

MMANH Local Government Management Fellowship

Archives and Records Management Inventory Needs Assessment and Strategic Plan

**Presented on
November 3, 2014**

**Submitted to:
Town of Stratham, New Hampshire**

**Submitted by:
Nicholas Pasquale**

| | |
|---|--------------|
| Table of Contents..... | 2-3 |
| Executive Summary..... | 3-5 |
| Storage Areas and Departments..... | 6-58 |
| Maintenance Area..... | 6-14 |
| Town Clerk Vault..... | 15-20 |
| Town Administrator Office..... | 21-22 |
| Parks and Recreation Office..... | 23-24 |
| Behind Town Administrator Assistant..... | 25 |
| Printer Area in Administration..... | 26 |
| Assessing Office..... | 27-28 |
| Assessing Assistant’s Office..... | 29-30 |
| Building Inspector/Code Enforcement Office..... | 31-32 |
| Land Use Assistant’s Office..... | 33-36 |
| Town Planner’s Office..... | 37-39 |
| Police Department..... | 40-41 |
| Library..... | 42 |
| Finance Office..... | 43-44 |
| Fire Department..... | 45 |
| Highway Department Office..... | 46-47 |
| Highway Department Mezzanine..... | 48-50 |
| Municipal Center Inner Basement..... | 51-54 |
| Municipal Center Outer Basement..... | 55-58 |
| Shredding Services..... | 59 |
| Vendors..... | 60-65 |
| King Information Systems..... | 60 |
| DocStar – PiF Technologies..... | 61 |

Dupont Storage Systems.....62

RICOH USA.....63

Treeno Software – Conway Office Solutions.....64

Inception Technologies.....65

Recommendations.....66-67

RSA 33-A Disposition of Municipal Records.....68-73

Executive Summary

- The MMANH Fellowship has been an amazing opportunity for me to shadow every department at the municipal level of government.
- Back in June I was able to accompany the Town Administrator to Bartlett, New Hampshire to attend the annual conference at the Attitash Hotel and Conference Center. That was another great networking opportunity where I was introduced to many Town Administrators and City Managers.
- I was introduced to Bill Herman of Auburn, who recommended one of the vendors in this report, I met a past classmate Seth MacLean who introduced me to his father, the City Manager of Keene, and I caught back up with Michael Branley of Frankestown, who was one of my original interviewers.

- Since the annual conference and job shadowing, I have been analyzing the different departments and storage areas throughout Stratham.
 - I have helped clean up the maintenance area, the Municipal Center basement, and the Police Department's Cold Storage and downstairs records room.
- In August, Paul Deschaine helped me out and sent out a blaster email to most of the Town Administrators / City Managers in New Hampshire referencing my inquiry as to what electronic content management (ECM) solution (if any) each town was using.
- About 15 towns / cities ended up responding in one way or another and led me to the 6 vendors discussed later in this report.
- This report begins by giving information on each department and storage area, pictures are included. The report includes the department / storage areas' needs, any work accomplished, and a recommended plan for each specific area.
- To summarize:
 - The maintenance area has been reorganized by myself and includes records for Finance, the Town Treasurer, the Town Clerk, and Parks and Recreation.
 - Administration (including the Town Administrator's office, Finance's office, Park and Recreation's office, the Town Administrator assistant area, and printer area) are not out of control, but the Town Administrator's office should be reorganized to move old records into the mezzanine or Municipal Center basement.
 - The Land Use Department (including Assessing, the Building Inspector, and the Planning Department) probably needs the most help. The Planning Department is very behind in scanning building plans and permits onto Avitar. Scanning would allow the Town Planner to clean out the dozens of binders and antiquated building plans and move them to the mezzanine for permanent storage.
 - The Police Department, Fire Department, and the Library are all set. Boxes of records were shredded for the police and library. The Fire Department is not a priority (as a volunteer department with no full time workers) and there is a plan to use their 3-in-1 printer/scanner/copier to keep the records organized.

| --- | Climate Controlled | Can be Locked Down | Categories of Records Allowed |
|------------------------------|----------------------------------|------------------------------------|---|
| Municipal Center Basement | IS NOT climate controlled | Locked by padlock within bulkhead | Only Categories 3 & 4 Allowed |
| Maintenance Area | IS climate controlled | Locked by door within Admin area | Only Categories 3 & 4 Allowed |
| Highway Department Mezzanine | IS climate controlled | Locked by door within garage | All Categories 1 – 4 Allowed |
| Town Clerk Vault | IS climate controlled | Dial locked within Town Clerk area | All Categories 1 – 4 Allowed |
| Police Cold Storage | IS NOT climate controlled | Locked by door within station | Only Categories 3 & 4 Allowed |

- Next are the various companies I have been in touch with:
 - Absolute Data Destruction and Cintas are 2 shredding companies. ADD was used for the police department's shredding in September. I recommend that a company be used once a year to purge all expired retention schedule records.

| --- | Cost to Implement | Expected Life of Product | Computer Program Solution? | Company Provides Shelving? | Company Provides Indexing? |
|---|--|--------------------------------------|-------------------------------------|---|---|
| King Information Systems | \$5,050 to consult before designing plan | Depends on plan that KIS implements | No computer program solution | Company can provide shelving | Company can index records manually |
| DocStar – PiF Technologies | Up to \$22,000 to implement | Estimated to last until 2050 | Only a computer program solution | Company does not provide shelving | Company can index records through comp. program |
| Dupont Storage Systems | Up to \$7,275 to install 20 shelving units | Lifetime warranty for shelving | No computer program solution | Company only provides a shelving solution | Company does not provide indexing |
| RICOH USA | \$200,000 to scan everything | Online legal copy of records forever | No computer program solution | Company does not provide shelving | Company can index records manually |
| Treeno Software - Conway Office Solutions | Up to \$9,095 to implement on Stratham's servers | Estimated to last until 2050 | Computer program solution available | Company does not provide shelving | Company can index records through comp. program |
| Inception Technologies | Estimated \$17,916 to scan 557,000 pages | Online legal copy of records forever | No computer program solution | Company does not provide shelving | Company can index records manually |

- In the end after analyzing the specific department needs and the strategic plans of each vendor, I would suggest that the town of Stratham invest in a DocStar solution. Stratham does not have tens of thousands of dollars to invest in a large scale records project like Dover or Nashua could. DocStar would allow any department to scan their documents in the program, depending on the amount of licenses bought (Land Use could share for example). Instead of saying Parks and Recreation is not a scanning priority, while the Town Planner is, instead they could both use it for as little or as much as they wanted to scan. DocStar would also last a while where the program just needs to be continuously updated, while another vendor solution will need continued allocations of money to scan new records in the future. The representative, Larry Marino was also very intelligent and not aggressive for a vendor. PiF Technologies (the seller of DocStar) only focuses on the DocStar program and would be very supportive in any issues that might come up when learning the new solution.

Storage Areas and Departments

Maintenance Area



Picture of maintenance area from the door.

This picture was taken before I organized the shelves.

Maintenance Area - Walking inside on the right wall

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



Bankers Boxes:

- [2] Old ZBA Cases #119-190 from 1980s
- [2] Building Permits 2001-2005
- [2] Invoices 1997-2003
- [2] Two Misc. from 2000s including permits, emails, planning dpt. Information
- [2] Misc. Treasurer / Town Clerk Receipt Books
- [2] 2001-2005 audits / yearend reporting
- [2] Three Misc. Treasurer Records not labeled
- [2] Box labeled Walmart with binders and planning maps inside

2 vertical 4 drawer file cabinets:

- [2] Seven drawers filled, One empty drawer with Trustees of the Trust Funds

[2] 1980s-present manila folders filled with Misc. papers, reports, paychecks

1 Small cardboard box:

[2] Misc. ZBA Tapes labeled 1-1000 #195

1 vertical 5 drawer file cabinet:

[2] Three drawers of Misc. Town Treasurer 1960s-2000s

Board of Selectmen MTGS Audio Tapes:

[3] 06/02/03-12/20/04

[3] 01/03/05-05/22/06

[3] 06/05/06-10/01/07

[3] 11/2010-2/2011

[3] 10/04/07-09/29/08

[3] 10/06/08-09/28/09

[3] 04/2010-10/2010

3 clear plastic tubs:

[3] 2011 A/P (A-I)

[3] 2011 A/P (J-S)

[3] 2011 A/P (T-Z)

Room Reservations for Stratham Municipal Center:

[3] Two binders 2010 + 2011

2 Small cardboard boxes:

[3] Old ZBA Tapes labeled 2004-2007

[3] Old ZBA Tapes not labeled, but containing 2007-2009

Bankers Boxes:

[3] A/P 2007 (A-N)

[3] A/P 2007 (O-Z)

[3] A/P 2009 (S-Z)

[3] A/P 2009 (M-R)

[3] A/P 2009 (A-L)

[3] Invoices 2004-2009

[3] 2007 A/P, Payroll, Revenue, JE Journals

[3] 2008 Payroll timesheets / cash book recon.

[3] 2011 timesheets / payroll journals, revenue + tax receivables

[3] Misc. Treasurer Record's years prior to 2012

[3] Accounting Journals 2010

1 vertical 4 drawer file cabinet:

[4] 2013 A/P (C-M)

[4] 2013 A/P (N-Z)

[4] 2012 A/P (A-L)

[4] 2012 A/P (M-Z)

1 vertical 5 drawer file cabinet:

One drawer empty

[4] One drawer 2013 A/P (A-B)

Bankers Boxes:

[4] 2012 Payroll + Bank Statements

[4] Deposits/JE + Budget Reports 2012

[4] 2013 Timesheets A/P + P/R Journals

Maintenance Area - Walking inside on the back wall

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



Bankers Boxes:

[2] Old 1996+1997 energy facility application and certificate binders

[2] Town Treasurer Records 1999-2005

[2] 2004 Town Treasurer + 2003 Bank Statements

[2] Stratham Hill Park Association Records

[2] Town Treasurer Bank Statements 2005

[2] Town Treasurer 2002 Cash Account + Payroll Account

1 clear plastic tub:

[3] Misc. NH Law Books

Bankers Boxes:

- [3] Recreating Revolving 2011
- [3] 2009+2010 Recreation Revolving A/P
- [3] Recreation Revolving Accounting 2007
- [3] 2008 Recreation Revolving Accounting
- [3] 2011 Motor Vehicle Registrations A-R
- [3] 2011 Motor Vehicle Registrations S-Z
- [3] Town Treasurer 2006 Bank Statements
- [3] Town Treasurer 2007 Payroll + Cash Accounts
- [3] Building Permits 2007-2008
- [3] Building Permits 2008-2010

Bankers Boxes:

