



BOARD OF SUPERVISORS
AGENDA LETTER

Agenda Number:

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

Department Name: Clerk-Record-Assessor
Department No.: 062
For Agenda Of: 05/20/2008
Placement: Administrative
Estimated Tme:
Continued Item: No
If Yes, date from:
Vote Required: Majority

TO: Board of Supervisors

FROM: Department Joseph E. Holland (805) 568-2558
Director(s)
Contact Info: Brian M. Richard (805) 568-3371

SUBJECT: Purchasing Bid Waiver Request

County Counsel Concurrence

As to form: No

Other Concurrence: Purchasing

As to form: Yes

Recommended Actions:

That the board of Supervisors:

Authorize the County Purchasing Agent to procure the Laserfiche document management software from Datanet Solutions (not a local vendor) primarily for the Assessor Office without being required to conduct a formal bid.

Summary Text:

The Assessor's office has approximately 127,000 hard copy residential property files and 25,000 commercial files, each of which contains numerous paper documents. These documents not only include historical, but also current active documents; all of which are necessary archival documentation for each residential property. Currently, these files reside in three different offices throughout the County, thus making them difficult to centralize.

Our goal is to digitize these files and make them more easily managed and accessible for the assessor department staff, other county departments, and the citizens of our County. A document management system (DMS) that manages, tracks and stores electronic documents, would allow the files to be more portable, easily organized and secure and it would enable us to retrieve, manage and integrate these documents into our business processes.

Auditor-Controller Concurrence

As to form: No

As a result of identifying our need for a DMS, we looked at in-depth and requested proposals from, five document management software systems that met our criteria. Over the course of several months, our due diligence also included surveying a number of other county assessors throughout the state and other agencies to discover what types of DMS are being used and specifically which vendor software was implemented. In addition, we performed extensive online research of DMS systems and their pros and cons. We have concluded that Laserfiche met and exceeded our strict criteria and requirements. Therefore, pursuant to County Code 2-39, the department is requesting your board to waive the competitive bid process for the purchase of a document management system from Datanet Solutions not to exceed \$50,000 for implementation of software and consulting.

Background:

A document management system (DMS) is a computer system used to track and store electronic documents and/or images of paper documents. A DMS addresses and handles the electronic creation, location, filing, retrieval, security, disaster recovery, policy enforcement – retention, distribution, workflow of a document through its life-cycle. There are numerous benefits of using a DMS most notably is the staff time savings in managing paper files, increased communication, accessibility, and portability of information, physical storage space, and compliance with policy, rules and regulations.

Performance Measure:

Fiscal and Facilities Impacts:

Budgeted: Yes The cost associated with this bid waiver is included in the Clerk-Recorder-Assessor’s Fiscal Year 2007-08 Adopted Budget.

Fiscal Analysis:

<u>Funding Sources</u>	<u>Current FY Cost:</u>	<u>Annualized On-going Cost:</u>	<u>Total One-Time Project Cost</u>
General Fund	\$ 50,000.00		
State			
Federal			
Fees			
Other:			
Total	\$ 50,000.00	\$ -	\$ -

Narrative:

Staffing Impacts:

Legal Positions:

FTEs:

Special Instructions:

Return a copy of the minute order to Rose Rodarte in the Clerk-Recorder-Assessor Department and John McMillan in Purchasing

Attachments:

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None

Authored by:

Brian Richard, CRA IT Manager

cc: