

Development Services Document Management Project

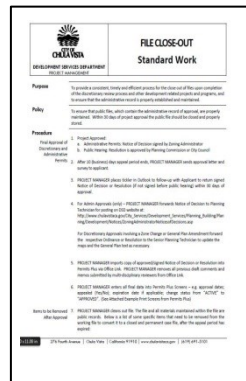
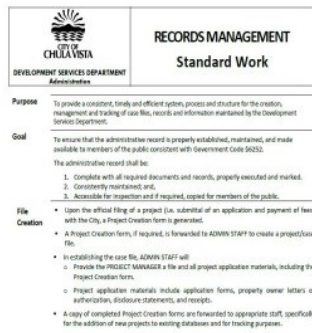
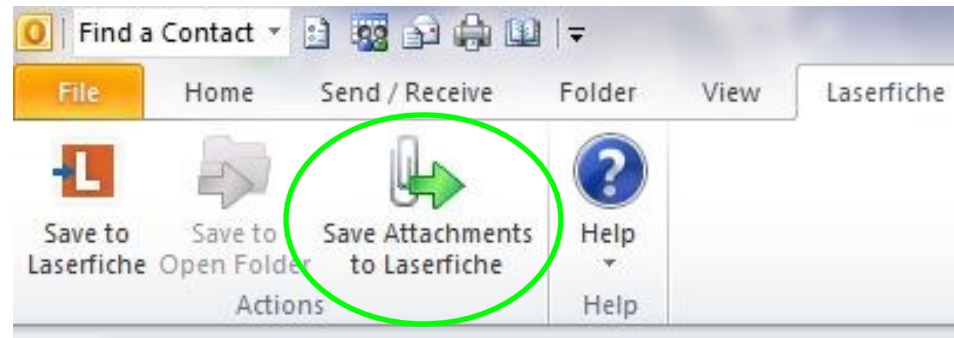


Continuous Improvement Through You

July 22, 2014

Moving Paper to the Electronic/Digital Age

“We have the tools. We’re just changing the culture.”



Maximizes our resource capabilities (people & software)



Current State

Docs ready to go to storage



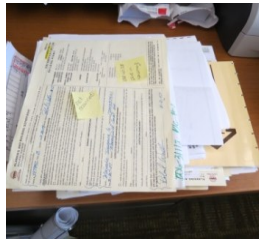
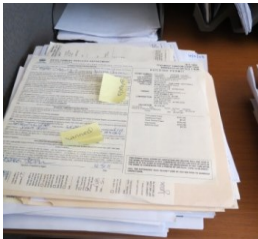
File Storage