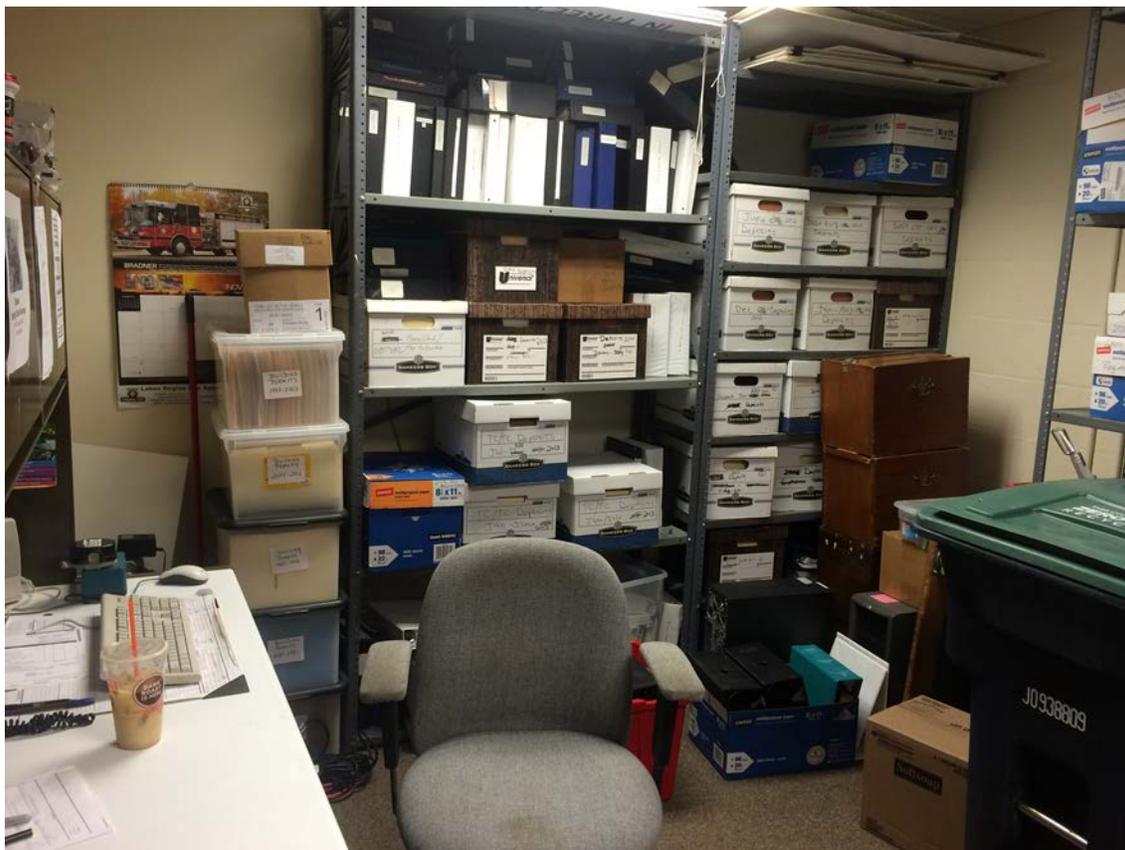
- [4] Recreation Revolving 2012

Maintenance Area - Walking inside on the left wall

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



Clear tub of binders:

[2] Twenty+ binders from Town Clerk containing tax collector, town warrants, deposits during 2000s

4 clear tubs of Building Permits:

[2] 1967-1986

[2] 1987-1991

[2] 1992-1997

[2] 1998-2003

Dozens of Binders:

[2] One specific binder containing 1968-1975 Selectmen Minutes

[2] Three Tax Collector Binders 2004

[2] [1987-2000 Selectmen Minutes](#)

Dozens of Binders:

[3] [2001-2007 Planning Board Minutes](#)

[3] [2001-2010 Selectmen Minutes](#)

Clear tub of Building Permits:

[3] [2004-2006](#)

Bankers Boxes:

[3] [Five Town Clerk / Tax Collector Deposits 2009](#)

[3] [Five Town Clerk / Tax Collector Deposits 2010](#)

[3] [Four Town Clerk / Tax Collector Deposits 2011](#)

Bankers Boxes:

[4] [Five Town Clerk / Tax Collector Deposits 2012](#)

[4] [Three Town Clerk / Tax Collector Deposits 2013](#)

[4] [2012 Motor Vehicle Registrations](#)

Information:

- The maintenance area is currently being used as storage for Finance, the Town Treasurer, the Town Clerk, and Parks and Recreation.
- It is also being used to store miscellaneous things such as decorations, old computer equipment, ladders, floor carts, ballot boxes, etc.
- In order to get to most bankers boxes you must navigate around these miscellaneous objects and move them across the room, especially when they are blocking the bottom shelves.

Work Accomplished:

- I went in and organized the maintenance area. Finance now has the right side, the Town Treasurer and Parks and Recreation have the middle, and the Town Clerk has the left side of the maintenance area for their records.
- Miscellaneous objects have been consolidated together and moved out of the way from accessing current records.

Recommendations:

- I would recommend moving most miscellaneous objects out of the maintenance area and into the Municipal Center basement for storage.
 - This would include old computer equipment, extra ballot boxes, etc.

- Permanent items on the retention schedule should also be moved to the Municipal Center basement to make room for 2014 records that will be moved in the maintenance area in a couple of months.
 - This would include many of the Town Clerk's binders containing board minutes that must be held onto. Also many of the Town Treasurer's financials before the 1990s, which are rarely accessed should be moved to the basement.
- This will allow for the fluid transfer of new items into the maintenance area and removal of expired retention schedule records at the end of each year.
- The binders are now organized by year and type (Board of Selectmen Minutes, Planning Board Minutes, Town Clerk's annual tax records) on the left side of the maintenance area.



Changes made to Maintenance Area

Town Clerk's Vault



This picture was taken from the vault door.

As you can see files are scattered throughout the vault.

Files are lumped on top of the shelves and binders are not consolidated together (white tax binders on right side and top left of this picture)

Town Clerk's Vault - Walking inside on the right wall

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [1] Thirty extremely old and delicate vital records books
- [1] Eight delicate scrap books:
 - Misc. minutes, records of appointments, general fund records
- [2] Bankers Box of town handbooks and manuals
- [2] Clear plastic tub from 1970s-1980s
 - Fifteen+ town master plans, solid waste management plans, sewage / soil type plans
- [2] Two drawers of planning board minutes
 - 1980s-1990s information in binders and manila folders within drawers
- [3] Primex insurance membership agreement binders
- [3] Ninety+ binders from 2004-2013:
 - Tax warrants, detailed receipts, EREG logs, transaction reports, end of year reports, prepayments, selectmen notices, credit assessments, beginning balances, budget expenses / revenues, tax collector books
- [4] Eighteen newly binded vital records books
- [4] Eight newly binded town records books

Town Clerk's Vault - Walking inside on the back wall

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [1] Thirty+ Misc. scrapbooks and ledgers from 1900 on top of shelves
- [1] Clear tub of 20+ delicate ledgers
- [1] Sixty+ very delicate tax books from 1950 or before on top of shelves
- [2] Five binders of vitals from 1990-2000
- [2] Twenty delicate tax warrant books from 1980-2000
- [2] Thirty+ Misc. newer tax books spread out on top of shelves
- [3] Bankers box of school district votes
- [3] Two cabinets of vitals from 2000-present
- [3] Eight shoe boxes of MTG notices, liens, and deeds
- [3] Five boxes of cemetery plot and cremation plot information
- [3] Three bankers boxes of Municipal Agent work
- [4] Two boxes of 2013 motor vehicle registrations
- [4] Two boxes of 2014 motor vehicle registrations
- [4] Various election material
 - Forms, envelopes, ballots

Town Clerk's Vault - Walking inside on the left wall

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [2] One vertical 4 drawer file cabinet
 - Historical society, 3 drawers of deposits
- [2] One vertical 5 drawer file cabinet
 - Accident / incident reports, tax notices 1992 and older, 1993-2000 liens, town deeds, and wetland applications
- [3] Single cabinet of all federal liens
- [3] Various manila folders of court cases on top of file cabinets
- [3] One vertical 4 drawer file cabinet
 - 2000-2007 tax notices, wetland applications, bankruptcies / foreclosures
- [4] One vertical 4 drawer file cabinet
 - 2008-2011 tax notices, municipal agent supplies, current use, cemetery information
- [4] One vertical 4 drawer file cabinet
 - Town election checklists, state election checklists, federal elections, town deeds
- [4] One vertical 4 drawer file cabinet
 - Checklists, 2012-2014 credit card / ACH, various board minutes, 2007-2008 lien notices

Information:

- The Town Clerk's vault is the most important storage space that Stratham has.
- As it is the most secure and climate controlled, the most delicate records and frequently used records should have the vault space to use. Versus moving records further away or in an area prone to moisture like the Municipal Center basement.

Recommendations:

- I would recommend reorganizing the vault.
- All delicate records should get a particular section of the vault.
 - Currently vitals from the 1800s are on the right side of the vault, while old tax warrants from the 1940s are on the back wall spread out on the top shelf.
- Any records older than 2012 should be moved to the Maintenance area or the Municipal Center basement.
 - For example, the 2004 binders that contain tax warrants, end of year reports, budget information, etc. (Records not category 3 or 4) are not gone back to frequently and can be moved out of the limited space the vault has to offer.
- That would allow for a much needed cleansing of the vault. All vitals together, all tax warrants together, all annual tax reports in binders together, all vehicle registrations together, all of the election records together, and all new minutes together.
 - Vitals and tax warrants must be kept forever and therefore deserve the vault space.
 - Annual tax reports older than 2 years should be moved to the Maintenance area or the Municipal Center basement so they can be easily accessed, yet not taking up vault space.
 - All types of Board minutes older than 1 year should be moved to the Maintenance area or boxed up and moved to the Municipal Center basement.

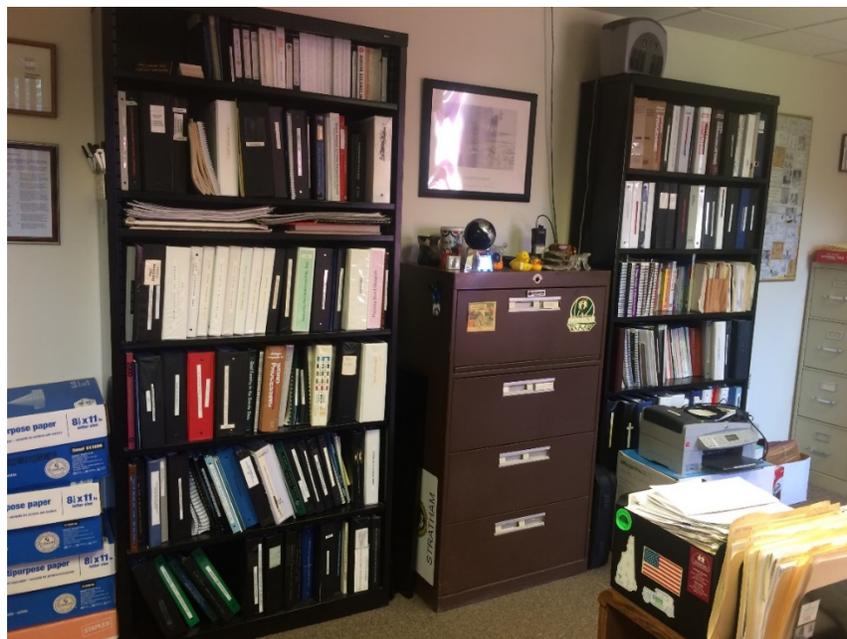
- If a scanning vendor is used, Board minutes and annual reports could be scanned, so the binders could all be boxed up and moved to the Municipal Center basement where they could just remain since the information would be easily assessable online.

