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**MEMORANDUM
DEPARTMENT OF PLANNING & PUBLIC WORKS**

TO: PLANNING AND PUBLIC WORKS COMMITTEE

**FROM: Mary Ann Madden, Office Manager
Planning & Development Services**

DATE: January 7, 2009

RE: Electronic Records Management

In an effort to reduce paper consumption, copier usage, reduce the flow of paper files into archive storage, and most importantly, to make information more readily available to the public, the Planning and Public Works Department began creating electronic file folders for all Committee packets and zoning petition submittals. As a result, we were immediately able to make complete agenda packets available to on-line viewers. Please note that prior to this effort, only the agenda itself was available for viewing.

Concurrently, the Department initiated creation of electronic scans of both plans and documents as files were sent to be microfilmed. A considerable amount of time was devoted to the development of file architecture and naming conventions such that storage would be consistent and retrieval would be both fast and intuitive.

As you are also aware, these efforts were also being coordinated with enhancements to the City's website and the transition of our GIS system to a web-based platform. Through the new "Resident Information Portal" on the City's website, residents are able to access information about their trash pickup day, subdivision trustees, general information about their parcel or address, and ward, zoning and record plat maps.

The Engineering Record Systems and the Chesterfield Information databases store recorded plans, project files, past meeting packets and minutes, Board of Adjustment petitions, municipal zoning approvals, subdivision zoning information, flood plain information, and building permit, occupancy permit and special use permit information. The availability of all these electronic files enables Staff, and specifically the Planner of the Day, to access files more quickly in an effort to better serve the public.

Attached is more detailed information on the scanning and microfilming process that has been initiated.

Background

The City of Chesterfield has adopted the State of Missouri's "Retention Schedule for Municipal Records". Because meeting files and subdivision project files contain records that are considered "permanent records", the material must be microfilmed for the City to fulfill its statutory responsibility for maintaining permanent records. Electronic records are not considered a permanent form of preservation as electronic forms of records may become inaccessible as hardware and software become obsolete.

Along with having the records microfilmed, the Director of Planning & Public Works directed Staff to also scan all these records so there would be an electronic version available through a database for Staff to access. All files are scanned before being sent out for microfilm.

Process

The preparation of files for scanning and microfilming involves several steps:

1. Organize file chronologically and remove duplicate records.
2. Remove all staples and paperclips.
3. Copy all two-sided documents as one-sided documents.
4. Scan the material – this usually involves scanning from the Canon copier and the Xerox Wide Format Scanner for large plans.
5. Combine all the scanned material into one document.
6. Proof the scanned material and make any needed corrections.
7. Transfer the scanned material into the database.
8. Send out the material to Microtek for microfilming.
9. Proof the microfilm for accuracy and recycle the paper copies.

The entire 9-step process takes approximately 1-2 hours per file.

Status

The table below shows that since starting the microfilming/scanning process in August 2008, 1,052 files have been completed. It should be noted that the costs for August, 2008 thru April, 2009 include scanning costs. As of May, 2009, scanning is being done in-house, which reduces our costs substantially.

	No. of Boxes	No. of Files	Cost
Aug-Dec 2008	15	350	\$13,230.52
Jan-Dec 2009	35	702*	\$18,663.30
TOTAL	50	1,052	\$31,893.82
<i>*65 of these files have been scanned but will not be sent out for microfilm until January 2010.</i>			

Of these 1,052 files, 496 files are *Subdivision files*, and 555 are *Meeting files*. The attached spreadsheet gives a breakdown of the types of subdivision and meeting files that have been completed.

All of the files are being scanned into the ERS database entitled "*Archived Records*". Back-up disks are being stored at the Public Works facility.

Since the beginning of 2009, each individual Municipal Zoning Approval (MZA) is being scanned into the CID database. The MZAs in the ERS-Archived Records database are for the years prior to 2009 and are filed according to subdivision name.

We have completed archiving Planning Commission meeting packets and minutes from 1988 thru 1999. In addition, all Planning Commission and Committee meeting files for 2006 and 2007 have been completed. The 2008 meeting files are being started now and will be shipped out in January. (*We only keep the current and prior year files in the active files within the Department – and so as not to add more files to the Archive storage space in the lower level, we are preparing files at the end of each year for microfilm and moving the already-scanned meeting packets to the ERS-Archived Records database.*)

After the 2008 meeting files have been prepared, our focus will be on preparing files of Improvement Plans, which will free up much-needed filing cabinet space. If the recorded Improvement Plan has already been scanned into ERS under *Record Plats*, it is not to be re-scanned under *Archived Records* - but it is being sent out to be microfilmed.

It should be noted that the Department's Engineering Technician, Kara Crisp, has built very workable and user-friendly databases and the Admin staff is working as a team to accomplish this work.

ARCHIVED SUBDIVISION FILES		ARCHIVED MEETING FILES		
Type	No. of Files	Type of Meeting	No. of Files	Years
Escrows & Sureties	4	Architectural Review Board	39	2006-2008
Escrow Inspections	4	Board of Adjustment	24	2006-2007
Municipal Zoning Approvals	327	Committee Meetings (Planning Commission)	37	2006-2007
General Correspondence from Subdivision files	13	Landmarks Preservation Com	18	2006-2007
Grading Permits	10	Planning Commission	369	1988-1999 2006-2008
Improvement Plans	73	Planning & Public Works Com	26	2007-2008
Ordinances & Resolutions from Subdivision files	3	Planning & Zoning Com	43	2006-2007
Plats	17			
Site Development Concept Plans	7			
Site Development Plans	10			
Site Development Section Plans	16			
Site Plans	2			
Rezoning/Ordinance Amendments	10			
TOTAL	496	TOTAL	556	
TOTAL NO. OF FILES SCANNED - 1052				
TOTAL NO. OF FILES MICROFILMED - 987				