Plans pulled for review – Code Enf



Docs pulled for discovery request

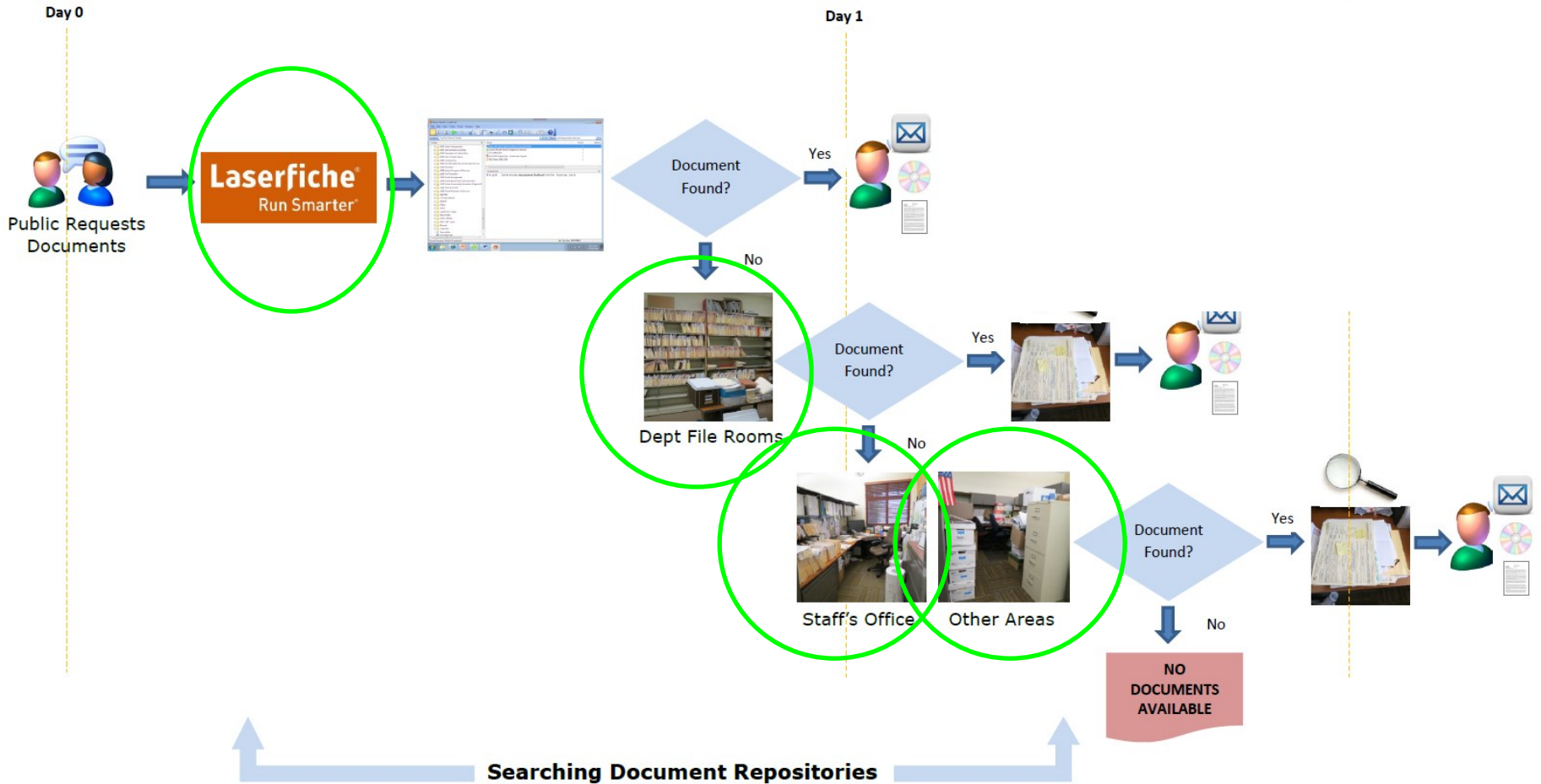


Docs in process of scanning

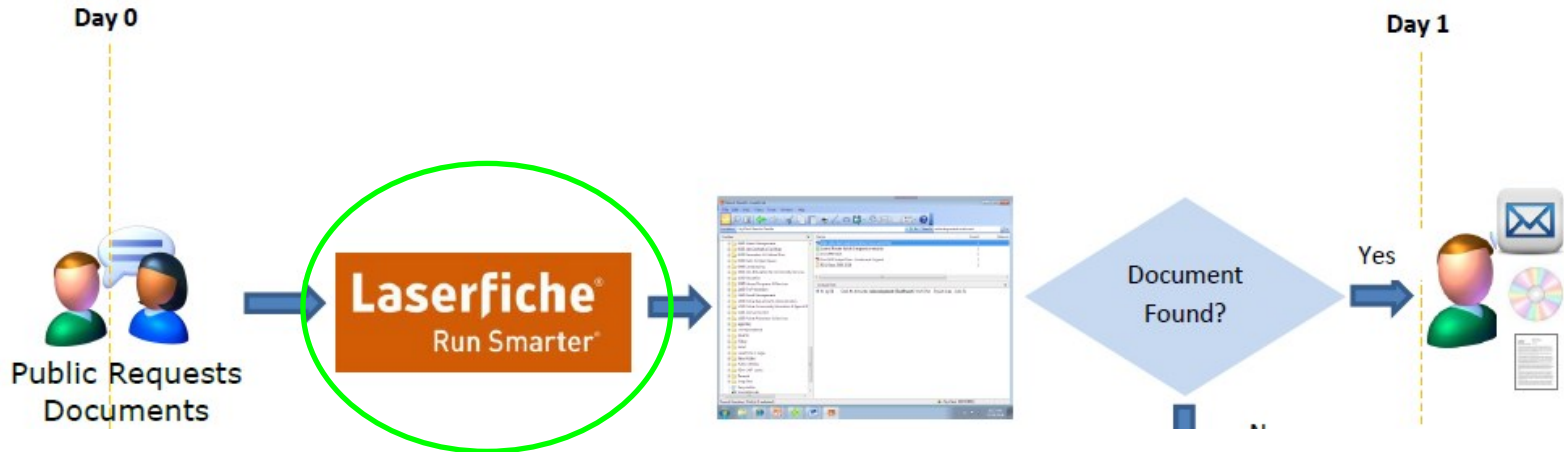


25 Boxes

Current State

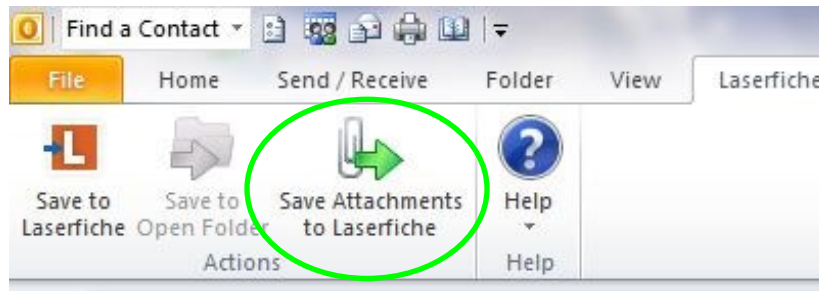



Future State



MOVING FORWARD

- ✓ Standard File Management
- ✓ Electronic Document Submittal
- ✓ Utilize Existing Software



