Digital Transformation for the City of Georgetown

Georgetown Utilities Records Management Project
SPEAKERS

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City of Georgetown,
Assistant City Secretary

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MCCi,
Territory Leader
BACKGROUND

- Over 900 employees
- Over 20 Departments
- Georgetown Population 67,140
- Over 62,500 Utility Customers in a 70 square-mile service area
2018 AWARDS

2018 MCCi Excellence Award

2018 NAGARA Program Excellence Award
BIG WHY:

• Merger of Georgetown Utility Systems and a nearby Special Utility District
• Gained 10,000 utility customers
• Acquired thousands of records in the merger
BIG GOALS:

• Improve efficiency and reduce costs through
  o implementation of records management techniques for the
    use, maintenance, retention, preservation, and disposal of local
    government records

• Systematic control process of records
  throughout their life cycle

• Compliance with record information
  laws and regulations
BIG RESULTS:

• Records are now searchable and retrievable corresponding to our organization needs
• Accelerated the process of fulfilling the city’s increasing number of Open Records Requests
• Produced a completed records inventory
• Ensured proper retention
• Identified records for destruction and disposition
PROJECT BREAKDOWN: PLANNING

- Budget
- Schedule
- Project Team
PROJECT BREAKDOWN: EXECUTION

Project Phases

- Inventory
- Digitization
- Destruction
106,774 paper records + 26,315 electronic records = 133,089 total records inventoried, cataloged, identified disposition in 11 months.

Project Phases:
- Inventory
- Digitization
- Destruction
Decreased scanning time by 91%

Saved $82,164.00 of project budget

Changing the standard organization-wide

Project Phases

Inventory

Digitization

Destruction
The Process

- Made document capture easier and faster with single button scanning and release options
- Seamless integration using TWAIN driver application
- Document type specific Laserfiche Quick Fields sessions were created to capture and extract metadata to auto-populate in templates
- Customized workflow ensured required metadata fields were appropriately completed
- Barcode double entry automated confirmation that reduced the overall metadata entry error to less than 2%

>300,000 pages scanned using PaperStream Capture
Example: Human Resources Implementation
DIGITIZATION

DIGITAL TRANSFORMATION
This model is a roadmap for transforming your office into a digital workplace. It provides a structured framework for content digitization, process automation, analytics, and more.

Phase 1
Digitize Documents
Create an electronic filing cabinet by converting your documents from paper to digital.
DIGITAL TRANSFORMATION

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Phase 2
Organize Documents

Digitize Documents

Easily categorize your documents and manage them in a secure, central location.
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Phase 3
Automate Processes

Improve accountability by digitizing your business processes with easy-to-use electronic forms.

Digitize Document
Organize Document
DIGITIZATION

DIGITAL TRANSFORMATION

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Phase 4

Streamline Processes

Gain more visibility into your operations and increase the efficiency of cross-functional processes.
DIGITAL TRANSFORMATION

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Phase 5
Transform Processes

Drive innovation by leveraging predictive analytics and insight to transform processes.
DIGITIZATION

Electronic Records Management
Manage the life cycle and archival of records

- DoD 5015.2 Certified Capabilities
- Disposition
- Transparent Records Management

Promote compliance with:
- Sarbanes-Oxley
- HIPAA
- CJIS
- USA PATRIOT Act
- SEC
- FINRA
- and other regulations
DIGITIZATION
Records Management Actions

Name: MCCDemo IBO Archival |CA Contracts|2011
Record folder status: Eligible for Destruction
Location: Current file area

Retention
Once a record folder is cutoff, it enters the disposition phase. Once it reaches its final disposition eligibility date, it can be accessed or destroyed.
Note: If a record in the folder has record-specific processing information it may not enter disposition at the same time as the rest of the folder.

Cutoff Eligibility Date: 1/1/2012
Transfer Location: Projected, Actual
Final Disposition Eligibility Date: 1/1/2017

Destroy
The destroy command will dispose of all records in the folder that are eligible for destruction. The record folder itself will be destroyed when all the records contained within it are destroyed. If the Retain Metadata Information option has been selected, entries containing metadata will remain in the repository.

Destroy
DIGITIZATION
Project Phases

Inventory

Digitization

Destruction

DESTRUCTION/ARCHIVE

Legal
Hold
• A systematic control process of records that works for
  o Records Administrators
  o Staff
  o Citizens of Georgetown

• Enhances the ability to provide information to those who need it, when they need it, and in the most cost-effective manner
NEXT STEPS

• Continue to automate additional processes
  o Georgetown Utility Systems, Irrigation Rebate Form process
  o Georgetown Animal Shelter, Volunteer Form process
  o Georgetown Historic Survey and Archival Form process

• Once complete, these processes will
  o facilitate increased user adoption
  o improve solutions based on user feedback

Lastly, we plan to roll out this process across the city—perhaps the world!
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CONTACTS

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Questions?

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