

**MEMORANDUM
ADMINISTRATIVE SERVICES DEPARTMENT
COUNTY OF PLACER**

TO: Honorable Board of Supervisors

FROM: Clark L. Moots, Director of Administrative Services

DATE: May 8, 2007

SUBJECT: Approve the award of Request for Proposal (RFP) Number 9613 to LR Hines Inc. for the purchase of the SIRE Technologies Document Management System; and authorize the Purchasing Manager to execute related agreements in the maximum amount of \$716,265.

ACTION REQUESTED

Approve the award of Request for Proposal (RFP) Number 9613 to LR Hines Inc. of Roseville, California for the purchase of the SIRE Technologies Document Management System; and authorize the Purchasing Manager to execute related agreements in the maximum amount of \$716,265.

BACKGROUND

Electronic Document Management Systems (EDMS) are designed to create, store, and retain digital copies of paper records. These records (which can include supplementary non-paper files such as audio and video recordings, spreadsheets, or virtually any electronic file type) are "indexed" with descriptive tags that make them quick and easy to retrieve. This type of system is widely used in government and private enterprise to improve the management of work processes, comply with legislation, accommodate internal information needs, improve customer service, increase productivity, and expand the internal flow of information.

There is a growing need for Placer County to archive documents in a more efficient manner and to retrieve and print documents and maps in a timely fashion for all departments. The intent of this proposed system is to enable the County to expand its ability to store an increased number of documents on-line and reduce the amount of physical storage space required for the most commonly-retrieved documents.

At the request of the County Executive Office, Administrative Services worked with several county departments to compile a detailed list of functional requirements for implementation of a Countywide Document Management System. These functional requirements resulted in RFP 9613 that was released in August of 2006. The Procurement Services Division coordinated the RFP selection team in the evaluation of the twelve vendor proposals received. After an exhaustive review of the vendor's proposal responses, the vendors were "short-listed" to a group of five. This group of vendors was invited to demonstrate the product(s) described in their respective proposals. One of the vendors withdrew their proposal at this point. At the end of this process, the evaluation team unanimously

agreed that two of the vendors would best meet the needs of the County. The panel conducted site visits with clients of both of the remaining vendors. As the result of these visits, and based on the cumulative review and information gathered throughout this extensive evaluation, the evaluation panel determined that the SIRE Technologies software product implemented by LR Hines, Inc. was clearly the one that best satisfied the functional and technical requirements of the County.

This project is planned to be implemented in three distinct phases: Phase I will be for the pilot group consisting of the Community Development Resource Agency (CDRA) departments of Building, Engineering & Surveying, Planning, and Environmental Health. This phase will be implemented in approximately six months and will enable this pilot group of departments to scan and index their current documents on-site.

Phase II will allow the CDRA pilot departments to have all of their historical documents scanned offsite by a vendor and then transferred into the system for their use. Due to the large volume of documents that are required to be prepared for scanning and then to be scanned, it is estimated that this phase could take from twelve to eighteen months to complete.

Phase III will allow all other County departments to join the system. Any additional hardware, software, and historical scanning costs relating to these departments will be determined once the participating departments are identified.

We respectfully request your Board's approval to purchase the SIRE Technologies Document Management System.

FISCAL IMPACT

There will be a one-time cost of \$716,265 and annual on-going costs averaging \$42,013 per year, for Phase I and Phase II of this project. Funds for the acquisition of the SIRE Technology Document Management System have been budgeted within the Countywide System Fund for FY06/07.

Respectfully submitted,



Clark L. Moots
Director of Administrative Services

CC: Tom Miller, County Executive Officer
Rich Colwell, Chief Assistant County Executive Officer
Mike Boyle, Assistant County Executive Officer
Holly Heinzen, Assistant County Executive Officer
Allison Carlos, Principal Management Analyst
David Seward, Purchasing Manager

Contract for Review at the Clerk of the Board