



Office of the Town Clerk

Debra E. Eastman, MMC
Town Clerk

MEMORANDUM

To: Rafael G. Casals, ICMA-CM, CFM, Town Manager

From: Debra Eastman, MMC, Town Clerk

Date: February 5, 2019

Re: SML, Inc. Proposal Dated January 23, 2019.
For A Comprehensive Records Management Plan:
Consulting and Implementation Services

I recently met with Mr. Steve Lewis, President of SML, Inc., regarding his proposal dated January 23, 2019 for professional services to assist the Town with preparing a plan for the retention of records that is specific to the Town, by Department. SML, Inc. staff will also assist the Town with the timely retention and destruction of records that have met the end of their retention period.

As you are aware, under Section 257.36 of the Florida Statutes each public agency is tasked to maintain a records management program to ensure economic and efficient management of information. SML, Inc. is a Sole Source providing the most in-depth and comprehensive solutions. SML, Inc. has provided their Sole Source services to many of our surrounding municipalities, such as *Coral Gables*, *Doral*, and *Surfside* along with county governments, utilities and school districts within Florida. We are lucky to be able to engage a company with such vast knowledge and experience. The cost of the development of a records management plan includes on-site data collection with all departments which will take an estimated two to three days, data analysis, agency-wide disposition and creation and will include creation of a records management plan.

The Town of Cutler Bay has not addressed records management since incorporation, thirteen (13) years, other than scanning a few documents. We have no records management plan in place. In addition to the preparation of a plan, SML, Inc. will provide hands-on consulting services to implement the plan, identifying records, providing a record review and provide destruction. The cost for the above is \$15,000.00 inclusive, as outlined in SML, Inc.'s proposal.

SML, Inc. will also provide records management consulting services. Because of their experience and practice, the SML team will be able to implement the plan identifying records eligible for destruction. Implementation services is \$2,000.00 per eight-hour day which includes their travel expenses.

In order to play catch up and bring the Town into compliance with State Statutes, it is suggested that we dedicate the FY 2018-19 budgeted funds of \$50,000.00 to complete this project with Sole Source, SML, Inc.