Town Administrator's Office

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [2] Two 6 shelf bookcases
 - Contains close to 90 binders, reports, and VHS tapes throughout the 1990s and 2000s
 - Including: Annual Reports, Wage Salary Benefit Surveys, Zoning Ordinances, ZBA Handbooks, Budget Reports, Timesheets, Police Operating Procedures, Wetlands Rules, Assistance Manuals
- [2] One Brown 4 drawer filing cabinet
 - Contains various files from 1986-2008 in manila envelopes
 - Including: Public Service Contracts, Warrant Articles, Tax Year Budgets
- [3] Ten 4 drawer filing cabinets
 - Contains A-Z files for individuals and properties in alphabetical order
 - Including: Contracts, RFP's, Bids, Landfill Closure, Lamprey Coop, Barn Easements, Substance Abuse Testing, Active Performance Bonds, Closed Performance Bonds
 - Also includes binded files on top of the filing cabinets as well.

Recommendations:

- The Town Administrator is pretty organized, but the dozens of binders and VHS tapes from before 2000 probably do not need to remain in his office.
- I would recommend that the Town Administrator move some of his files into the Maintenance area.
 - Old VHS tapes and various manuals can be moved out of the Town Administrator's office, but stay within the administration section of the Municipal Center.
- By removing unused binders and tapes from the bookcases, the Town Administrator will be able to make room for newer binder and reports that he will receive at the end of the year.
- If a scanning company is used, I would recommend scanning the Town Administrator's most popular documents such as Active Performance Bonds, RFP's, open contracts, etc.
 - If all of his A-Z files were scanned, the paper copies within the file cabinets could be moved in bankers boxes to the Municipal Center basement with the copies now secured on his hard drive.
- There will always be a need for the Town Administrator to have paper records, there is no such thing as going paperless. If his most important documents were scanned, it would make it easier for him to find them in an electronic depository.
 - One could then even move a full filing cabinet down to the Municipal Center basement to make room for a newer filing cabinet, or could just box up the old records and ship to them to mezzanine to be saved forever in a climate controlled environment.

Parks and Recreation's Office

Category Conditions: 1-4

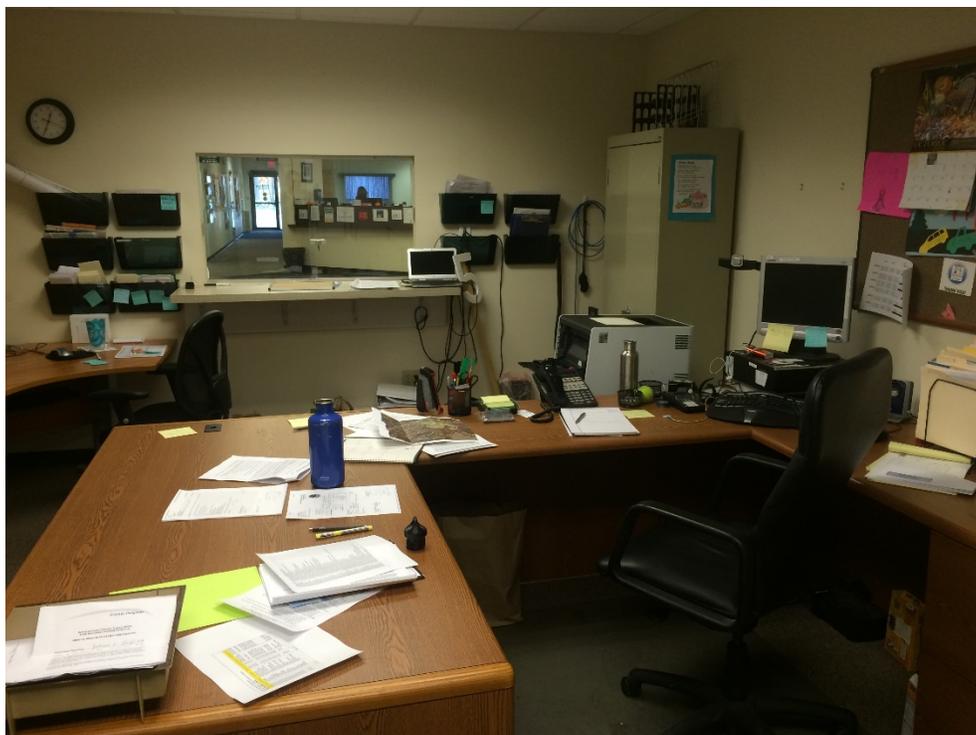
1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



Parks and Recreation's records within in office

Besides the records in the Maintenance area and spread out on the desk



- [3] Three 4 drawers filing cabinets
 - 3 of the 12 drawers are empty
 - Contains various binders and manila folders
 - Including: Current Programs for all Sports Teams, Previous Budgets, Stratham Hill Park Records, Stevens Park Records, Fertilizing Records, Current Budgets, Rentals, HIPPA information, Training, Cell Phone Records

Recommendations:

- I would recommend leaving Parks and Recreation's records alone.
- Parks and Recreation has one shelf worth of old records in the Maintenance area.
 - They could actually be moved to the Municipal Center basement, since he does not go back into his past records frequently.
- Parks and Recreation has his active records in his office filing cabinets, which are not completely full.
- Most of Parks and Recreation's other records are on his hard drive, so scanning would not be extremely useful.
- Parks and Recreation has no real pressing need to manage their records.
 - A part-time worker has actually been helping Parks and Recreation get caught up on its records.

Behind Town Administrator Assistant Desk

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [4] Two 4 drawer filing cabinets
 - Contains 2 drawers of Public Assistance
 - Contains 2 drawers of Open Space Subcommittee
 - Bottoms drawers are empty
- [4] One 6 shelf bookcase
 - Contains binders and manuals
 - Including: 2012-2015 Board of Selectmen Minutes, 2012-2015 Reservations, Standard Operating Procedures, Employee Manual, Seacoast MPO, 2004-2014 Annual Reports

Recommendations:

- I would recommend not touching any of these.
- The filing cabinets are frequently accessed and are not completely full.
- The bookshelf still has room and only contains the past couple of years' worth of records.
- There is no pressing need to rearrange or move any of these files.
 - If a scanning company came in it would make sense to scan this recent records that will be gone back to, but that includes the bookcase binders, not the filing cabinet records with public assistance cases.

Printer Area before Maintenance Area

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [3] Three 3 drawer cabinets
- [3] 1st cabinet contains maps, binders, and notebooks for the Conservation Commission
- [3] 2nd cabinet contains binders, well surveys, annual GCNE monitoring for the Water Commission
- 3rd cabinet is empty

Recommendations:

- Do not touch anything.
- These cabinets are used more as a tabletop than for the records, which are again not completely full.
 - Tabletop for printing, stapler, paper clips, hole punch, etc.
- There is no need to move the files from the cabinets as there is plenty of room left to add to more records inside. Also no need to scan these infrequently used records.

Town Assessor's Office

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [4] Two 4 drawer filing cabinets
 - Contains conservation easements, BTLA property appeals, Barn easements, Subdivisions for different style models of homes
 - [4] Three 2 drawer filing cabinets
 - Contains research on sales, Condo information, Mapping information, Equalization studies, Budget years and receipts, Selectmen agendas, 2009 Assessment Information
 - [4] Six shelves containing 30 binders worth of research for open cases.
-

Recommendations:

- The Town Assessor's room is pretty meticulous.
 - Everything is cleaned off her desk before she leaves for the day.
- The Assessor knows where everything is and still has plenty of space within her own filing cabinets.
- I wouldn't recommend moving any files.
 - Most files are constantly reviewed within the 5 years leading up to an assessment.
 - Files are also kept online through Avitar.
- New assessment cards are already scanned online for the public terminal.
- If a scanning company came in the Assessor would have no huge need.
 - The Assessor likes to print hard copies either way, so scanning what she would just print back out, when she has the storage space anyway, would be a waste.
- Any old assessment cards (now 2004 or before) could be boxed up and moved to the Municipal Center basement, along with any old maps, since they are again already online in Avitar.

Assessing Assistant's Office

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [4] Nine 4 drawer filing cabinets
 - 5 drawers out of 36 are empty
 - Cabinets includes Maps 1 – 29 for assessing Stratham’s properties
 - Also includes Current Use, Exempt Properties, Financial information on Churches/Elderly/Schools/Veterans
 - 20 binders on top of the filing cabinets just need to be put away, they are still out due to the 2014 assessment winding down.

Recommendations:

- I would recommend nothing for the Assessing Assistant’s area either.
- 5 drawers in the filing cabinets are still empty.
- Anything that might look disorganized, like the binders on top of the filing cabinets, are waiting to be put away since the last assessment just ended.
- If a scanning company came it, it might be useful to scan Maps 1-29, but the actual assessing records are unnecessary since they are already organized and indexed via map number.
- The need to rearrange any records is completely unnecessary. Assessing has the space, empty filing cabinets, and most information is already online through Avitar.

Building Inspector's Office

Category Conditions: 1-4

- 1=Rarely used/moved; delicate.
- 2=Occasionally used/moved; aging.
- 3=Annually used/moved; decent.
- 4=Frequently used/moved; great.





- [3] Flat drawer filing cabinets containing 35 drawers
 - Includes site plans to all commercial buildings and residential buildings if they are subdivided
- [3] Three bookcases with various shelves
 - Contains about 50 binders and manuals
 - Including: Building Permit Information, Zoning Violations, Mitigation Plans, 10 National Fire Codes and Standards books

Recommendations:

- I would recommend nothing for the Building Inspector at the moment.
- Changing anything at the moment would be premature since she is still new and getting used to the way the ex-Building Inspector had things organized.
- The Building Inspector has plenty of room for the various binders and manuals upon her bookcases.
- If a scanning company came in, it would be useful to scan the site plans within the flat drawer filing cabinets.
 - Those plans would still need to be kept in her office permanently, but there is no lack of space and no influx of new commercial buildings being built either.

- Once she is settled, the Building Inspector could opt to move some of the 50 binders to the Municipal Center basement if she finds that they are unnecessarily taking up space and she is not accessing them.

Land Use Assistant's Area

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.







- [3] Thirteen 4 drawer filing cabinets
 - Contains all Stratham property files with permits alphabetically A-Z
- [3] Three 3 drawer filing cabinets
 - Contains tapes and binders
 - Including: ZBA cases up to #500, Planning Board, Conservation Commission, Land Use Projects
- [4] Two 3 drawer filing cabinets
 - Contains Open Files
 - Including: Planning Board, Building Files, ZBA Cases
- [4] One 3 shelf bookcase
 - Contains 15 binders for Open files, recent Planning Board minutes, Land Use projects

Recommendations:

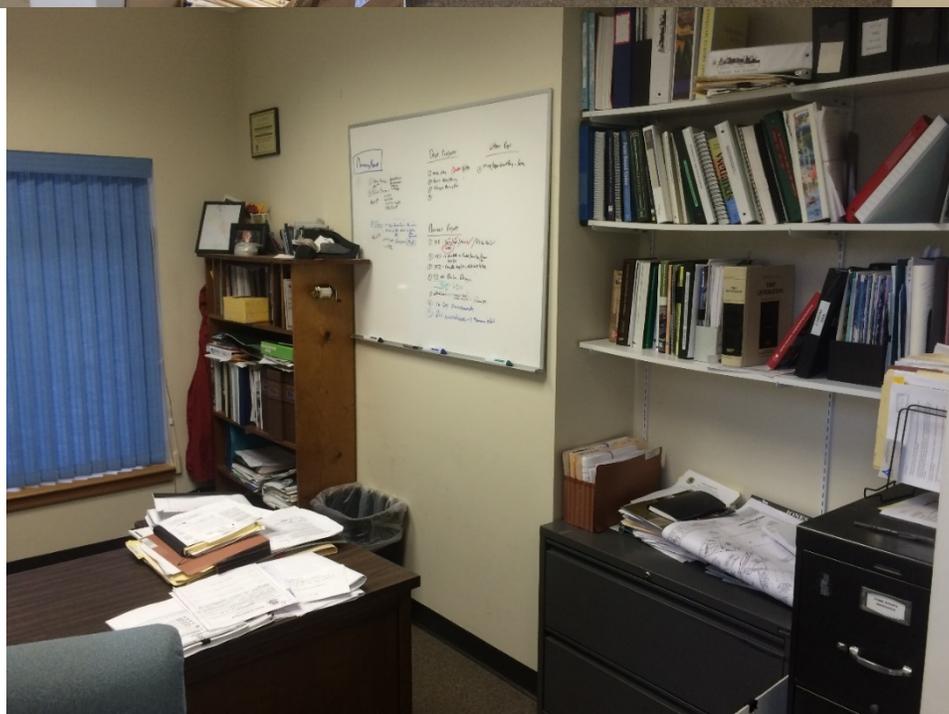
- The Planning Department needs to hire a part time worker to help scan all Stratham property files.
 - Unless a scanning company is hired to do this.
- All new permits and building plans that come into the Planning Department are either sent electronically or scanned immediately before they are put into the property file.
 - Everything scanned into Avitar is then available online.

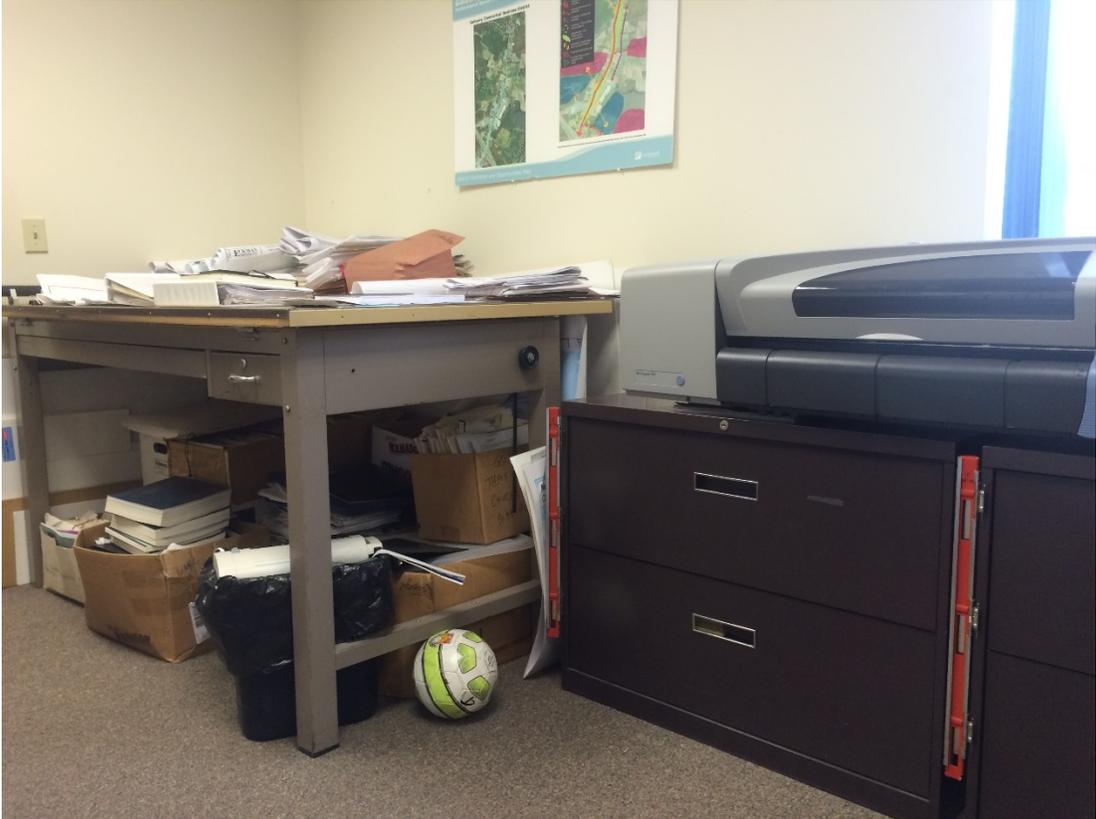
- Extra copies of building permits that were sent to Joyce in the past (and taking up space in the Maintenance area) are no longer done. Market researchers now contact the Land Use Assistant to make a copy.
 - So the extra building permits should be moved to the Municipal Center basement or integrated into existing building permits.
- Property files are permanent and must be kept in the Land Use Assistant's area, but old Planning Board and Conservation Commission binders should be moved to either the Maintenance area or the Municipal Center basement.
 - Planning Board and Conservation Commission binders that include minutes and files should be moved outside of the Planning Department after 1 year. Whether they be moved to the Maintenance area or the Municipal Center basement, they will still be accessible and taking up less in the packed Planning Department when they are not used frequently after the past year.

Town Planner's Office

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.
3=Annually used/moved; decent. 4=Frequently used/moved; great.





- [3] Fives shelves of about 70 binders
 - Old regulations, Current Committees, Forms and Budgets, Past Projects
 - [3] Bookcase of 20 binders
 - Contains Planning Board minutes and files, Conservation Commission minutes and files
 - [3] Eight cardboard boxes under a table
 - Contains antiquated building plans and permits
 - [4] Seven 4 drawer filing cabinets
 - Contains various commercial and residential property maps, Zoning Ordinances, Conservation Commission, Current Projects
-

Recommendations:

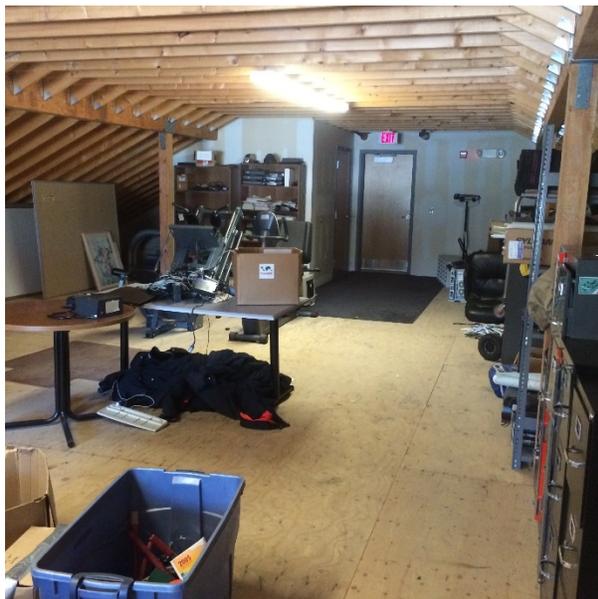
- The Town Planner's office is very cluttered. There is not a huge variety of records, most are binders or wide format building plans.
- The problem is that the Town Planner's office contains all the antiquated building plans, Planning Board minutes, Conservation Commission records, etc.
- The Town Planner's office needs to be reorganized.
 - Old binders that are not used should be boxed up and sent to the Municipal Center basement. Antiquated building plans should be scanned and moved to the Municipal Center basement as no one is going to ask to see building plans for the 1950s very frequently.
- A scanning company or a part time worker should work with the Land Use Assistant to scan into Avitar all wide format building plans. With all building plans scanned, they can be moved into the respective property files in the filing cabinets, or be boxed up and moved to the Municipal Center basement or the mezzanine for climate controlled storage.

Police Department

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



I never got the chance to take a before picture, but on the left side is the Cold Storage, where over 100 bankers' boxes were. Some of the officers and I went through them all, shredded 90 boxes, and moved the rest to the Records Room on the right side, which is still being organized by year.

- Cold Storage in the attic has been completely cleared of records
- [3] Downstairs includes Ten 4 drawers filing cabinets of all accidents, incidents for the past 10 years, and juvenile files

Work Done:

- Spent hours organizing the Police Station's records.
- Went through 100+ bankers' boxes with Stacey and other officers to determine what was past the retention schedule and what had to be saved.
- Absolute Data Destruction then came in and shredded 90 bankers' boxes.
- All remaining records have been moved to downstairs storage area.

Recommendations:

- Do an annual purge of old records.
 - Hire Absolute Data Destruction to come at the end of each year to shred old incident and juvenile files.

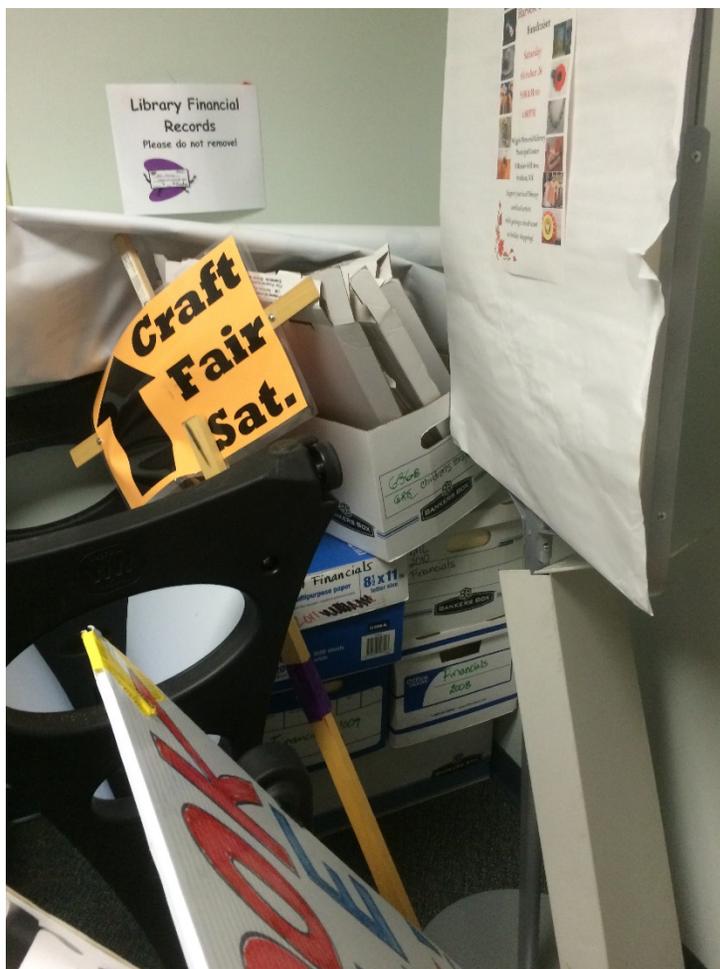
- The Police Department is now very organized in its records storage and the Cold Storage in the attic is now free of hundreds of bankers' boxes.
- The Police Department currently have no real pressing need as they are not interested in scanning old files.
 - The Police Department knows it would be expensive based on when Epping Police Department implemented DocStar for \$18,900 a couple of years ago. Their current IMC program makes all new files start in the system before being printed out into a file folder, but scanning old documents into IMC is not a pressing goal at this time.

Library

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



- [3] The Library Director has 7 bankers boxes that include end of the year reports and budget information for the previous 7 years

Recommendations:

- Despite the picture, the Library Director is doing fine with space. The closet with the Library's financial information is used more for book sale items than for her records storage.
- I would recommend doing nothing for the Library. No scanning or moving records is necessary.

- The Library Director was able to get rid of 5 bankers' boxes worth of expired retention schedule financial information during the police station purge, so the Library Director was quite happy to cut the records need down almost 50%.

Finance Office

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.





- [4] Five 4 drawer filing cabinets
 - One 4 drawer filing cabinet for Treasurer records and deposits
 - Four 4 drawer filing cabinets
 - Includes payroll information for employees in alphabetical order
 - Includes active / inactive employees
 - Workers comp claims
 - Audits / Year End
 - Fire Department
 - Payroll Quarterly Reports
 - Road Bonds
 - Monthly budget reports

Recommendations:

- The Finance office space is very organized.
- All files are labeled and within the filing cabinets.
- All files are neatly labeled and organized in the Maintenance area on the right wall for financials and on the back wall for treasurer records.
- If a scanning company came it, it might be helpful to scan the treasurer records that are antiquated going back to the 1960s.
- Financial records are shredded after 7 years and are only gone back into a couple times per year so scanning would not be the highest priority.
- I would recommend doing nothing as of now since financial records are organized within their department and in the Maintenance area.

Fire Department

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.



Recommendations:

- I would recommend once the new server is online, that the Fire Department use its 3-in-1 printer/scanner/copier to get more organized with their constant records coming in from the mail.
- The Fire Department has their employee records locked up in a filing cabinet.
- Mail such as fire extinguisher inspections, equipment information, financials, etc. are scattered on the Chief's desk.
 - As a volunteer Fire Department it is hard to keep all the documents organized.
- The hope is that if the 3-in-1 used, then whenever the department gets any new records they can scan it and have it on their hard drive to access later, rather than searching throughout weeks' worth of mail on the Chief's desk.
- IT has offered to help show them how to use it when he has time.
- The Fire Department is a lower priority as employees are volunteer and they have plenty of room for their records in their new building.
 - They just need to scan the few mail records that continuously get to stay on top of steady stream of records that they must hold on to for at least a year.

Highway Department Office

Category Conditions: 1-4

1=Rarely used/moved; delicate. 2=Occasionally used/moved; aging.

3=Annually used/moved; decent. 4=Frequently used/moved; great.





- [3] Five shelf bookcase
 - Contains 50 binders and manuals
 - Including: MSDS information, Snow and Ice Policies, Waste Manifests, Loss Prevention Manuals, Zoning Regulations, Land Use Regulations, Cemetery Information
- [4] Desk shelf
 - Contains 12 binders
 - Including: Vehicle Registrations, 2009-2014 Budgets, Safety Programs and Policies, Transfer Station Permit Logs

Recommendations:

- The Highway Department office is pretty organized.
- All open files are on the shelf above the desk and the remainder of the records are on the bookcase.
- There is plenty of room in the mezzanine if the Highway Department decides to move unused binders and manuals.
- Scanning is not necessary for the Highway Department since they are on top of their records and most records are on the computer hard drive like Parks and Recreation, which print out records to be filed later.

Highway Department Mezzanine

Category Conditions: 1-4

- 1=Rarely used/moved; delicate.
- 2=Occasionally used/moved; aging.
- 3=Annually used/moved; decent.
- 4=Frequently used/moved; great.







- New shelving put together that supports 600lbs per shelf, 1500lbs once the Highway Department braces them if they end up being used as permanent storage
- Other items in mezzanine for high department include:
 - Bundles of hay, old tarps, wooden stakes, hose and buckets, personal items, ceiling tiles, gallons of paint, gallons of de-icer, cemetery flags, and street signs
- [2] **Dusty old cardboard box containing:**
 - **Time Logs, Storm Recordings, Financial Information from 1993-2009**

Recommendations:

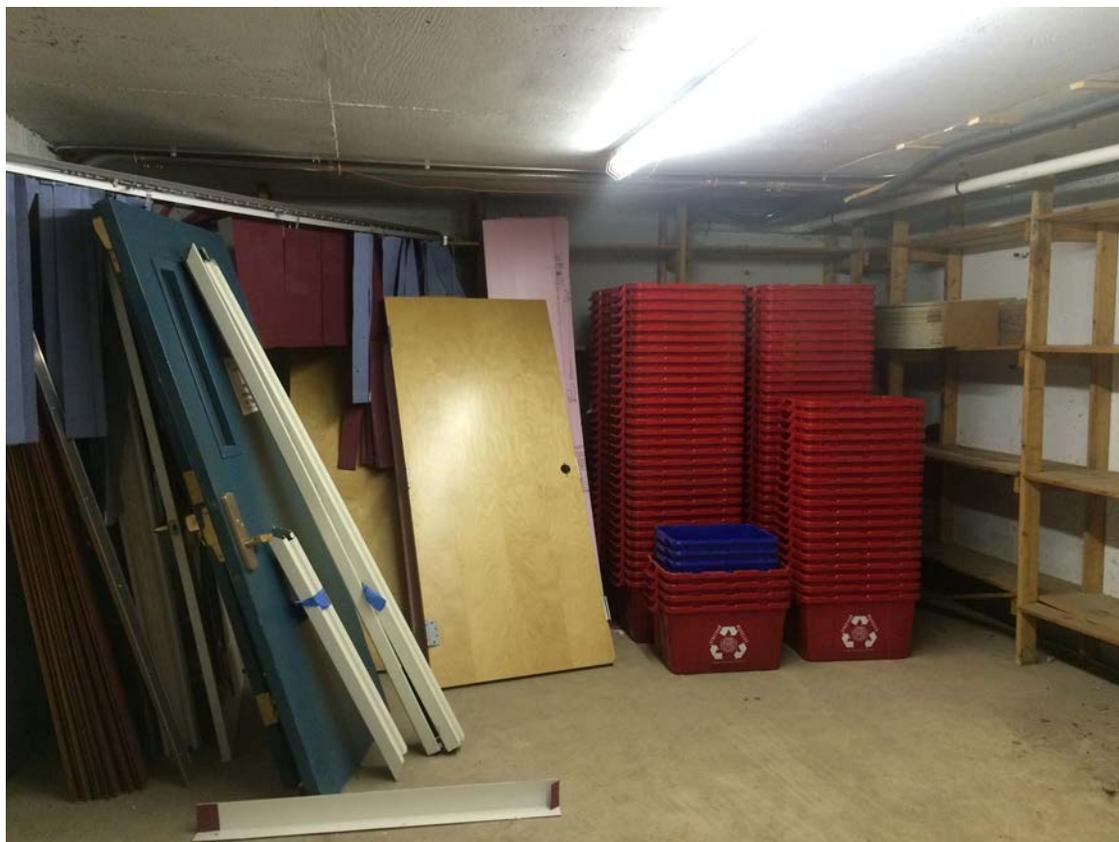
- The Highway Department should put their old records into a filing cabinet versus having them in a dusty old cardboard box.
- It is not a priority since the Highway Department does not go back to past records often. No need to scan the old information since it is rarely gone back to.

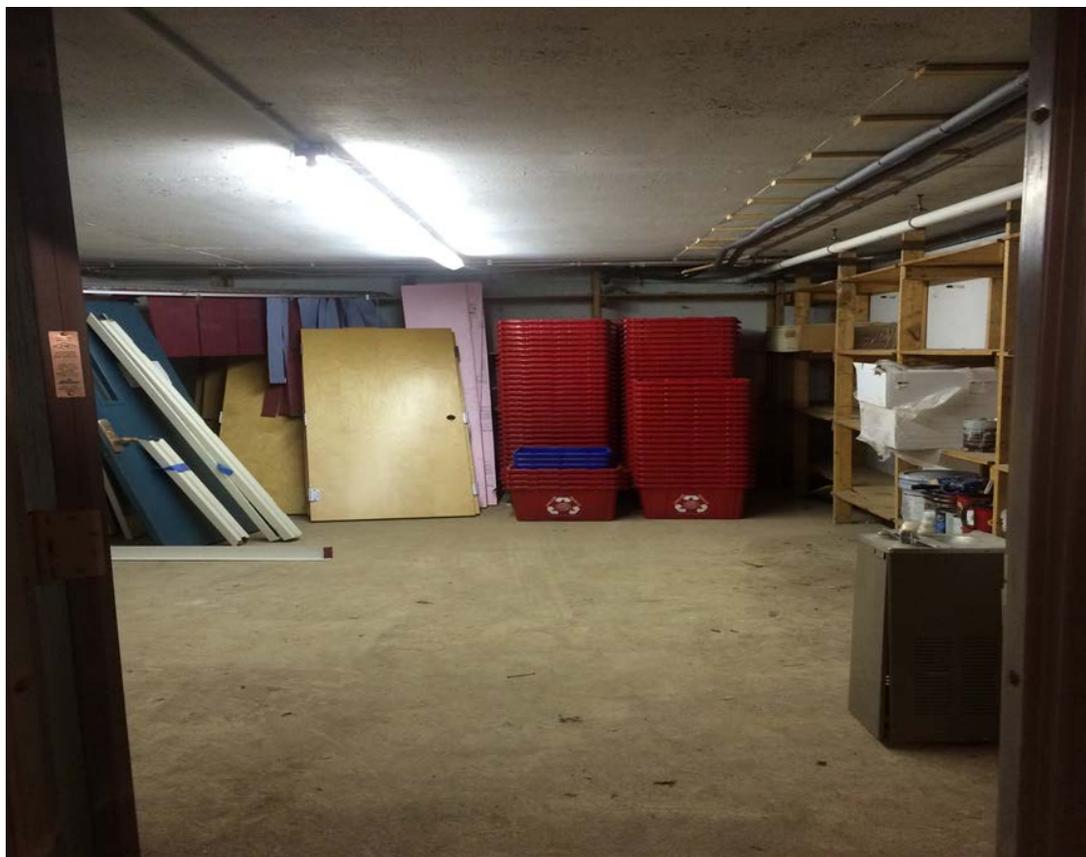
Highway Department Mezzanine as permanent storage

- The Highway Department was nice enough to set up the shelving you see in the picture above. Once they are braced, each shelf will support up to 1500lbs! The current support of 600lbs is already adequate if they are going to be used just for records.
- I would recommend using the mezzanine as permanent storage for any department that is looking to get antiquated records out of their department.
- I would recommend that the Town Planner scan his antiquated building plans and then box them up to be stored in the climate controlled mezzanine or to integrate with current building plans within the Planning Department.
- I would recommend that the Town Clerk send some of her permanent items to the mezzanine.
 - Most of the binders in the Maintenance area can be boxed up and sent to the mezzanine.
- As the mezzanine is climate controlled, 2 minutes away from the Municipal Center, and can be locked; the mezzanine is perfect to store permanent items that can never be destroyed according to the retention schedule.
- Any old binders of Board minutes or annual tax information older than the past 5 years should be boxed up and moved to the climate controlled mezzanine. They are infrequently accessed and take up more space than bankers' boxes.

Municipal Center Inner Basement



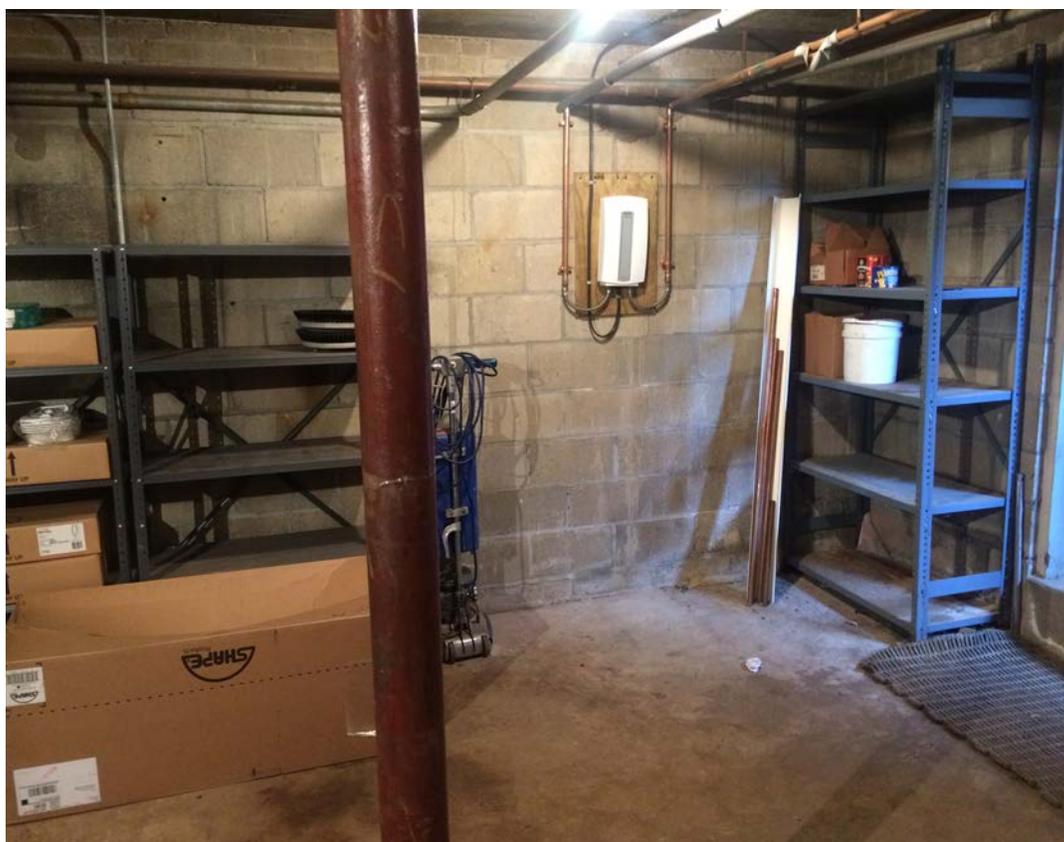




Municipal Center Outer Basement







Work Done:

- Myself and maintenance filled up one of the Highway Department trucks 5 times with old junk.
- There were old rugs, sinks, insulation, chairs, paint, tiles, toilet components, batteries, old style paper towel dispensers, emergency lights, old nuts and bolts, etc.
 - We went down first with the Town Administrator to discuss what was worth saving.
- Anything that maintenance could not reuse was thrown away or sold at the auction.
- Maintenance and the Highway Department removed the old cubicles once it was determined that none of the departments wanted them.
- The Highway Department has said that they will rip out the old sheet metal in the corner of the inner basement.

Municipal Center Basement as storage

- I would recommend, once the area is thoroughly cleaned, using the basement as extra storage for records that need to be kept for a long time, but not for ever. That way they can be accessed easier than the mezzanine.
- For example, if the financial records begin to take up too much of the Maintenance area, then records older than 2012 should be moved to the Municipal Center basement. That way the Financial Department can access them if they need and the records are out of the way since they are gone back to only a couple times each year. Then after 7 years they can be shredded.
- The inner basement is not climate controlled, but there is a sump pump and it never gets below 50 degrees (although moisture is still possible). It is still very valuable storage area. I wouldn't put delicate items down there, but delicate items are permanent items that should be in the vault or moved to the mezzanine anyway.
- If Dupont Storage Systems is used, then the inner basement would be transformed into rows of metal shelving, versus wooden shelving. This would allow for the inner basement to be used as storage for the building, even replacing the Maintenance area as a records storage area (the Maintenance area could then be just for maintenance equipment, clean supplies, town flags, decorations, etc.).

Shredding Companies

Absolute Data Destruction: as of September 2014

- Offsite destruction would be \$2.00/box minimum of \$50.00
- Onsite destruction would be \$6.00/box minimum of \$75.00
- All pickups are completely HIPAA compliant. Each invoice will provide a Certificate of Destruction for your records.

Cintas Shredding: as of September 2014

- Offsite destruction would be \$5.00/box.
- Onsite destruction would be \$9.00/box, \$10.00/box if they take the cardboard.
- No extra fees or charges attached to total.

Recommendations:

- Absolute Data Destruction was used at the police station to shred close to 90 bankers boxes.
- I would recommend that a shredding company be contracted to come to the Municipal Center once a year to purge all old files according to the retention schedule.
- Any Police Department, Fire Department, or Highway Department files can be brought to the Municipal Center to be shredded. This also includes any files that might be moved to the mezzanine or basement and are past their retention schedule.
- It is fairly cheap to do, if they came this year there is no way it costs >\$500, since it cost around that much to do 90 bankers boxes at the police station and there is no way all the other departments have 90 boxes to get rid of.
- This will also keep departments on top of their record needs since they will have a set date to transfer end of the year records to storage while eliminating old items. It could be a day of in house cleaning for all departments. If trucks are already moving records to the Municipal Center to be shredded, they can move records to be saved either to the basement or mezzanine that same day.

Vendors

King Information Systems is based out of Norwood, Massachusetts:

Lindsay Eisan is the account representative.

- Town Administrator, Jason Hoch of Litchfield, recommended King Information Systems as he has been using them for close to a decade.
- The way King Information Systems works is that they come in and do a full analysis on our current storage needs.
 - This is the \$505 consulting fee and Lindsay estimated that it would take 10 days or \$5050 to develop an appropriate strategy.
- Their strategies within their analysis include scanning, indexing, and selling equipment for storage needs.

Costs: as of September 2014

- Consulting Services \$505.00 per day plus expenses
 - Labor services \$260.00 to \$480.00 per day plus expenses for onsite implementation, document prep, file reorganization, purging etc...
 - Microfilm services \$0.05 per image for standard documents up to \$1.50 per image for large format documents
 - Scanning Services \$0.12 up to \$0.50 per image depending on indexing etc...
 - They also offer a full range of supplies and equipment for high density and archival filing.
-
- Lindsay is hoping to come in and spend 10 days to develop an appropriate strategy for each department, this can include doing nothing if it unnecessary for the respective department.
 - His proposal would then be presented to the Town Administrator for him to sign off on for what King Information Systems would do next. Most likely he would initiate scanning services for the Town Clerk and the Planning Department.
 - He mentioned that his company has the ability to convert microfilm and wide format drawing into an acceptable electronic form.

DocStar – PiF Technologies is based out of Hooksett, New Hampshire.

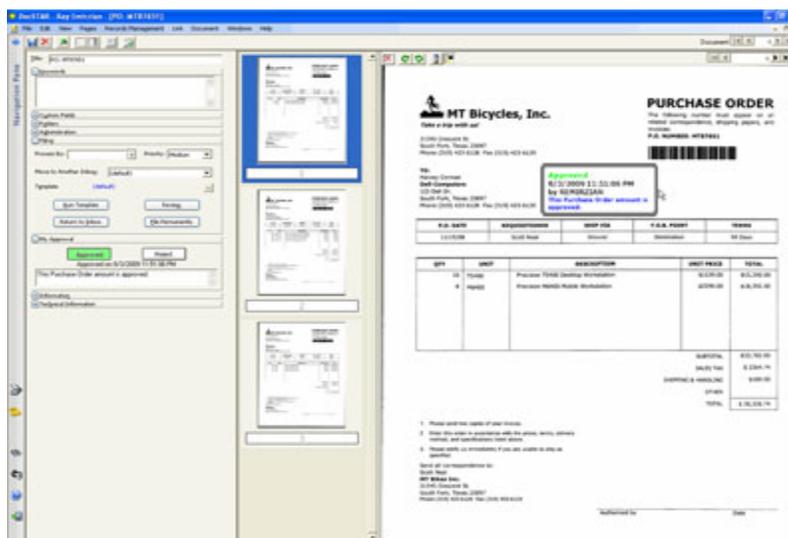
Larry Marino is the account representative.

PiF Technologies is the company that sells DocStar.

- Fash Farashahi, the IT Director for the town of Peterborough recommended DocStar. They purchased DocStar in 1999 and have been loving it ever since. Their predominate users are the Town Clerk, Finance, and Administration.
- DocStar is a program that is put onto the server and automatically files any document that is scanned into the program.
- Records can be filed to specific users and departments. They can be indexed by any keyword that DocStar “reads” and files after being scanned. Departments can submit templates so the program files records according to department needs. There is also a full audit trail.

Information and costs:

- DocStar is an application that improves efficiency by storing scanned documents and indexing them automatically via keywords in department specific templates
- Saving on DocStar is a legal original, you can shred the paper copy according to Larry Marino
- DocStar can contain any file type: audio, video, microfilm, microfiche
- Concurrent licenses allow anyone have DocStar open, but only 5 at one time can search
- Upgrades, full support, and back-ups to 2 data centers nightly are free for 1 full year
- Back-ups become \$750 after year one, upgrades and support become 18% of total price after one year (\$3,960 annual recurring cost)
- Estimated to take one week to implement on our servers and train the staff
- Would cost an estimated \$20-22,000 to get Stratham up and running



Dupont Storage Systems is based out of Berlin, Connecticut.

Ron Keith is the account representative.

- Auburn Town Administrator, Bill Herman, recommended using Dupont Storage Systems as an alternative to electronic records storage.
- Dupont Storage Systems specializes in different types of shelving to store records.
- Ron drove up and measured the Maintenance area and the Municipal Center inner basement to get an accurate measurement in order to offer Stratham shelving that maximizes space.
- Please note below that when I discuss bankers' boxes I am referencing the smaller square bankers' boxes and not the large rectangle ones that are double the size. The smaller ones allow the maximization of space according to Ron's measurements.

Maintenance Area File Room

- Left wall (3) A units @ 42"L x 15"D x 76"H (6 openings) 21 boxes/unit
- Right wall (3) A units @ 42"L x 15"D x 76"H (6 openings) 21 boxes/unit
- Center aisle (6) B units @ 30"L x 30"D x 76"H (6 openings) 28 boxes/unit
- Project Price: \$4,325.00 - to buy shelving

Under this plan, 3 shelving units would be placed on the left and right walls to store 126 bankers' boxes. A different shelving unit would be placed in the middle to store 168 bankers' boxes. This organization would require maintenance to move their office to the Highway Department (which has been confirmed as doable), but would create two aisles with plenty of space to access records. Up to 294 bankers' boxes could be stored in the Maintenance area under this plan.

Municipal Center Inner Basement

- Left Wall (5) units @ 42"L x 15"D x 76"H (6 openings) 21 boxes/unit
- Right Wall (5) units @ 42"L x 15"D x 76"H (6 openings) 21 boxes/unit
- Center aisle (10) units @ 42"L x 30"D x 76"H (6 openings) 42 boxes/unit
- Project Price: \$7,275.00 - to buy shelving
- Option for Center isle units only
- Project Price: \$4,645.00 - to buy shelving

Under this plan, 5 shelving units would be placed on the left and right walls to store 210 bankers' boxes (once wooden shelves are removed). An optional center aisle can be included or used without the left and right units to store 420 bankers' boxes. If the town spent \$7,275 for new shelving in the inner basement, it could store up to 630 bankers' boxes, which could probably satisfy every departments' storage needs for quite a while.

- These prices above include equipment and freight. (Customer to receive and install)
- Installation technical support available via phone

RICOH USA is based out of Manchester, New Hampshire.

