SUBJECT: Award of Proposal No. 20-093P, Implement Content Manager for Managing Electronic Records to Information First, Inc., for the contract amount of $238,224.08.

AGENDA OF: March 3, 2020

ASSEMBLY ACTION:

MANAGER RECOMMENDATION: Present to the assembly for consideration.

APPROVED BY JOHN MOOSEY BOROUGH MANAGER: _____

Route To:	Department/Individual	Initials	Remarks
	Purchasing Officer	*(signed)*	
	IT Director	*(signed)*	
	Records Management Officer	*(signed)*	
	Finance Director	*(signed)*	
	Borough Attorney	NS	
	Borough Clerk	*(signed)* 2/28/20	

KBJ 2.24.20

ATTACHMENT(S): Fiscal Note: Yes __X__   No _____
Scope of Services   (2p)

SUMMARY STATEMENT: On January 23, 2020, the Matanuska-Susitna Borough Purchasing Division issued a solicitation requesting Proposals from qualified firms to manage the implementation of a change management plan, business process review analysis, workshops and training 40 departments/divisions (up to 350 employees) to manage electronic records. See scope of services for more detailed information.

In response to the advertisement, one proposal was received. The Borough Clerk and the Records Management Officer evaluated the proposal and determined that Information First, Inc. would be most advantageous for the Borough.

The contract period of performance begins on upon contract execution and ends on December 18, 2020.

In accordance with MSB 3.08.170(B), Administration requests authority to modify the resulting contract completion date by 30 days for unforeseen circumstances.

The Clerks Department, Records Management Division will be administering the contract.

RECOMMENDATION OF ADMINISTRATION: Award of **PROPOSAL NO. 20-093P, IMPLEMENT CONTENT MANAGER FOR MANAGING ELECTRONIC RECORDS** to **INFORMATION FIRST, INC.** for the contract amount of **TWO HUNDRED THIRTY EIGHT THOUSAND TWO HUNDRED TWENTY FOUR AND 08/100 DOLLARS ($238,224.08)**.

MATANUSKA-SUSITNA BOROUGH
FISCAL NOTE

Agenda Date: March 3, 2020

SUBJECT: Award of Proposal No. 20-093P, Implement Content Manager for Managing Electronic Records to Information First, Inc., for the contract amount of $238,224.08.

ORIGINATOR: Purchasing

FISCAL ACTION (TO BE COMPLETED BY FINANCE)	FISCAL IMPACT (YES) NO
AMOUNT REQUESTED $238 224.08	FUNDING SOURCE *Elections Operating Budget Operating Budget Transfer*
FROM ACCOUNT # 100.100.105.451.100. 8224.08 480.000.000.4xx.xxx $230,000	PROJECT # 47527
TO ACCOUNT :	PROJECT #
VERIFIED BY: *Barbara Baumgart*	CERTIFIED BY:
DATE: 2/24/2020	DATE:

EXPENDITURES/REVENUES: (Thousands of Dollars)

OPERATING	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025
Personnel Services						
Travel						
Contractual						
Supplies						
Equipment						
Land/Structures						
Grants, Claims						
Miscellaneous						
TOTAL OPERATING						

CAPITAL	238					

REVENUE						

FUNDING: (Thousands of Dollars)

General Fund	8					
State/Federal Funds						
Other	230					
TOTAL	238					

POSITIONS:

Full-Time						
Part-Time						
Temporary						

ANALYSIS: (Attach a separate page if necessary)

PREPARED BY: _____	PHONE: _____	
DEPARTMENT: *Cheyenne Heindel*	DATE: _____	
APPROVED BY:	DATE: 2/24/20	

AM No. 20-014

SCOPE OF SERVICES

20-093P, IMPLEMENT CONTENT MANAGER FOR MANAGING ELECTRONIC RECORDS

PURPOSE
The Matanuska-Susitna Borough (MSB) currently uses Content Manager (CM) to manage paper and microfilmed records and needs to more fully implement the next phase, which is managing electronic records in CM.

