TECHNOLOGY COORDINATION OFFICE

Review and Opinion Regarding the Proposed Contract Amendment for Maintenance and Support Of Shelby County's Document Management System
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Cost Summary:	**O&M**
FY 2010	**$ 170,538**

FY 2010 Budget Impact	
Budgeted?	**YES**

VENDOR: Casto Information Management Systems, Inc. (CIMS)

OVERVIEW:

In February of 2003, Shelby County entered into a contract with Casto Information Management Systems (CIMS) for **maintenance and support** of hardware and software associated with the County's Document Management System. The agreement allowed for three additional one-year renewal periods subject to funding and mutual agreement of both parties. While this contract renewal for FY10 (and the prior renewal covering FY09) extends beyond the total time period of four years envisioned in the original contract, the Purchasing Department has designated this vendor as **'single source'** for the specific document management-related support services covered by this proposal.

*(As in previous years, a related proposal for a contract renewal with this same vendor for document management system **professional services and hardware & software purchases** is also being brought before the Board of Commissioners at this time.)*

OPINION: RECOMMENDED

Business Need
Shelby County Administration and Elected Officials have ongoing and critical needs to sustain the efficiency of their respective workflow processes. The Mayor's and Commissioners Offices, Human Resources, Central IT, Archives and Public Records, and various Courts and Clerks offices are among the many County departments using the current document management technology. The system has been designed to minimize paper use and widen distribution of data, while reducing aggregate costs.

Value for the Financial Outlay
There have been ongoing deployments of scanners in various departments. Hardware and software support, as well as annual license costs, are outlays essential to preservation of the County's investment in this technology as well as continuing the productivity improvements that reduce the costs-of delivering Shelby County services to the public and internally. The amount requested is approximately $10,000 less than in FY09. This reduction is attributable to adopting a more cost effective option for scanner maintenance. .It should be noted that, at the June 16, 2008 Board of Commissioners meeting, an Enterprise License for Liquid Office purchases was approved. This license caps the Liquid Office portion of future year's maintenance at $60,000 irrespective of the number of licenses added.

Due Diligence
CIMS has served as the provider of electronic document management software and services to CIT and many of its internal County customers for several years. During this time they have developed a mutually beneficial working relationship with County users of document management services and acquired detailed system knowledge of highly-customized systems and processes. The Technology Coordination Office (TCO) has conducted investigatory conversations with Central IT management regarding the current state of County-wide document management efforts and future development plans. No significant risks were identified.

Strategic Fit
Continuing use of outside consulting services for the County's document management development and support is consistent with the County's IT strategy. The TCO will continue to assess the potential for cost effective alternatives as it develops recommendations based on the recently submitted inventory of County-wide technology assets and employee skill sets as part of its County Technology Plan (CTP) activities.

Information Security Considerations
The vendor is well-established, with a record of productive working relationships with the County. The contract with this vendor clearly enforces a due-care requirement to maintain the confidentiality of the County's data. As such, the risk appears to be managed adequately, provided the County adheres to standard security 'best practices' to maintain and monitor its network security.

Marc Johnson
for the Technology Coordination Office