

City of Lemon Grove
REQUEST FOR PROPOSALS
City-Wide Records Retention Schedule

The City of Lemon Grove is requesting proposals from interested, qualified, and experienced consulting firms for reviewing and updating the City's current Records Retention Schedule.

Background

The City of Lemon Grove (City) is a General Law City, incorporated in 1977. The City operates under a Council/Manager form of government and has a five-member City Council comprised of members elected at large. Lemon Grove has a current population of approximately 26,000 and is a rural, suburban community in San Diego County area. The City is a contract city with the exception of Fire Services.

The Lemon Grove City Council last adopted a Records Retention Schedule Revision in 2019 and is currently working to update the City's Records Management Program, which will focus on digitizing records and allowing for electronic availability. The current Records Retention Schedule (Schedule) needs to be reviewed to ensure the City is meeting all current legal requirements and to evaluate current retention citations for all departments citywide.

Required Proposal Information / Scope of Work

The City is requesting proposals from qualified consultants to provide all of the services listed below. Proposals should include the associated cost for each type/phase of service.

PHASE 1: RECORDS RETENTION SCHEDULE REVIEW AND UPDATE

1. Review the City's current Schedule to ensure citations are up-to-date and in compliance, evaluate the retention periods for all departments to consider reductions or necessary revisions, and create a format for the Schedule that can easily be implemented and comprehended.
2. Meetings (either in person or video conferencing, by mutual agreement) with representatives from each department to review the current schedules and provide suggestions for additions, deletions, and modifications. Meetings would be ongoing until sufficient draft schedule update information has been compiled.
3. Meeting(s) with City Clerk representatives and City Management to discuss the final draft of the Schedule.
4. Produce a customized final retention schedule reflective of the City's organizational structure (which should include records which can be destroyed after imaging, quality assurance, and proper retention in a document imaging system).

5. Conduct any final meeting(s) necessary to fully implement final schedule.
6. Deliver or assist with draft City Council reports and associated Resolution for Retention Schedule adoption.

PHASE 2: IMPLEMENTATION OF FINAL SCHEDULE AND TRAINING

1. Assist with creating new, or reviewing and revising, any associated Policies, Procedures, and Forms for retaining and destroying records. Suggest any modifications to current Records Retention Policies to allow staff to administratively update the Schedule with minor revisions.
2. Provide citywide (at least one) training regarding use of revised retention schedule, best practices for retaining records (including electronic document and email retention), and when physical records can be destroyed. Training should be recordable.

PHASE 3: RETENTION SCHEDULE ANNUAL SERVICES

1. Provide an on-going annual service to legally review schedule and changes in retention rules.
2. Review and consider incorporating annual revisions recommended by employees.
3. Unlimited assistance (phone/email) for Q&A during the year pertaining to the Records Schedule.

Information to Include in the Proposal

1. Business Information
2. Experience / Qualifications
3. Project Approach / Methodology / Timeline
4. References
5. Pricing for each phase of the proposal
6. Statement that proposal pricing will be valid for 90 days
7. Signature on proposal

Professional Services Agreement

The chosen Consultant will be required to execute a Professional Services Agreement, similar to the attachment (which includes the City's insurance requirements). If a Consultant wishes to modify any of the terms of the agreement, please include the suggested modifications and reason(s) for the changes in the proposal.

Deadline

Please submit proposals no later than April 4, 2024 at 2:00 p.m. to the following:

Joel G. Pablo

City Clerk

City of Lemon Grove

jpablo@lemongrove.ca.gov Electronic submittals are preferred.

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