

Town of Longmeadow
Massachusetts
Community Preservation Committee



Telephone 413-565-4110
Fax 413-565-4112

20 Williams Street
Longmeadow, MA 01106

www.longmeadow.org

Application for
Community Preservation Act Funding

RECEIVED
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 TOWN OF LONGMEADOW

Instructions

1. Review attached Community Preservation Act (CPA) funding eligibility, selection criteria (Appendix), and application.
2. Prepare and submit 10 typed and double-sided copies of the application form and project description to the CPC, c/o the Town Clerk's Office, Town Hall, 20 Williams St., Longmeadow, MA 01106.
3. The Community Preservation Committee (CPC) will accept project proposals through December 3rd, 2015 for possible consideration at the following Annual Town Meeting.
4. The CPC will review all applications by December 31 and schedule a meeting with each applicant to discuss its proposal.
 - a. The CPC may ask for more information before deciding to recommend the proposal for funding.
 - b. The CPC may request that you present your proposal at a public hearing.
5. If the project is selected for a funding recommendation, the CPC will submit it to Town Meeting.
6. Town Meeting has the sole authority to fund projects.

** Please note that the Committee reserves the right to modify these procedures and timeframe. Emergency applications will be accepted at the discretion of the CPC. The committee reserves the right to reject applications that are incomplete or late.*

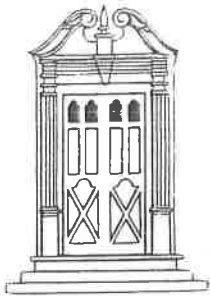
Application Form

For CPC Use: Project # 2016-3
 Received on: / / Received by:
 Reviewed on: / / Determination:

Applicant Information

Project Title: <u>PRESERVATION OF PERSONNEL/PAYROLL RECORDS</u>	
CPA Funding Request: \$ <u>75,000.00</u>	Total Cost of Proposed Project: \$ <u>75,000.00</u>
Applicant Name: <u>ERICA GOINAS</u>	Contact Name: <u>ERICA GOINAS</u>
Mailing Address: <u>735 LONGMEADOW ST STE 102</u>	Community Preservation Act Category <input type="checkbox"/> Community Housing <input checked="" type="checkbox"/> Historic Preservation <input type="checkbox"/> Open Space <input type="checkbox"/> Recreation <i>Please check all that apply:</i>
City, State, Zip Code: <u>LONGMEADOW MA 01106</u>	
Phone/Fax: <u>(413) 565-4124 (413) 565-4112</u>	
Email &/or Website: <u>egoinas@longmeadow.org</u>	

Please attach a project description and budget, as indicated on page 2.



town of

LONGMEADOW, MASSACHUSETTS

735 Longmeadow Street, Suite 102 01106

phone: 413-565-4128
fax: 413-565-4372

ERICA GELINAS *Human Resource Manager*
DIANA MORROW *Assistant Human Resource Manager*



November 23, 2015

Longmeadow Community Preservation Committee
c/o Town Clerk's Office
Longmeadow Town Hall
20 Williams Street
Longmeadow, MA 01106

Re: Supplemental request to seek the balance on funds originally requested from the CPC \$140,000.00 and partially funded at \$50,000.

Dear Longmeadow CPC:

This is a request for additional funding for the preservation of town personnel and payroll records to prevent loss of information due to deterioration of these semi-permanent and permanent records. The approximate remaining cost of this project will be \$75,000 (see description below, plus attached proposals from King Information Systems and New England Achieves Centers). As you are aware the CPC previously awarded this project \$50,000 in 2014/2015 for the scanning and Microfilming of Inactive Employee Files

Goals: The primary goal of this project continue to be the preservation of permanent and semi-permanent town personnel and payroll records through the establishment of a comprehensive record retention program utilizing proper storage, microfilming and scanning.

To recap, until the Human Resources Department was created by the Town Charter in 2004, each department, including the school, had their own filing and record retention system located within their buildings. In 2004, the responsibility of semi-permanent and permanent personnel and payroll records transferred to the newly created Human Resources department, making it the official custodian of the records and creating spatial storage issues for the department. Through the recent relocation of the Human Resources Department and the creation of department specific storage rooms, efforts have been made to consolidate these files. However, inactive personnel, health and insurance records and previous year's payroll records are still located in random piles, binders and boxes in the basement of the Town Hall and in various storage locations in the Community House leaving them vulnerable to loss, environmental continual change and decay. Environmental characteristics such as light, temperature, humidity and air quality influence the condition and overall longevity of records and the information they contain.

