

(Schedule One)

**Records Management Plan
Implementation,
Scope of Work at the CRM Storage
Facility in Tampa, Florida**

For the

**City of Key West
Florida**

June 20, 2014

 **SML, INC.**
Information Analysis, Design, Planning and Training
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June 20, 2014

Ms. Cheri Smith, MMC, CPM
City Clerk, City of Key West
P. O. Box 1409
Key West, Florida 33041-1409
Emailed to: csmith@keywestcity.com

Dear Cheri,

I'm pleased to propose a scope of work for implementation of our CRM Storage Facility recommendations contained within your Plan. I'm sure you agree, we are the best qualified to assist you with this implementation effort, not only because we made the recommendations; but our experience is second to none.

Our fee to work at CRM in Tampa on your behalf identifying records eligible for destruction and indexing the remaining collection is **\$1,600.00 per eight hour day inclusive**. Travel and all related expenses are included. Given the **5,000 plus cubic foot volume**, I estimate a total cost to the City of **approximately \$167,000.00** for this entire effort. This could, of course, be more; but I expect it will be less.

As requested, we will spread this project across three fiscal years beginning **2014/15** at \$55,666.66 per fiscal year. This equates to roughly 34.79 man days, so to make sense, I suggest the City budget **\$56,000.00 the first year for 35 man days**. As we estimate year two and three, we will better understand specific project requirements. The project will begin as follows:

- Each staff member will be provided floor space at CRM in Tampa and a computer to access the City of Key West digital inventory as it is already populated at CRM. The expense for the floor space, work stations, computers and digital access is included in our daily quoted rate.
- The City will give CRM written authority for each staff member to initiate this digital access as required by your existing CRM contract.
- Our staff will be given specific passwords creating a digital record for tracking all amendments per staff to the digital inventory. This will help me determine issues needing clarification and also ensure efficiency for both our and City interests.

- In batches of approximately 40 cubic feet each (roughly a pallet), CRM staff will pull from shelf locations City accessions and deliver to each staff member who then file by file or file batch by file batch, will compare records to the City authorized Disposition List, identifying records eligible for destruction.
- These destruction eligible records will be destroyed under your existing contract with CRM.
- Records with remaining retention will be correctly indexed to the CRM digital data base across all appropriate fields to ensure retrieval for administrative use by the City and/or eventual destruction.
- As appropriate, accessions will be re-containerized to standard units and to reduce the overall billable accession made to the City under your existing unit based storage contract.
- CRM staff will return City accessions to storage under your existing contract.
- I or our on-site Supervisor will make recommendations to you throughout the project as necessary. These may include nothing more than slight modifications to this process, clarification of indexing strategies, or recommendations for preservation of extremely valuable, archival quality records, etc.
- I or our on-site Supervisor will contact you directly to clarify issues with a view towards efficiency, economy and absolute correctness as issues may arise.
- During this process, and in the future; when an accession is requested by the City, CRM staff will image and email same to an authorized City email account, the "image on demand" process we discussed under the existing CRM contract.

Thank you. We look forward to working with you and other staff on this project. Please give me a call to discuss any of this you wish. It is still true you need to get into our calendars quickly, if you wish to proceed. Thanks again!

Sincerely,



Steve M. Lewis