 CITY OF CHULA VISTA DEVELOPMENT SERVICES DEPARTMENT Administration		RECORDS MANAGEMENT Standard Work
Purpose	To provide a consistent, timely and efficient system, process and structure for the creation, management and tracking of case files, records and information maintained by the Development Services Department.	
Goal	To ensure that the administrative record is properly established, maintained, and made available to members of the public consistent with Government Code 56252. The administrative record shall be: <ol style="list-style-type: none">1. Complete with all required documents and records, properly executed and marked.2. Consistently maintained; and,3. Accessible for inspection and if required, copied for members of the public.	
File Creation	<ul style="list-style-type: none">• Upon the official filing of a project (i.e. submittal of an application and payment of fees) with the City, a Project Creation form is generated.• A Project Creation form, if required, is forwarded to ADMIN STAFF to create a project/case file.• In establishing the case file, ADMIN STAFF will<ul style="list-style-type: none">o Provide the PROJECT MANAGER a file and all project application materials, including the Project Creation form.o Project application materials include application forms, property owner letters of authorization, disclosure statements, and receipts.• A copy of completed Project Creation forms are forwarded to appropriate staff, specifically for the addition of new projects to existing databases and for tracking purposes.	

- ❑ Connect Laserfiche, Accela Automation & GIS
- ❑ Citywide Consistency
- ❑ Update Citywide Records Management Program

Problem Statement

- Delay in responding to public requests
 - Public Records Act (PRA)
 - Public requests for info

Fiduciary duty to manage documents for the public.

Time is Money !

Problem Statement

- Delay in responding to public requests

GOAL: 3 day response time by moving to electronic storage of documents

Benefits to Organization

- Reduces research time & frustration
- Increases staff capacity

Benefits to Customers

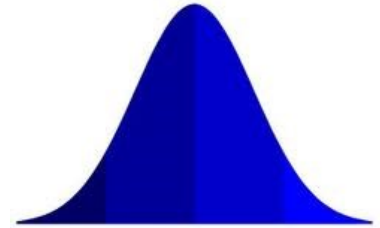
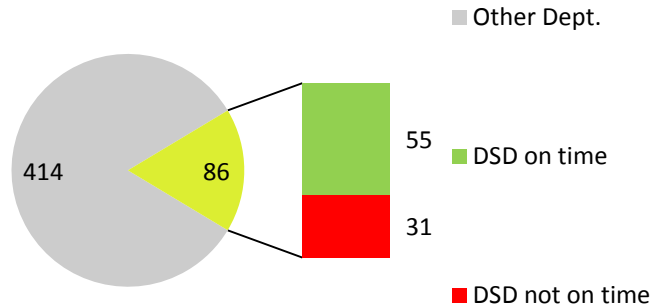
- Info when they need it