Kyle Blossom and Christina Larochelle are the account representatives.

- Ricoh has been providing fast, secure, local scanning of virtually any type or size of documents for more than 25 years.
- On-Site and Off-Site Conversion Services:
 - Through our national network of processing centers, we have the capacity to scan more than 50 million pages per month. This reinforces our proven track record as the nation's largest provider of document imaging services. In situations where documents cannot leave the premises, Ricoh offers contracted managed services, or can deploy its mobile imaging team that can go where the documents are and quickly set up temporary on-site imaging operations.
- Preparation:
 - Light Prep 0.025 per image
 - Heavy Prep 0.040 per image
 - Make Ready (Glass) 0.200 per image
- Image Capture:
 - Scanning (8x11 and 8x14) 0.070 per image
 - Oversize B&W sq foot
 - Oversize Color sq foot
 - 11x 17 B&W per image
 - 11 x 17 Color per image
- Quality Control:
 - Standard QC 0.02 per image
 - Sample QC 0.025 per image
 - Page to Page QC 0.04 per image
- Coding:
 - Manual Off Shore Coding \$.035 - \$055 Per document
 - Manual Off Shore Coding \$0.08 - \$0.17 Per document
- Miscellaneous Services:
 - Pick Up and Delivery TBD
 - Consultation No Charge
 - Project Management \$75.00 - \$225 Per Hour

- Finance Department Estimate: \$10,906
- Town Clerk Estimate: \$19,730
- Planning Department Estimate: \$38,707
- Assessing Department Estimate: \$4,822

- Total: \$74,165 as of November 2014
 - This includes scanning and indexing for the records in the aforementioned 4 departments

Treeno Software – Conway Office Solutions is based in Nashua, New Hampshire.

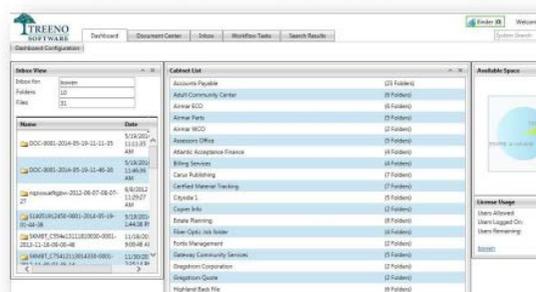
Jerry Creteau and Jim Bowen are the account representatives.

Conway Office Solutions is the company that sells Treeno Software.

- Treeno Software was recommended by Annie Dove, the Director for IT for Dover and Gil Emery of the Portsmouth Police Department.
- Treeno Enterprise Document Management is an easy-to-use yet highly robust browser based system for accessing, managing, and sharing critical documents and images across a broad range of organizational functions, departments, and locations.

Overview

- Flexible Document Storage Design
- Multiple Simultaneous Users
- Unlimited Document Storage
- Unlimited Filing Cabinets
- Multiple Departments/Databases



Treeno Dashboard

- Treeno Software works by scanning a file into the program. You can store any file format.
- Treeno is the integrated viewer, so opening files does not open another window.
- It has unlimited storage capacity and the online cabinets that files are stored under can be created for different users and departments.
- Treeno allows users to mark-up documents within its virtual viewer so one does not need to edit the original and rescan it.
- Indexing can be defined by user or department and a detailed audit trail will show the complete history of any user logged in.
- Treeno offers two solutions: an On-Premise Deployment and a Treeno Hosted Solution

Treeno Software installed on Stratham's Servers:

- Treeno Document Server with 4 concurrent user licenses: \$4,995
- System installation and implementation: \$2,000
- 6 hours of training users: \$900
- Service and Maintenance including support and updates: \$1,200 annually
- Total: \$9,095 - to buy the software for Stratham's servers

Treeno Software hosted by the Cloud:

- Treeno Cloud with 5 concurrent user licenses: \$2,388 annually
- System installation and implementation: \$1,400
- 6 hours of training users: \$900
- Service and Maintenance including support and updates: Included
- Total: \$4,699 - to host the software on Conway Office Solution's servers

Inception Technologies based out of Manchester, New Hampshire

Raymond Feoli is the account representative.

- Amherst and Derry have all used Inception Technologies as a document solution.
- Inception Technologies focuses on scanning and indexing documents into searchable PDF files.
- They are specifically an off-site company.
- Inception Technologies requires that clients prepare their boxes to be shipped (they will ship for \$50) and develop an indexing scheme to be applied to each document type.
- Inception Technologies personnel will review each image captured to verify its quality and data integrity.
- The paper documents will be scanned at 200 dots per inch (dpi).

Town Paper Records

| Estimated Number of Pages | Document Preparation | Cost of Scanning | Indexing of Files | Estimated Total Cost |
|---------------------------|----------------------|------------------|-------------------|----------------------|
| 557,000 | \$7890 | \$10,026 | TBD | \$17,916 |

- Estimate is based on 50 Four Drawer Filing Cabinets and 35 banker boxes.
- Estimated 464 man hours of document prep work
- Hourly document prep rate of \$17 per hour
- Indexing will include Year and Group
- Scanning cost is based on \$0.018 per page.
- Indexing is based on \$0.01 keystroke.
- Pick up & Delivery is \$ 50.00/trip.
- Any additional project requirements identified may increase or decrease pricing based on the customer's changes.
- Final price is subject to change based on evaluation of sample documents and acceptance of the project
- This is an estimate only final count will prevail.

This was based on Ray Feoli's estimate of records at the Municipal Center

- Additional Pricing:
 - Microfilm Scanning at 200 dpi - \$.03 per frame
 - Wide format drawings at 200 dpi - \$1.50 per drawing
 - Bound book scanning at 200 dpi - \$.12 per page

- Ray would like Stratham to gather up the records they want scanned and develop an indexing scheme that Inception Technologies can then implement when searching for the records in electronic PDF form.
- After Inception Technologies is done with one pickup, they drop the storage boxes back off and inquire about picking up and repeating the process for more records. .
- Inception Technologies specifically focuses on getting companies organized by scanning all their records, but then giving the bankers' boxes back. That way the records are online and the boxes can be stored and never looked at again.

Recommendations

Now that you have a grasp on the needs and possible plans for each department and storage space, it is important to analyze what the vendors have to offer.

- Six vendors came in to discuss what their companies had to offer Stratham in regards to a strategy to help organize Stratham's current records system.
- King Information Systems wants to consult for 10 days and come up with a strategic plan for each individual department. They come highly recommended and offer many services in regards to scanning and developing storage systems.
- DocStar is a program that can be put on Stratham's servers. Whenever a document is scanned into the system, DocStar analyzes every word, indexing them all to make all documents easy to search for. The strategy can be up and running within 1 week.
- Dupont Storage Systems would be used if we wanted to convert the Maintenance area or the Municipal Center basement into a more permanent storage solution. They will send us high quality shelving that is easy to set-up and will have a lifetime guarantee.
- Ricoh still needs to send me its estimates, but they are a billion dollar company with access to many scanning solutions and products. They estimated that it would take \$200,000 to scan every single record (paper, audio, film) that Stratham has ever had in its possession.
- Treeno Software is a program like DocStar that can be put on Stratham's servers. A document is scanned into the program and department specific indexing allows online filing organization. The town could turn a part of the software into a publically assessable database to search scanned items that are specifically unblocked to the public.
- Inception Technologies is an off-site scanning company. They can pick-up bankers' boxes from Stratham and bring them to their Manchester office to scan and index all records they pick-up. If Stratham wanted to do bulk scanning and indexing then Inception Technologies is the company to use.
- With all that summarized, I think that DocStar would be the most logical choice, if a vendor was to be chosen. Stratham is not Dover nor is it Nashua, meaning that it does not have a huge tax base and a lot of public funds. DocStar could get Stratham up and running within a week for around \$20,000. It is very user friendly and the company specifically only offers that software, they do nothing else so they would be very focused on all of Stratham's needs. Larry Marino would work with employees to establish user logins and department specific indexing schemes.
- In the beginning I was going to recommend using Dupont Storage Systems and DocStar. DocStar will allow for the electronic copy of anything scanned to count as a second legally retainable copy for the judicial system in New Hampshire. But, Stratham would still have to hold on to permanent records. Now that the Highway Department has all that shelving space in the mezzanine and there are the now empty wooden shelves in the Municipal Center basement, I wouldn't order more shelving at this time.
- Instead of saying that Parks and Recreation and the Library are the lowest priority for a scanning company to come in, with DocStar it will not matter. Once the program is paid for, every

department can use DocStar to scan any records they want into the program and electronic filing system.

- Departments can scan items just for the reason alone of being able to pack up the original paper document and store it in the mezzanine and out of the limited department space.
- Larry Marino, the PiF Technologies representative, was a very knowledgeable and friendly vendor. He was able to present DocStar to me in under 30 minutes, unlike some of the two hour presentations, which left me with very little information until I received their proposals. I think Stratham would be a great customer as a smaller town looking to slowly proceed into document management conversion.
- Both the town of Peterborough and the Epping Police Department have recommended DocStar as being easy to implement and worth the investment years later.
- Versus spending \$200,000 to scan everything, having a truck bring Stratham's records off-site, or using a company that will scan per department, DocStar will allow uniform access to the amount of licenses it buys. Stratham could even buy 1 license per section of the building.
 - For example, all of the Land Use Departments get 1 license. That way everyone can still scan into the system, but they just need to share the computer with DocStar on it to look at a past document, if they need to edit something or quickly print out another copy of the scanned file for the public.
- I would also recommend that any binders that are not frequently used be boxed up and sent to the mezzanine. The Planning Department and the Town Clerk have years' worth of Board minutes, tax records, etc. If DocStar was bought, someone could scan the minutes and then box them up. Even if DocStar is not used, if the minutes aren't gone back to frequently, then they should be stored in the mezzanine versus taking up previous bankers' box storage in the maintenance area and the vault.

RSA 33-A Disposition of Municipal Records

TITLE III TOWNS, CITIES, VILLAGE DISTRICTS, AND UNINCORPORATED PLACES

CHAPTER 33-A DISPOSITION OF MUNICIPAL RECORDS

Section 33-A:3-a

33-A:3-a Disposition and Retention Schedule. – The municipal records identified below shall be retained, at a minimum, as follows:

- I. Abatements: 5 years.
- II. Accounts receivable: until audited plus one year.
- III. Aerial photographs: permanently.
- IV. Airport inspections-annual: 3 years.
- V. Airport inspections-daily, including fuel storage and vehicles: 6 months.
- VI. Annual audit report: 10 years.
- VII. Annual reports, town warrants, meeting and deliberative session minutes in towns that have adopted official ballot voting: permanently.
- VIII. Archives: permanently.
- IX. Articles of agreement or incorporation: permanently.
- X. Bank deposit slips and statements: 6 years.
- XI. Blueprints-architectural: life of building.
- XII. Bonds and continuation certificates: expiration of bond plus 2 years.
- XIII. Budget committee-drafts: until superseded.
- XIV. Budgets: permanently.
- XV. Building permits-applications and approvals: permanently.
- XVI. Building permits-lapsed: permanently.
- XVII. Building permits-withdrawn, or denied: one year.
- XVIII. Capital projects and fixed assets that require accountability after completion: life of project or purchase.
- XIX. Cash receipt and disbursement book: 6 years after last entry, or until audited.
- XX. Checks: 6 years.
- XXI. Code enforcement specifications: permanently.
- XXII. Complaint log: expiration of appeal period.
- XXIII. Contracts-completed awards, including request for purchase, bids, and awards: life of project or purchase.
- XXIV. Contracts-unsuccessful bids: completion of project plus one year.
- XXV. Correspondence by and to municipality-administrative records: minimum of one year.
- XXVI. Correspondence by and to municipality-policy and program records: follow retention requirement for the record to which it refers.

