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Heather Stewart  
Senior Management Analyst  
City of San Mateo Community Development Department

#### INDUSTRY

- Local Government | Community Development Department

#### LOCATION

- San Mateo, California | San Francisco Bay Area

#### CHALLENGES

- Deteriorating microfiche records
- 500+ boxes of paper records in storage, hard to access
- Dual process of digitization and transitioning EDMS

#### BMI SOLUTIONS

- Scan microfiche first and provide in-project Digital Reel access
- Monthly pickup and scanning of Application files to allow the City time to prepare records
- In-house Laserfiche expert assisted the transition from SIRE

#### OUTCOMES ACHIEVED

- Rapid conversion of microfiche to digital with no impact on request fulfillment
- Smooth transition from existing digital EDMS (SIRE) to Laserfiche
- Hard copy records scanned and retired, staff utilizing digital records going forward

## Case Study



### Overview

The City of San Mateo Community Development Department (CDD) provides services related to land use and building construction, including building permits and inspections, planning permits, code enforcement, and neighborhood improvement and housing.

For over 15 years, the City has worked with BMI to scan hard copy plans to a digital format on a recurring basis. The scanning stayed consistent though improvements were made over time to create a more effective process. In the past few years, the City switched to BMI's OLIS indexing system to mitigate the possibilities of incorrect or non-existent indexing data tied to the scanned images.

In the City's offices, cabinets full of 16mm and 35mm microfiche constantly reminded staff that they needed to move toward digitization as the quality of the images and the tools to view the records were both degrading. After years of using the hard copy microfiche on a daily basis, the CDD decided it was time to get the microfiche scanned.

Along with the microfiche, the decision was made to include scanning over 500 boxes of Application records as well as re-evaluate the ongoing scanning of plans while also adding in permits, previously scanned in-house.

### **An All-Inclusive RFP**

For years the City had thought of moving to a new EDMS (electronic document management system), as their previous system could not meet the needs of the City. The City Clerk's office released an RFP to determine which new EDMS would be utilized. Coincidentally, CDD had also moved ahead with the creation of an RFP for the digitization of the microfiche and hard copy records. The alignment hadn't been planned as such, but it was seen as a project benefit for both efforts.

Heather Stewart, the CDD's Senior Management Analyst, states that "we had to retain various documents. Most were in storage, but they were degrading and not very accessible. Finally, we had the time and funds to do this project, so we created the RFP to make the decision on who we'd work with." In a nutshell, the goal of the project was to simplify access to the records and to retain documents based on a required schedule.

The City demonstrated prescience, as they had implemented a technology fee a couple of years before the project took place, knowing that they could use funds they generated to put towards the digitization project. In effect, San Mateo citizens that utilized the CDD services were helping to create funds for a project that would improve their own experience.

Though the City had been working with BMI for years, the scope of the project demanded that it go through an RFP process. The overall project, though delivered as a single RFP, was really comprised of three sub-projects:

- 1/ scanning approximately 125,000 microfiche sheets
- 2/ converting ~500 boxes of Application records
- 3/ scanning plans and permits on a continual basis

By addressing all aspects of their scanning requirements within one RFP, the City was able to move forward with a multi-pronged digitization plan that helped them quickly and effectively move from analog to digital access.

After RFP response submissions and a rigorous selection process, the City awarded BMI the contract for the project. Heather states: "I was on the selection committee. We chose BMI for two reasons: first, familiarity. They had to go through the same process as everyone else, but we knew they did good work and that we could trust them. Second, they provided a solution to our request at a viable cost. That's always important, and just because BMI was already working with us they didn't try to use that to our advantage. They put together a response as if this was a new client asking."

She continues, "And another thing that really stuck out to us. Out of the seven companies that responded to the RFP, Jim (Jim Detrick from BMI) was the only one that asked us to come and look at the materials. He wanted to confirm what we were asking for, check quantity estimates, and just get a better picture as a whole. He was very thorough."

### **Unforeseen Challenges**

When the project was awarded to BMI, something happened that no one could foresee: Covid-19 lockdowns.

Just when the project was supposed to get started, both the City and BMI had to put a hold on the project to comply with local and state guidance on Covid. For about six months the project was at a standstill, but it eventually got some movement and was able to start.

Another challenge was the EDMS issue: the City was running the separate RFP to replace their existing system, SIRE, with a new system. This was generally happening at the same time as the digitization project RFP. This process complicated matters because, as Heather states, “it was hard to make a decision to just get the scanning project started and go to SIRE - and make a transition to the new system later - or wait until the new EDMS was in place.”

At the time, the decision was made to scan to SIRE and convert the records to the new format later. Since the project was stalled for about six months due to Covid, the new EDMS was chosen during that time and actually allowed the City to pivot and have BMI convert to the new format, Laserfiche. Heather mentions that “Jim was critical in helping us move through the SIRE to Laserfiche conversion. He was in touch with the IT team and our Laserfiche vendor, and helped us adjudicate our master lookup file for the indexing portion of the project.”

### **Microfiche: Priority 1**

It was clear that the microfiche scanning project was the priority for the City. With ~125,000 microfiche sheets in their collection, this represented over 4,000,000 images with data relating to plans and permits.

Accessing microfiche on hardware is slow, cumbersome, and just not a good time. The City wanted to get these scanned and accessible for their staff as soon as they could. Also, the microfiche were old and starting to deteriorate. This made scanning the fiche not just important, but also urgent.

### **Digital Reel As Interim Hosting Solution**

During the project, the City was provided with BMI’s Digital Reel software application to augment their transition to

Laserfiche. Before starting, there was a concern that City staff would either have to scan in small batches or send out larger batches of microfiche and risk not having access to them to fulfill requests.

Digital Reel solved this issue: BMI was able to pick up the entire 125,000 microfiche collection at one time and bring it to their Sunnyvale headquarters. As microfiche were scanned and converted, they were loaded to the Digital Reel site for City staff to review and perform QA checks, as well as access the records to complete requests from city patrons.

As Heather states, “Having all of the fiche at BMI getting scanned while being able to access them throughout the entire timeline was excellent. We didn’t have to worry about holding onto the records and continuing to use the hard copies, while at the same time didn’t have to worry about getting to the records we needed. If we had a request, BMI prioritized the scanning and processing of those specific fiche and then put them in Digital Reel for my team to access from the web. It was so simple and effective.”

### **Long-Term Application Scanning**

The Application portion of the scanning project, though not as urgent as the microfiche, was a major piece and included roughly 500 boxes of records.

These were to be scanned over a roughly 12-month period, with the City prepping 50 boxes per month for BMI to pick up, scan, and return. Heather and her team were responsible for preparing the 50 boxes each month and ensuring the proper files and records were included in each batch; when these were ready, BMI would pick up the batch for scanning, processing, and indexing with the eventual import to Laserfiche.

## Scanning Project Eliminates Hard Copy Retrievals

By the end of the project, BMI worked with the City to scan 125,000 microfiche sheets and over 500 boxes, containing over 4,000 Planning Application records. City staff no longer have to use the hard copy documents but can instead access them directly within their Laserfiche application.

Heather makes a final point: “Kudos to Jim. He’s been my partner in this project. He’s responsive, calm, optimistic, and customer-service oriented. I’ve enjoyed working with him and relied on his expertise. That’s helped me a lot. I’m the one who’d done 95% of all of this on the City side, so relying on Jim to talk with IT and work through the hitches has been huge. All of that I’ve appreciated, and also working with the BMI team as a whole - they were a pleasure to work with.”