With the 2014/2015 funds already received, all pre-audited inactive personnel, medical, workers compensation and FMLA files were retrieved by New England Achieves and the process has begun of digitizing these files into a user friendly indexed pdf format to be stored on the town server for use by

departmental personnel for reference as needed for daily operations. PaperVison Enterprise image viewing software will be used with the pdf's for a full text searchable database. Because the 2014/2015 award was specific that the funds were approved for "**the scanning and Microfilming of Inactive Employee Files**", no funds were used for the auditing and decentralization of the remaining inactive files. This software was not covered in the original 2014/2015 award however this software was a requirement in order to begin phase 1 of the project. The IT Department agreed to purchase the PaperVison software to allow for the scanning process of inactive files to begin.

If this year's request is approved, efforts will continue on the auditing and separation of inactive personnel files to individual files for medical, workers compensation, CORI and I-9 documents from the files. These newly audited inactive files would be forwarded onto New England Achieves. Using the previously awarded 2014/2015 funds these files can then be digitized into the database. The then alphabetized combined digitized files can be microfilmed using the balance of the award from 2014/2015. Because the Microfilm will satisfy the Commonwealth's long term storage requirement, the original paper copies can then be destroyed. A copy of the DVD's containing the pdf's can be stored off-site in the vendor's vault for disaster recovery purposes.

If this year's request is approved, efforts will begin on town payroll records to include bi-weekly payroll journals and annual W-2's which will also be Microfilmed and scanned in the same fashion and for the same use.

Although apart of the original bid request, we are still not looking for funding for a Microfiche Jacket System as this step would not be necessary when utilizing the scanned pdf method.

Community Need and Support:

The Massachusetts Statewide Retention Schedule is produced under the statutory provisions of Massachusetts General Laws ch. 4, § 7(26), c. 30 § 42, and c. 66, §§ 1, 8 and 9. It is the responsibility of government officers who create, receive and maintain public records to ensure their safekeeping and availability to the public. Access to public records ensures public involvement and participation and provides mechanism for holding government accountability for its decisions and actions.

Action Plan and Timeline:

If approved, phase 2 work can begin on this project as soon as funds become available after Town Meeting and work is estimated to be completed within the next fiscal year.

Maintenance and Preservation:

Once all of the historical information is processed, future inactive files can be maintained in two ways:

- New inactive files can be scanned utilizing human resource department technology for storage on the town server in easily retrievable pdf format and added to the PaperVison software in house.
- Once scanning is completed, new inactive files can then be sent to the achieving company at pre-determined intervals for microfilming and permanent backup storage and scanning onto achievable DVD's. Paper files can then be destroyed.

Budget:

Estimate-

- \$17,280 plus expenses for auditing of inactive files
- \$192.00 per day for alphabetizing of files (# of days unknown)- no longer necessary
- \$47,354.38 for scanning and Microfilming of Inactive Employee Files- previously awarded
- \$1,593.49 for scanning and Microfilming of Worker's Compensation Files
- \$55,798.65 for digitizing payroll records
- \$1,595.00 for PaperVision Enterprise retrieval software- purchased by IT

Other Funding:

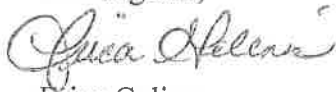
No other funding sources are available at this time.

Mandated Construction Expenses:

N/A- Any necessary construction can be performed utilizing in-house Department of Public Works Maintenance employees.

If you have any questions or are in need of any further information please feel free to contact me. Thank you in advance for your consideration.

Best regards,



Erica Gelinas

Human Resource Manager

Micrographic Systems

Electronic Imaging Services

Records Storage

July 25, 2014

Ms. Erica Gelinias
Human Resource Manager
Town of Longmeadow
735 Longmeadow Street, Suite 1
Longmeadow, MA 01106

Dear Ms. Gelinias:

Thank you for the opportunity to provide you with this quotation for our various record management services regarding the town's Human Resource department files. For ease of comparison our quotation is based on the activities and the file and image estimates provided in the initial vendor proposal. Billing will be based on the actual file and images counts generated during the conversion process. As I mentioned during our meeting, New England Archives Center is an approved vendor on Massachusetts' State Contract OFF27 for Micrographic and Digital Imaging Products and Services. You can take advantage of the aggressive pricing the contract provides as a result of the state's buying power.

