



## SACOG Board of Directors

Item #07-7-3  
Consent

July 12, 2007

### **Approve Contract with L.R. Hines for SIRE Document Management Software**

**Issue:** To approve a contract for document management software.

**Recommendation:** Because there was no quorum, the Strategic Planning Committee did not take an official vote on this item. However, it was the consensus of the members present that the Committee recommend that the Board approve the Executive Director to negotiate a contract for SIRE document management software to L.R. Hines for up to \$30,000 and authorize the Executive Director to sign it.

**Committee Action/Discussion:** Since SACOG moved into the new building, we have found ourselves faced with increased document management and storage issues. While looking into various solutions for managing our documents, staff realized that SACOG does not have an adopted document retention policy. SACOG's attorney recommends that a document retention policy be developed to determine when and what documents can be destroyed in accordance with law as well as what documents can be kept electronically.

After consulting with many local jurisdictions as well as city and county clerks throughout California about document solutions, staff has determined that document management software is necessary. An informal request for proposals was sent out to vendors; however only two quotes were received, one of which was from L.R. Hines for the SIRE document management software.

Last month, the city of Roseville held a SIRE User Group meeting for all current and prospective SIRE users. Many of our local jurisdictions attended and reported that they have switched to SIRE after their previous software management software failed to meet their expectations. Local jurisdiction SIRE users include: Cities of Placerville, Rocklin, Lincoln, Roseville, Citrus Heights, Yuba City and counties of Placer, Sacramento and Yolo.

SIRE software includes every aspect of document management from storage and retrieval to workflow and records retention. L.R. Hines, the local SIRE distributor, is well respected among local SIRE users for its customer service and willingness to work with the jurisdictions to customize the software to meet individual needs. Total cost includes one year prepaid support and all installation, setup, implementation, training and additional hardware requirements.

Approved by:

Mike McKeever  
Executive Director

MM:KW:RT:gg

Key Staff: Karen Wilcox, Director of Finance, (916) 340-6210  
David Hodgson, Senior Information Technology Analyst, (916) 340-6217  
Rochelle Tilton, Clerk of the Board, (916) 340-6208