Current State

Public Records Act (PRA) Requests



500+ PRAs/Year



Median=12 days to locate and deliver docs

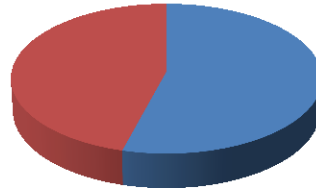
Customer Requests



FRONT COUNTER REQUESTS

45% wait more than a week to receive docs

33 requests/month must wait



39 requests/month completed with the first visit

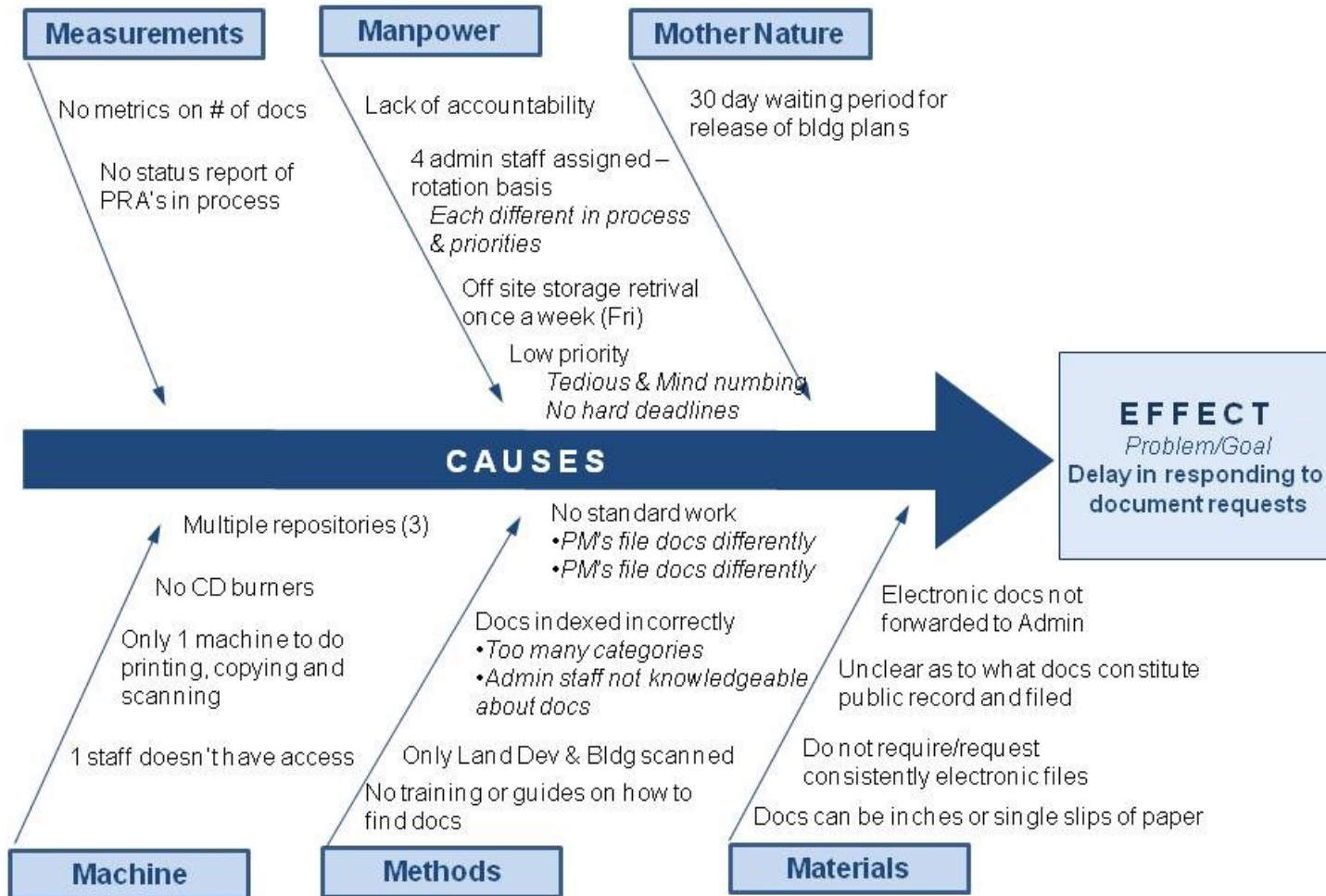
1/2 FTE spent tracking files



1. Walk In Front Counter
2. Email
3. Phone

Root Cause Analysis

CAUSES OF DELAY IN DOCUMENT REQUESTS



Countermeasures

MATERIALS

- ✓ Define public documents/record
- ☑ Require electronic versions of every document with project approval.
- ☑ Develop FAQs & materials to train on the use of Laserfiche

MANPOWER

- ☑ Project Managers to file electronic documents
- ☐ Training program for staff and the public to access info

MACHINES

- ✓ Use of existing software & standardizing all DSD
- ☐ Connect Laserfiche, Accela Automation & GIS

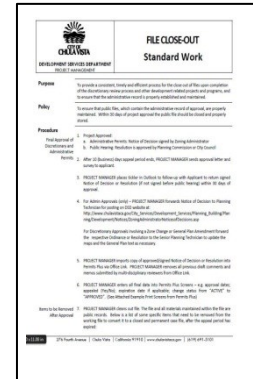
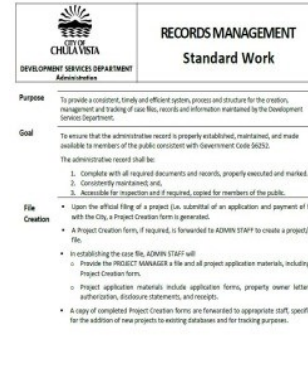
Countermeasures

METHODS

- ✓ Standard File Management policy
 - Project Manager
 - File Storage
- ✓ Use existing software to save straight to Laserfiche



- ❑ Review retention policy
- ❑ Revise Laserfiche organizational structure
- ❑ Train staff on policies and use of software
- ❑ Require all divisions to Laserfiche



Countermeasures

MEASUREMENTS

- ✓ Tracking of time to scan docs
- ✓ Track and monitor status of PRA requests
- Use Project Accounting to track PRAs
- Quality Control - Random Audits of Laserfiche Docs

Future Opportunities



- Equipment/Software Upgrades
- Integrate Databases
- Stored Records
- City Wide Consistency

Don't Look Back We're Not Going That Way...