OPTIONS

1. Audit of Remaining "Inactive" Employee Files, Purging Medical Documents and I-9 Forms.
Page 13

Equivalent of 61 standard storage boxes containing an estimated 2,086 folders. We estimate it would take approximately 45 days to complete using two staff people and cost \$17,280.00 plus expenses. An option would be for us to remove the files to our Holyoke location to perform the file purge. This will eliminate the onsite expenses. We will pick up and return the files at no charge. We will perform a test of the process on a sample of the files to confirm our assumptions regarding the throughput and cost.

2. Create One Large A-Z Inactive Employee File.
Page 13

Our staff people will be charged at \$192.00 each per day plus expenses. An option would be for us to remove the files to our Holyoke location to perform the file merge. This will eliminate the onsite expenses. We will pick up and return the files at no charge. We will confirm our assumptions regarding the throughput and cost once we have completed a portion of the files.

3. Cost to Convert the Inactive Employee Files to a Microfiche Jacket System.

Pages 13 & 14

A. Document Pickup, Preparation, Microfilming and Disposition

Document and File Estimate: 4,352 files containing 420,000 images

Document Preparation: Approximately 763 hours @ \$10.50 each \$ 8,011.50

Document Microfilming: 420,000 images @ \$.03 each \$12,600.00

Film Processing: 168 rolls @ \$4.50 each \$ 756.00

Document Pickup: No Charge

Document Destruction: No Charge

B. Microfiche Jackets: Approximately 7,000 required @ \$2.42 each \$16,940.00

Jacket Insertion/Typing: Approximately 7,000 required @ \$.59 each \$ 4,130.00

C. Lines of Insertion

Included in Section B.

D. Preparation Work

Included in Section A.

E. 6 #MS-16 VisuFlex Trays, 16 inch capacity @ \$96.00 each \$ 576.00

F. 1 Set 6x4 alphabetical index guides, 25 division. \$ 28.00

G. 1 Set "Out Guides", #24200/30 per set \$ 36.00

H. 168 Duplicate Rolls @ \$5.95 each \$ 999.60

Item 3 Total Cost: \$44,077.10

4. Scan/Microfilm All Inactive Employee Files.
Page 15

We recommend scanning the employee files and creating a set of archival microfilm rolls from the scanned images. The microfilm will satisfy the state's long term storage requirement. Digitizing the files will eliminate the purchase of microfiche storage equipment and a microfiche viewer/printer that can cost up to \$10,000.00. The files can be scanned creating bitonal multipage PDF format images that are full text searchable for use with Adobe's image viewing software. The images and data files can be stored on a network server and accessed by department staff on their desktop computers. Files can be located quickly and printed or emailed as required. The following are the associated costs for this alternative.

Document and File Estimate: 4,352 files containing 420,000 images	
A. Document Preparation: Approximately 763 hours @ \$10.50 each	\$ 8,011.50
B. Document Scanning: Initial 100,000 images @ \$.052 each	\$ 5,200.00
Next 320,000 images @ \$.049 each	\$15,680.00
C. File Indexing: Approximately 4,352 Files @ \$.19 each	\$ 826.88
D. Master DVD's: 7 required @ \$12.00 each	\$ 84.00
E. Archival Roll Microfilm: Approximately 420,000 images @ \$.04 each	\$16,800.00
F. Microfilm Processing: Approximately 94 rolls @ \$6.50	\$ 611.00
G. Annual Microfilm Vault Storage: Approx: 94 rolls @ \$1.50 each	\$ 141.00
G. Document Pickup:	No Charge
H. Document Destruction:	No Charge

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Item 4 Total Cost: \$47,354.38

This option represents a savings of over \$6,000.00 by eliminating the purchase of a microfiche viewer/printer.

5. Scan/Microfilm All Workers Compensation Files.

Pages 15 & 16

Document and File Estimate: 740 files containing 13,151 images

A. Document Preparation: Approximately 19 hours @ \$10.50 each	\$ 199.50
B. Document Scanning: 13,151 images @ \$.052 each	\$ 683.85
C. File Indexing: 740 Files @ \$.19 each	\$ 140.60
D. Master DVD's: 1 required @ \$12.00 each	\$ 12.00
E. Archival Roll Microfilm: Approximately 13,151 images @ \$.04 each	\$ 526.04
F. Microfilm Processing: Approximately 6 rolls required @ \$4.50 each	\$ 27.00
F. Annual Microfilm Vault Storage: 3 rolls @ \$1.50 each	\$ 4.50
G. Document Pickup:	No Charge
H. Document Destruction:	No Charge

Item 5 Total Cost: \$ 1,593.49

The cost to convert the payroll journals was not included in the initial vendor proposal provided to me. The following costs are based on my survey of the journals performed during my visit.

