in the original Agreement.

Section 1. Amendment. The Agreement is amended to extend the scope and budget of the agreement as follows:

- a) **Collaboration and Coordination:** The consultant will work closely with both the scanning project manager and the Laserfiche project manager to ensure successful implementation and compliance with records retention requirements. This includes regular meetings, action plans, progress updates, and addressing departmental misconceptions.
- b) **Misconception Resolution:** Identify and clarify misconceptions related to scanning and digitization processes within various departments. The consultant will educate staff on accurate record-keeping practices and ensure a clear understanding of records retention needs.
- c) **Development of Crosswalk Table:** Create a comprehensive crosswalk table to map out the current and future locations of prioritized records, ensuring a smooth transition and proper organization in the new system. This table will align with the records retention schedule. Review information and records in current various systems and provide recommendations to ensure retention in trusted systems.
- d) **Detailed Project Scope and Assessment:** Conduct a thorough assessment of the current status of the Scanning and Laserfiche projects. The consultant will prioritize next steps, determine the volume of records, develop a phasing plan, review legal requirements, assist staff with determining retention and indexing values, review and organize electronic server files, and make strategic adjustments based on feedback from key stakeholders.
- e) **Training and Workflow Optimization:** Provide training on records management, including best practices for file naming conventions and compliance with the records retention schedule. Design or redesign workflows, templates, and file organization to reduce employee workloads and ensure consistent practices across departments.
- f) **Reports and Recommendations:** Provide reports and comprehensive recommendations based on assessments, training sessions, and interactions with department staff and project managers.
- g) **Total Compensation:** The Agreement is amended to increase the total compensation under this agreement, including reimbursement for actual expenses, to not exceed \$12,000 for a contract total of \$30,000.

Section 2. Continuation of Terms of Agreement. Except as expressly modified by the terms and provisions of this document, the remaining terms and provisions of the Agreement remain in full force and effect.

THE AUTHORIZED REPRESENTATIVES of the Parties have caused this Amendment, Agreement No. 2023-156A, to be executed as of the Effective Date.

CITY OF CAMARILLO

Gladwell Government Services, Inc:

Sign: *Diane R Gladwell*

Greg Ramirez, City Manager

Name: Diane R. Gladwell

Title: President

Date: 8/1/2024

ATTEST:

City Clerk

EXHIBIT A – SCOPE OF WORK

PROPOSAL FOR CITY OF CAMARILLO SCOPE OF WORK INFORMATION & RECORDS MANAGEMENT RETENTION PROJECTS

All services will incorporate Best Practices of over 250 other California cities and legal requirements for California cities.

Gladwell Governmental Services, Inc. (GGS) will provide all services by video conferences. Diane R. Gladwell, the President of GGS (Gladwell Governmental Services, Inc.) will provide all deliverables under the direction of the City, which may include:

Hourly rate: \$135/hr

Interaction with Scanning Project Manager and Laserfiche Project Manager

The consultant will work closely with both the scanning project manager and the Laserfiche project manager to ensure the successful implementation of the digitization projects and repository system, ensuring compliance with records retention. This includes regular meetings, updates on progress, and collaboration on overcoming challenges and addressing any misconceptions within the departments.

Addressing Misconceptions

Identify and address misconceptions related to the scanning and digitization process within various departments relating to records retention. This includes clarifying issues such as check scanning and the importance of consistent and accurate record-keeping practices. The consultant will work closely with the departments to ensure a clear understanding of the processes and requirements and retention needs for the various record types.

Development of Crosswalk Table

The consultant will develop a comprehensive crosswalk table for selected, prioritized records to be stored electronically in Trustworthy locations where records are currently stored or created and where they will be relocated. This table will serve as a guide to ensure a smooth transition and proper organization of records in the new system and will be in compliance with the records retention schedule.

Detailed Scope of Work:

Assessment of Current Project Status- Conduct a thorough assessment of the current status of the Scanning Project and the Laserfiche Records Repository Project and assess the development of workflows and systems to meet records retention requirements.

Prioritization of Next Steps

- Help determine the scope of the projects.
- Assess and determine the volume of each record series.
- Identify which record series are to be included in the digitization process.
- Develop a prioritization and/or phasing plan for the projects; attend department meetings with Laserfiche for system development
- Review legal requirements, workflows, and provide recommendations on the Quality Check process to reduce employee workloads.
- Facilitate open discussions with key stakeholders to align project goals with organizational objectives and address high-level concerns. Establish a feedback loop to gather and integrate input from the steering committee into project execution.

- Make strategic adjustments to the project plan based on feedback and evolving project dynamics to ensure alignment with the city's broader goals obtained through communication with the City Manager and Steering Committee. Maintain comprehensive documentation of all communications, decisions, and strategic adjustments for transparency and future reference.

Videoconference Meetings with Subject Matter Experts- Conduct videoconference meetings with subject matter experts from select departments. Provide additional training on what records need to be scanned and why (in compliance with the records retention schedule), addressing misconceptions and ensuring records stored in different systems are recognized as "trusted systems."

Template Design / Re-Design- Design or redesign templates, including indexing requirements for each record series (for scanning and for Laserfiche templates).

Folder Design- Develop a detailed index of record types, including where they are currently stored/created and where they will be relocated (e.g., Laserfiche, server drive).

File Naming Conventions- Develop and provide training for departments on best practices for file naming conventions, aiming for consistency across departments.

Electronic Server Files- Review electronic server files, including the City common drive, to clean up and organize electronic records. Assist in determining which records in server files need to be transferred to Laserfiche for records retention.

Workflow Design / Re-design- Design or redesign workflows to reduce employee workloads.

Interface with Vendors / Agendas Prior to Meetings

Project Management / Action Plans

Recommendations - Provide comprehensive recommendations based on assessments, training sessions, and interactions with department staff and project managers.

Reporting - Provide reporting on progress/updates.

Total Not to Exceed: \$12,000