BACKGROUND
The MSB is mandated by federal, state and borough regulations to manage borough records according to a retention schedule. In 2000, the Borough Assembly approved CM, previously known as TRIM, as the Borough records and information management application for managing paper records. In 2008, with the paper program successfully underway with CM, the Assembly approved additional licenses for managing electronic records Boroughwide. Since then, the Records Division has continued to develop the paper program and successfully implemented the microfilm/scanning program. In 2017, after a major upgrade, the Records Division began piloting the electronic records program. Presently, MSB has a few divisions using CM for managing electronic records, but most are not. To achieve greater electronic records management throughout the organization will require a business process analysis and additional training/personnel resources.

Currently, many staff store their records on the network drives and other repositories which do not have adequate security and access controls, nor the ability to exert retention scheduling and document destruction. Sharepoint, the network Shared Drives, Outlook and other repositories are not compliant in these essential functionalities. This project aims to improve the Borough's compliance through managing electronic records in CM.

SCOPE
The objectives of this project are to provide a change management plan, business process review analysis, workshops, and training for 40 departments/divisions (up to 350 employees) to manage electronic records including emails in CM. This project is to establish processes for each division to use CM, instead of shared network drives, to manage active and inactive electronic records. Moving the current content of the shared networks drives into CM is not within the scope of this project.

DELIVERABLES
The end result of this engagement will specifically include:
1. Implementation of CM for managing electronic records for up to 350 employees;
2. Business process analysis for each department and division for managing electronic records, and recommendation of streamlined solutions in CM. Analysis should include identification of any circumstance that may require a solution other than CM;
3. Workshops for each department and division to develop and train employees on the CM solutions identified for their business units;
4. CM training for up to 350 employees; 300 End Users, 50 Record Coordinators;
5. Review IT Infrastructure and provide recommendations to ensure full support of Borough-wide use of CM with sufficient bandwidth, networks and servers. Recommendations should anticipate some growth in the environment;
6. Performance measures; and
7. Full set of documentation for policies, procedures, surveys, checklists, guidelines, and training, including one training video for end users and one training video for record coordinators.

SCOPE OF SERVICES (CONTINUED)

20-093P, IMPLEMENT CONTENT MANAGER FOR MANAGING ELECTRONIC RECORDS

END RESULT
1. Compliance with MSB Code 2.25 and 2.47 as well as compliance with state retention and disposition requirements for all departments and divisions.
2. CM implemented for managing electronic records in alignment with each division's business processes.
3. Borough employees trained and transitioned from network drives to CM for managing electronic records.
4. All documentation must be submitted in Microsoft Office formats.

ORGANIZATION
Project Management:
MSB Records Management Officer will serve as the Project Manager to represent MSB interests and to manage the over-all project with the following responsibilities:
1. Reports to and receives direction from the Borough Clerk.
2. Participates in and reviews project plan and deliverables.
3. Assists with managing, reviewing, and prioritizing the project work plans with objective to stay on time and on budget.
4. Assists with management of the project resources.
5. Collaborates with project teams members.
6. Communicate and collaborate with the project manager of the selected vendor.
7. Meets with project team to regularly review issue and monitor progress.
8. Conducts risk management analysis.
9. Provide weekly updates to the Sponsor.

The proposer is expected to have their own internal PM to coordinate with and supply status information to the MSB PM.

SPECIAL REQUIREMENTS
Remote access will be available, but some work will be conducted at a Borough facility in Palmer, Alaska. Meetings, reviews and work requiring face-to-face interaction may be performed on-site and/or through remote connectivity.

TECHNICAL SPECIFICATIONS
The MSB will provide access to all networks required for completion of the engagement.

SCHEDULE
Work will begin upon issuance of the contract and will continue through project completion. MSB hopes to have the solution implemented no later than December 18, 2020.

DISCLAIMER
The Borough shall have unrestricted rights to all delivered data, reports and videos. All documentation and reports will be delivered electronically in Microsoft Office format that can be edited.

MINIMUM REQUIREMENTS
1. Services must be provided by an Information Management professional having at least 5 years' experience with Content Manager (previously known as TRIM or HP TRIM).

AM 20-014