BUDGET ISSUE SUMMARY FORM

Budget Issue Title: **Records Management and Document Imaging System**

Department: **Office of the City Manager – City Clerk**

1. **Issue Summary (briefly describe the budget issue):**

   This project represents Phase II of a Records and Information Management Plan. The plan was divided into two phases, the first of which dealt with such items as the development of a Citywide records retention plan, development of a vital records recovery plan, inventory and indexing of inactive records and the training of staff in public information laws. The pending completion of Phase I provides the foundation for Phase II, which would explore the application of document imaging and other advanced technological solutions for effective Citywide records management.

2. **Is the budget issue a: PROJECT X OPERATING _____**

3. **If the issue is operating, specify the change in service level(s) that would result (from what, to what). If the issue is a project, write N/A.**

   NA

4. **Note the issue's relationship to the appropriate general plan goal, policy, and/or action statement. (Briefly explain significant needs and expected benefits, noting possible outcome from postponement.)**

   Administrative Policy Manual Chapter V – Information Management Article V, Sections 1-3

   Significant Needs: The City's current records management system is obsolete and does not support timely and efficient retention and retrieval of information. Records searches often have to be done by hand which is time consuming and inefficient and City-owned storage space is at capacity. The City is continually challenged to meet the requirements of the Government Code related to records retention, internal requests for information and Public Information Act requests.

Expected Benefits: Improved efficiency in retaining records and responding to request for information retrieval. Possible reduction in costs related to off-site storage and records retrieval by vendor.

Postponement Outcome: Records retention and retrieval systems will continue to be inefficient and outdated.

5. **Origin of issue: Council** _____ (Councilmember _____)

Staff

6. **Projected cost (list rough annual cost of budget item):**

Operating Issue $ NA (Annual Operating Costs)

Capital/Project $ 100,000 (Project Cost) FY 2006/2007
$ 150,000 (Project Cost) FY 2007/2008
$ Unknown (Associated Annual Operating Costs)

Note: The current unfunded capital improvement project for Records Management indicates a need for a total of $350,000 over a three-year period. Above figures represent the first two years with an additional $100,000 proposed for FY 2008/2009.

Reviewed:

Department Director — *Date* 1-6-05

APPROVED BY CITY MANAGER — *Date* 1/27/05