6. Microfiche Jacket System for Payroll Journals.

A. Document Estimate: 497,250 images.	
B. Document Preparation: Approximately 904 hours @ \$10.50 each	\$ 9,492.00
C. Microfilming: Approximately 497,250 pages @ \$.03 each	\$14,917.50
D. Microfiche Jackets: Approximately 12,432 required @ \$2.42 each	\$30,085.44
E. Jacket Insertion/Typing: Approximately 12,432 required @ \$.59 each	\$ 7,334.88
F. Microfilm Processing: Approximately 199 rolls @ \$4.50 each	\$ 895.50
G. Duplicate Microfilm Rolls: Approximately 199 rolls @ \$5.95 each	\$ 1,184.05
H. Annual Microfilm Vault Storage: Approx: 199 rolls @ \$1.50 each	\$ 298.50
I. VisuFlex Microfiche Trays: 10 required @ \$96.00 each	\$ 960.00
J. Document Pickup:	No Charge
K. Document Destruction:	No Charge

Item 6 Total Cost: \$65,167.87

7. Digital System for Payroll Journals.

A. Document Estimate: 497,250 images	
B. Document Preparation: Approximately 904 hours @ \$10.50 each	\$ 9,492.00
C. Document Scanning: Initial 100,000 images @ \$.052 each	\$ 5,200.00
Next 397,250 images @ \$.049 each	\$19,465.25
D. Indexing Pay Periods: Approximately 2,756 pay periods @ \$.15 each	\$ 413.40
E. Master DVD's: Approximately 12 required @ \$12.00 each	\$ 144.00
F. Archival Microfilm Rolls: 497,250 images @ \$.04 each	\$19,890.00
G. Microfilm Processing: Approximately 199 required @ \$4.50 each	\$ 895.50
H. Annual Microfilm Vault Storage: Approx. 199 rolls @ \$1.50 each	\$ 298.50
I. Document Pickup:	No Charge
J. Document Destruction:	No Charge *

Item 7 Total Cost: \$55,798.65

This represents a savings of more than \$9,000.00 over the microfiche based system yet provides the following advantages.

Eliminates manual retrieval, re-files and misfiled microfiche jackets.

Eliminates the purchase of a microfiche viewer/printer (\$10,000.00).

Improves information security and integrity as the images and data are stored on the town's computer network and protected by the network's security.

Improves staff productivity through faster access to needed information.

SERVICE DESCRIPTION

FILE PACKING AND TRANSPORT

Our driver will create an inventory of the first and last file in each box removed for conversion. We will place a label on each box that contains the Town's name, the date of the pickup, the sequential box number and a pickup control number that is used to track the boxes throughout the production process. We will provide authorized town staff with free access to the files by scanning requested files and emailing the images.

FILE PREPARATION

The staples and paperclips will be removed from the files. Torn or damaged pages will be repaired. The files and pages will be kept in their original order.

DOCUMENT SCANNING

The documents will be scanned to the multipage page black and white PDF searchable image format at 200 dpi resolution. The images will be scanned and/or rotated so the information will be "Right Reading" whenever possible. The images are displayed and viewed to ensure their clarity and reproducibility during the capture process. After scanning the images are processed to remove skew and possible black borders. Automatic image manipulation processes that may jeopardize the quality or validity of the images are not used.

INDEXING

The personnel files will be indexed with the employee names while the payroll journals will be indexed with the pay period dates.

OPTIONAL RETIREVAL SOFTWARE

PaperVision Enterprise

Per Concurrent User License

\$1,595.00

Includes 12 months telephone software support and upgrades.

Annual Coverage thereafter is \$195.00 per license.

Installation and Training: \$800.00 per day.

DELIVERY

Completed batches of images and data will be delivered on DVD media. A copy of the DVD's created for the project can be stored in our vault for disaster recovery purposes.

FILE DISPOSITION

The personnel files and payroll journals will be securely destroyed upon receipt of your written approval.

We look forward to working with you on the successful completion of the project. If you have any questions or want to schedule the removal of the files please call me at 413-532-1465.

Sincerely,



Brian Colton

Regional Sales Representative

New England Archives Center

Quote No. 5190