XXVII. Correspondence by and to municipality-transitory: retain as needed for reference.

XXVIII. Current use applications and maps: until removed from current use plus 3 years.

XXIX. Current use release: permanently.

XXX. Deed grantee/grantor listing from registry, or copies of deeds: discard after being updated and replaced with a new document.

XXXI. Deferred compensation plans: 7 years.

XXXII. Underground facility damage prevention forms: 4 years.

XXXIII. Dredge and fill permits: 4 years.

XXXIV. Driveway permits and plans: permanently.

XXXV. Easements awarded to municipality: permanently.

XXXVI. Elections-federal elections: ballots and absentee ballot applications, affidavit envelopes, and lists: by the town clerk until the contest is settled and all appeals have expired or at least 22 months after the election, whichever is longer.

XXXVII. Elections-not federal: ballots and absentee ballot applications, affidavit envelopes, and lists: by the town clerk until the contest is settled and all appeals have expired or at least 60 days after the election, whichever is longer.

[Paragraph XXXVIII effective until September 30, 2014; see also paragraph XXXVIII set out below.]

XXXVIII. Elections-challenge affidavits by the town clerk:

(a) Federal elections: until the contest is settled and all appeals have expired or 22 months after the election, whichever is longer.

(b) Non-federal elections: until the contest is settled and all appeals have expired or 60 days after the election, whichever is longer.

[Paragraph XXXVIII effective September 30, 2014; see also paragraph XXXVIII set out above.]

XXXVIII. Elections-challenge affidavits by the town clerk: until the contest is settled and all appeals have expired or 22 months after the election, whichever is longer.

XXXIX. Elections-ward maps: until revised plus 1 year.

XL. Emergency medical services run reports: 10 years.

XLI. Equipment maintenance: life of equipment.

XLII. Excavation tax warrant and book or list: permanently.

XLIII. Federal form 1099s and W-2s: 7 years.

XLIV. Federal form 941: 7 years.

XLV. Federal form W-1: 4 years.

XLVI. Fire calls/incident reports: 10 years.

XLVII. Grants, supporting documentation: follow grantor's requirements.

XLVIII. Grievances: expiration of appeal period.

XLIX. Health-complaints: expiration of appeal period.

L. Health-inspections: 3 years.

LI. Health-service agreements with state agencies: term plus 7 years.

LII. Health and human services case records including welfare applications: active plus 7

years.

LIII. Inspections-bridges and dams: permanently.

LIV. Insurance policies: permanently.

LV. Intent to cut trees or bushes: 3 years.

LVI. Intergovernmental agreements: end of agreement plus 3 years.

LVII. Investigations-fire: permanently.

LVIII. Invoice, assessors: permanently.

LIX. Invoices and bills: until audited plus one year.

LX. Job applications-successful: retirement or termination plus 50 years.

LXI. Job applications-unsuccessful: current year plus 3 years.

LXII. Labor-public employees labor relations board actions and decisions: permanently.

LXIII. Labor union negotiations: permanently or until contract is replaced with a new contract.

LXIV. Ledger and journal entry records: until audited plus one year.

LXV. Legal actions against the municipality: permanently.

LXVI. Library:

(a) Registration cards: current year plus one year.

(b) User records: not retained; confidential pursuant to RSA 201-D:11.

LXVII. Licenses-all other except dog, marriage, health, and vital records: duration plus 1 year.

LXVIII. Licenses-dog: current year plus one year.

LXIX. Licenses-dog, rabies certificates: disposal once recorded.

LXX. Licenses-health: current year plus 6 years.

LXXI. Liens-federal liens upon personal property, other than IRS liens: permanently.

LXXII. Liens-hospital liens: 6 years.

LXXIII. Liens-IRS liens: one year after discharge.

LXXIV. Liens-tax liens, state liens for support of children: until court order is lifted plus one year.

LXXV. Liens-tax liens, state meals and rooms tax: until release plus one year.

LXXVI. Liens-tax sale and record of lien: permanently.

LXXVII. Liens-tax sales/liens redeemed report: permanently.

LXXVIII. Liens-Uniform Commercial Code leases: lease term plus 4 years; purge all July 1, 2007.

LXXIX. Liens-Uniform Commercial Code security agreements: 6 years; purge all July 1, 2007.

LXXX. Meeting minutes, tape recordings: keep until written record is approved at meeting. As soon as minutes are approved, either reuse the tape or dispose of the tape.

LXXXI. Minutes of boards and committees: permanently.

LXXXII. Minutes of town meeting/council: permanently.

LXXXIII. Minutes, selectmen's: permanently.

LXXXIV. Motor vehicle-application for title: until audited plus one year.

LXXXV. Motor vehicle-titles and voided titles: sent to state division of motor vehicles.

LXXXVI. Motor vehicle permits-void and unused: until audited plus one year.

LXXXVII. Motor vehicle permits and registrations-used: current year plus 3 years.

LXXXVIII. Municipal agent daily log: until audited plus one year.

LXXXIX. Notes, bonds, and municipal bond coupons-cancelled: until paid and audited plus

one year.

XC. Notes, bonds, and municipal bond coupon register: permanently.

XCI. Oaths of office: term of office plus 3 years.

XCII. Ordinances: permanently.

XCIII. Payrolls: until audited plus one year.

XCIV. Perambulations of town lines-copy kept by town and copy sent to secretary of state: permanently.

XCV. Permits or licenses, pole: permanently.

XCVI. Personnel files: retirement or termination plus 50 years.

XCVII. Police, accident files-fatalities: 10 years.

XCVIII. Police, accident files-hit and run: statute of limitations plus 5 years.

XCIX. Police, accident files-injury: 6 years.

C. Police, accident files-involving arrests: 6 years.

CI. Police, accident files-involving municipality: 6 years.

CII. Police, accident files-property damage: 6 years.

CIII. Police, arrest reports: permanently.

CIV. Police, calls for service/general service reports: 5 years.

CV. Police, criminal-closed cases: statute of limitations plus 5 years.

CVI. Police, criminal-open cases: statute of limitations plus 5 years.

CVII. Police, motor vehicle violation paperwork: 3 years.

CVIII. Police, non-criminal-internal affairs investigations: as required by attorney general and union contract and town personnel rules.

CIX. Police, non-criminal-all other files: closure plus 3 years.

CX. Police, pistol permit applications: expiration of permit plus one year.

CXI. Property inventory: 5 years.

CXII. Property record card: current and last prior reassessing cycle.

CXIII. Property record map, assessors: until superseded.

CXIV. Property tax exemption applications: transfer of property plus one year.

CXV. Records management forms for transfer of records to storage: permanently.

CXVI. Road and bridge construction and reconstruction, including highway complaint slips: 6 years.

CXVII. Road layouts and discontinuances: permanently.

CXVIII. Scenic roads: permanently.

CXIX. School records: retained as provided under RSA 189:29-a.

CXX. Septic plan approvals and plans: until replaced or removed.

CXXI. Sewer system filtration study: permanently.

CXXII. Sign inventory: 7 years.

CXXIII. Site plan review: life of improvement plus 3 years.

CXXIV. Site plan review-lapsed: until notified that planning board action and appeal time has expired plus one year.

CXXV. Site plan review-withdrawn or not approved: appeal period plus one year.

CXXVI. Special assessment (betterment of property): 20 years.

CXXVII. Street acceptances: permanently.

CXXVIII. Street signs, street lights and traffic lights-maintenance records: 10 years.

CXXIX. Subdivision applications-lapsed: until notified that planning board action and appeal period has expired plus one year.

CXXX. Subdivision applications-successful and final plan: permanently.

CXXXI. Subdivision applications-withdrawn, or not approved: expiration of appeal period plus one year.

CXXXII. Subdivision applications-working drafts prior to approval: expiration of appeal period.

CXXXIII. Summary inventory of valuation of property: one year.

CXXXIV. Tax maps: permanently.

CXXXV. Tax receipts paid, including taxes on land use change, property, resident, sewer, special assessment, and yield tax on timber: 6 years.

CXXXVI. Tax-deeded property file (including registered or certified receipts for notifying owners and mortgagees of intent to deed property): permanently.

CXXXVII. Time cards: 4 years.

CXXXVIII. Trust fund minutes, quarterly reports, and bank statements: permanently.

CXXXIX. Vehicle maintenance records: life of vehicle plus 2 years.

CXL. Voter checklist-marked copy kept by town pursuant to RSA 659:102: 7 years.

CXLI. Voter registration:

(a) Forms, including absentee voter registration forms: until voter is removed from checklist plus 7 years.

(b) Same day, returned to undeclared status, form and report from statewide centralized voter registration database: 7 years.

(c)(1) Party change form: until voter is removed from checklist plus 7 years.

(2) List of undeclared voters from the statewide centralized voter registration database: 7 years.

(d) Forms, rejected, including absentee voter registration forms, and denial notifications: 7 years.

(e) Qualified voter affidavit: until voter is removed from checklist plus 7 years.

(f) Domicile affidavit: until voter is removed from checklist plus 7 years.

(g) Overseas absentee registration affidavit: until voter is removed from checklist plus 7 years.

(h) Absentee ballot voter application form in the federal post card application format, for voters not previously on the checklist: until voter is removed from checklist plus 7 years.

(i) Absentee ballot affidavit envelope for federal post card applicants not previously on the checklist: until voter is removed from checklist plus 7 years.

(j) Notice of removal, 30-day notice: until voter is removed from checklist plus 7 years.

(k) Report of death: until voter is removed from checklist plus 7 years.

(l) Report of transfer: until voter is removed from checklist plus 7 years.

(m) Undeliverable mail or change of address notice from the United States Postal Service: until voter is removed from checklist plus 7 years.

CXLII. Vouchers and treasurers receipts: until audited plus one year.

CXLIII. Warrants-land use change, and book or list: permanently.

CXLIV. Warrants-property tax, and lists: permanently.

CXLV. Warrants-resident tax, and book or list: permanently.

CXLVI. Warrants-town meeting: permanently.

CXLVII. Warrants-treasurer: until audited plus one year.

CXLVIII. Warrants-utility and betterment tax: permanently.

CXLIX. Warrants-yield tax, and book or list: permanently.

CL. Welfare department vouchers: 4 years.

CLI. Work program files: current year plus 6 years.

CLII. Writs: expiration of appeal period plus one year.

CLIII. Zoning board of adjustment applications, decisions, and permits-unsuccessful:
expiration of appeal period.

CLIV. Intent to excavate: completion of reclamation plus 3 years.

CLV. Election return forms, all elections: permanently.

[Paragraph CLVI effective September 1, 2015.]

CLVI. Affidavits of religious exemption: until voter is removed from checklist plus 7 years.

Source. 2005, 187:3, eff. Aug. 29, 2005. 2006, 119:2-5, eff. May 12, 2006. 2010, 172:1-3, eff. Aug. 16, 2010; 191:1, eff. Aug. 20, 2010. 2012, 113:1, eff. May 31, 2012; 284:13, eff. Sept. 1, 2015. 2014, 319:1, eff. Sept. 30, 2014.