



Office of the City Manager

CONSENT CALENDAR  
September 10, 2024

To: Honorable Mayor and Members of the City Council  
From: LaTanya Bellow, Interim City Manager  
Submitted by: Mark Numainville, City Clerk  
Subject: Contract: FileTrail, Inc. for Records Management Software System

RECOMMENDATION

Adopt a Resolution authorizing the City Manager to execute a contract with FileTrail, Inc. for \$178,653.47 for software licensing, maintenance, and related services for a records management software system, for a total contract amount not to exceed \$178,653.47 and for the term from September 26, 2024 to September 26, 2029.

FISCAL IMPACTS OF RECOMMENDATION

Funding for the contract will be available in the City Clerk's Department Fiscal Year 2025 General Fund and have been allocated in budget code 011-32-313-000-0000-000-411-613130. Allocations of funds for subsequent years will be subject to adoption of the Annual Appropriations Ordinance for that fiscal year.

CURRENT SITUATION AND ITS EFFECTS

The City has over 14,000 boxes of physical records in storage and the FileTrail, Inc. box tracking system is paramount to tracking this inventory of these boxes. The City must upgrade to Version 5 of FileTrail because the current Version 4 of FileTrail is no longer supported. In addition, Version 5 has new features that allow FileTrail to integrate directly with the software at the storage facility. This integration will save staff time and result in cost efficiencies and faster retrieval of records. The additional cost for Version 5 is essential in order to maintain citywide records. The FileTrail system allows users to view contents, request, and return offsite box inventory with ease for department needs and the fulfillment of public records requests. FileTrail is also used to assign the mandated retention period for city records in accordance with the Records Retention Schedule and provides for the orderly maintenance and disposition of city records.

The contract will add funds and extend the term of the contract with FileTrail, Inc. for an additional five years. This action is presented to Council as a new contract and not a contract amendment in order to convert the legacy FileTrail contract in FUND\$ to a new contract in ERMA. This will result in contract management efficiencies by only tracking and managing the contract in one system (ERMA).

BACKGROUND

On November 26, 2013, the City issued a Request for Proposals (RFP) No. 14-10809-C for ECMS / AGENDA / RECORDS MANAGEMENT. The City received fifteen responses to the RFP and FileTrail Inc. was selected as the box tracking vendor after a comprehensive evaluation process. In July 2014, the City entered into contract No. 9691 with FileTrail, Inc. for box tracking at offsite storage. On July 9, 2019 Council authorized a contract amendment to increase the contract amount an additional \$44,163 and extend the term to June 30, 2024. The FileTrail system has increased the efficiency of administering the Records Management Program in all City departments.

ENVIRONMENTAL SUSTAINABILITY AND CLIMATE IMPACTS

Continuing the contract with FileTrail Inc. has several opportunities associated with environmental sustainability. FileTrail is a web-based digital platform that requires no printed materials. All documents uploaded to the system are stored and can be viewed digitally.

RATIONALE FOR RECOMMENDATION

Records Management Software and its annual maintenance is required to ensure a continued successful Citywide Records Management Program.

ALTERNATIVE ACTIONS CONSIDERED

As FileTrail, Inc. is the current box tracking software, and has provided excellent service at a competitive price, other alternatives were not considered.

CONTACT PERSON

Mark Numainville, City Clerk, City Clerk Department, 981-6909

Attachment:

1: Resolution

RESOLUTION NO. ##,###-N.S.

CONTRACT: FILETRAIL, INC. FOR RECORDS MANAGEMENT SOFTWARE  
SYSTEM

WHEREAS, the City Clerk Department is responsible for the Citywide Records Management program and box tracking software system; and

WHEREAS, in 2014, the City issued Request for Proposal No. 14-10809-C for a records management box tracking software system and a panel of staff selected FileTrail, Inc. based on their ability to meet the selection criteria, resulting in the execution of Contract No. 9691 with FileTrail, Inc.; and on July 9, 2019 Council authorized a contract amendment to increase the contract amount an additional \$44,163 and extend the term to June 30, 2024.; and

WHEREAS, FileTrail Inc. continues to provide the City with a high level of customer service and competitive pricing; and

WHEREAS, funds totaling \$178,653.47 for this contract have been allocated in the General Fund, budget code 011-32-313-000-0000-000-411-613130.

NOW THEREFORE, BE IT RESOLVED by the Council of the City of Berkeley that the City Manager is hereby authorized to execute a contract with FileTrail, Inc. for software licensing, maintenance, and related services for a records management software system, for a total contract amount not to exceed \$178,653.47 for the term from September 26, 2024 to September 26, 2029.

