

Agenda Report

June 12, 2023

TO: Honorable Mayor and City Council

FROM: Department of the City Clerk

SUBJECT: AUTHORIZATION TO ENTER INTO A CITYWIDE CONTRACT WITH URM TECHNOLOGIES, INC., TO PROVIDE DOCUMENT DIGITIZING SERVICES FOR CITY RECORDS IN AN AMOUNT NOT-TO-EXCEED \$462,000 FOR A THREE-YEAR PERIOD; AND WITH TWO OPTIONAL ONE-YEAR EXTENSIONS IN THE AMOUNT OF \$134,000 FOR EACH YEAR, FOR A TOTAL FIVE-YEAR CONTRACT NOT-TO-EXCEED AMOUNT OF \$730,000

RECOMMENDATION: It is recommended that the City Council:

1. Find that the proposed contract is exempt from the California Environmental Quality Act (CEQA) pursuant to State CEQA Guidelines Section 15061(b)(3), the "Common-Sense" exemption that CEQA only applies to projects that may have an effect on the environment; and
2. Authorize the City Manager to enter a contract, as a result of a competitive selection process as specified by Pasadena Municipal Code, Section 4.08.047, with URM Technologies, Inc., to provide document digitizing services for City records in an amount not-to-exceed \$462,000 for a three-year period; with two one-year optional extensions of \$134,000 each year, for a total contract not-to-exceed amount of \$730,000. Competitive bidding is not required pursuant to the City Charter Section 1002(F), contracts for professional or unique services.

BACKGROUND:

Prior to May 2018, City departments were utilizing individual purchase orders with multiple vendors to contract for document scanning and digitizing services. As part of an effort to consolidate this work under one vendor (for efficiency and as a cost-saving strategy), the City Clerk's Office issued a Request for Proposals (RFP) for digitizing City records to electronic format on a citywide basis. Following an RFP process, on May 14, 2018, the City Council approved a contract with Matrix Imaging Products, Inc., that provided citywide document conversion support to several City departments. At the end of the current fiscal year, the five-year contract with Matrix will expire. The City Clerk's Office has prepared and issued another RFP, scored proposals submitted, and is recommending that a new contract with URM Technologies, Inc., be awarded for similar digitizing services for the next three years, with two optional one-year renewals.

Consistent with records management best practices, staff continues to aggressively pursue the digitization of paper records to electronic format. Records conversion provides several benefits: it preserves important documents (paper documents age and degrade over time), provides savings in terms of costs and storage space of physical documents, and increases accessibility to City records by allowing City staff to locate documents in the City’s virtual records center quickly and at their computer. To understand the scope of digitization services needed for the new contract on a citywide basis, the Records Management Division sent out an invitation to all departments and then met with interested City staff from the departments listed below as part of the preparation for the RFP:

1. Planning & Community Development
2. Human Resources
3. City Manager – Redevelopment
4. Police Department
5. Parks Recreation & Community Services
6. City Clerk
7. Public Health
8. City Attorney

Based on discussions and submitted information, it was determined that document conversion needs on a citywide basis could exceed 2.5 million pages over the next three to five years. Document types for conversion include Building Plans, Plan Check Drawings, Permits, and various types of City administrative files. Upon establishing the scope of work, the Records Management Division developed the parameters of the services needed and prepared the RFP for citywide records digitization services.

Department	Department Records Series Titles	File/Count	Page/Counts
City Attorney	Liability Claim Files	270	26,000
City Clerk, Other Dept Files	Records Center Files	200	195,000
City Manager	Redevelopment Files	200	11,000
Health	Health Plan Check Drawings	240	7,000
Human Resources	Terminated Employee Benefit Files	100	5,200
Human Resources	Terminated Employee Files	100	4,300
Human Resources	Workers Compensation Files	100	192,000
Parks, Community Services	Commission Minutes and Agendas	30	2,500
Planning	Building Plans	23,000	250,000
Planning	Building Permits	30,000	1,025,000
Planning	Planning Files	500	200,000
Police	Police Case Files	3,000	641,000
		Total Pages	2,559,000

In collaboration with the Purchasing Division, the Records Management issued the RFP on March 6, 2023. In addition to the typical outreach associated with the City's RFP process, City Clerk staff located and individually contacted 53 local vendors with stated experience in document digitization of paper records to notify them of the RFP process, answer questions, and encourage their participation. Following staff's outreach, 9 local vendors initially expressed interest in responding to the RFP, and 1 local vendor attended a non-mandatory bid meeting. However, despite these outreach efforts to help encourage local participation, there were no local vendors included as part of the 7 proposals received by the City.

A total of 7 proposals were received and considered responsive:

Vendor Name	Score
URM Technologies, Inc.	62.75
Matrix Imaging Products, Inc.	61
ViaTRON Systems, Inc.	58.75
Omni Pro Inc.	57.5
FILE KEEPERS, LLC	52.5
Legal Vision Group, LLC	45.5
Property Insight, LLC	40.75

Departmental Staff met and independently evaluated the proposals based on the criteria set forth in the RFP. Then, an evaluation committee was established with representatives from user departments, Records Management, and Purchasing. Evaluators reviewed each proposal, checked relevant experience, and calculated proposal costs on a comparative basis and based on existing submitted information, including criteria such as volume capacity, specifications, and schedules.

Staff has determined the proposal submitted by URM Technologies, Inc., best meets the City's requirements. Based on the City's records volume and conversion history, and the information received in the proposal, URM Technologies, Inc., is therefore recommended for award of the proposed contract.

COUNCIL POLICY CONSIDERATION:

This action supports the City Council's strategic goal to maintain fiscal responsibility and stability.

FISCAL IMPACT:

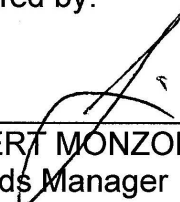
The cost for the proposed action to approve the staff recommendation will be approximately \$730,000 over five years. Funding for this action will be addressed by utilization of existing budgeted appropriations in various other contract services accounts within the various participating departments.

Respectfully submitted,



MARK JOMSKY
City Clerk

Prepared by:



ROBERT MONZON
Records Manager

Attachment A – TPA Form for URM Technologies, Inc.

Attachment B – TPA Forms for non-selected vendors