

PANOLA COUNTY COMMISSIONERS' COURT AGENDA REQUEST

MEETING DATE REQUEST: August 4, 2020

DEPARTMENT: District Clerk

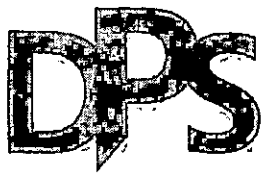
CONTACT PERSON: Lindsey Smith

REQUEST SUBJECT: Approve expenditure of funds to Data Preservations Solutions (DIR CONTRACT NUMBER 4038) for preservation of docket books, minute books, and case files.

COMMENTS: The District Clerk's office wishes to expend budgeted funds for continuation of preservation/backup project. This project will consist of three parts.

- **Part 1 - Docket Page Restoration (Divorce & Civil docket books for years 1946-1948)**
DPS will preserve the docket sheets and return pages to the District Clerk. The District Clerk's Office will file the finished pages in the case files which were preserved in earlier projects.
- **Part 2 – Book Preservation (Index to Criminal Minutes #1, Index to Civil Minutes #1 & #2, Reverse Index #1)**
Books will be restored, preserved in new binders, and scanned. All pages in these books will be placed in archival sleeves which will provide physical support, along with protection from atmospheric pollutants and daily public use. The pages will then be placed in new binders. The binder spine will be leather and the binder front and back boards will be imitation leather for durability. DPS will also provide the District Clerk's Office with a digital image of books via USB drive, as well as, back up images of books on 16mm microfilm roll.
- **Part 3 – Case File Scanning (Civil Case files starting in 1954)**
DPS will scan the cases including the sides of the folder that contain information. The case folder will be replaced and labeled. Images of the case files will be stored by folder and will be indexed for cause number, filing date, and all parties. DPS will scan up to 60,000 pages or no more than \$10,000, as long as the last case is a complete case. No partial cases.

BUDGETARY IMPACT: Project cost is \$21,210.09



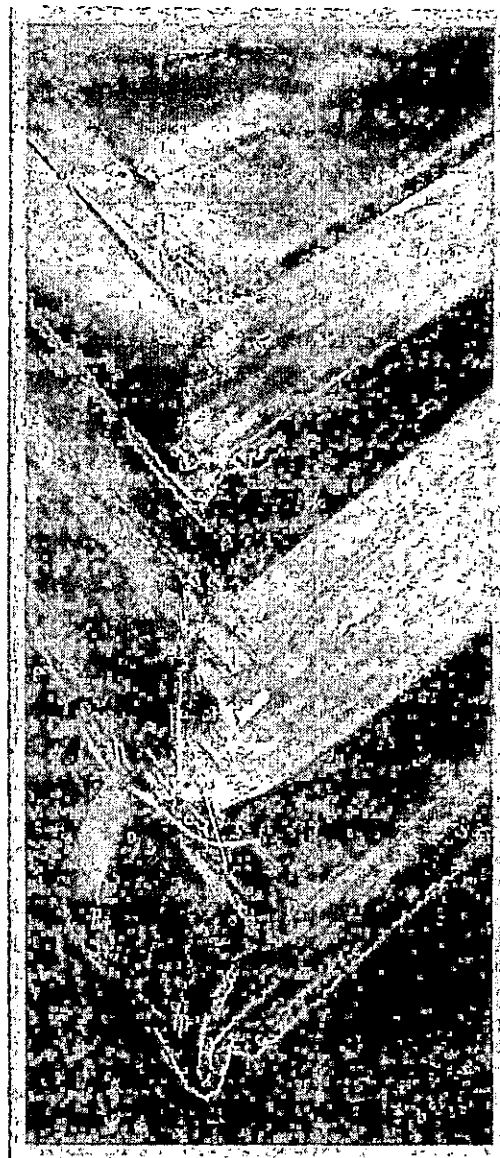
DATA PRESERVATION SOLUTIONS

Capturing History....

Defining the Future

CASE FILES, DOCKET & BOOK PROPOSAL

DIF Contract Number - 4038



PREPARED FOR:
LINDSEY SMITH
District Clerk

PANOLA COUNTY
100 S. Sycamore, Room 227
Carthage, TX 76533

PROPOSAL ISSUED:
07/27/2020

2020

www.datapreservationsolutions.com



DATA PRESERVATION SOLUTIONS

Capturing History.....

Defining the Future

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www.datapreservationsolutions.com

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ABOUT THE COMPANY

If history were taught in the form of stories, it would never be forgotten.

-- Rudyard Kipling

Data Preservation Solutions (located in Dallas, Texas) is the latest iteration of the Rathe Family legacy of document management businesses that began in Texas as Southern Microfilm Corporation. The family has been providing document imaging and government records management since the 1960s when governments across the country began using microfilm as a means to store official public records. Southern Microfilm Corporation was the initial business, manufacturing one of the first microfilm cameras for County Clerks and Recorders, and lead the way for micrographic services as Photostat and Xerox Copyflo took hold.

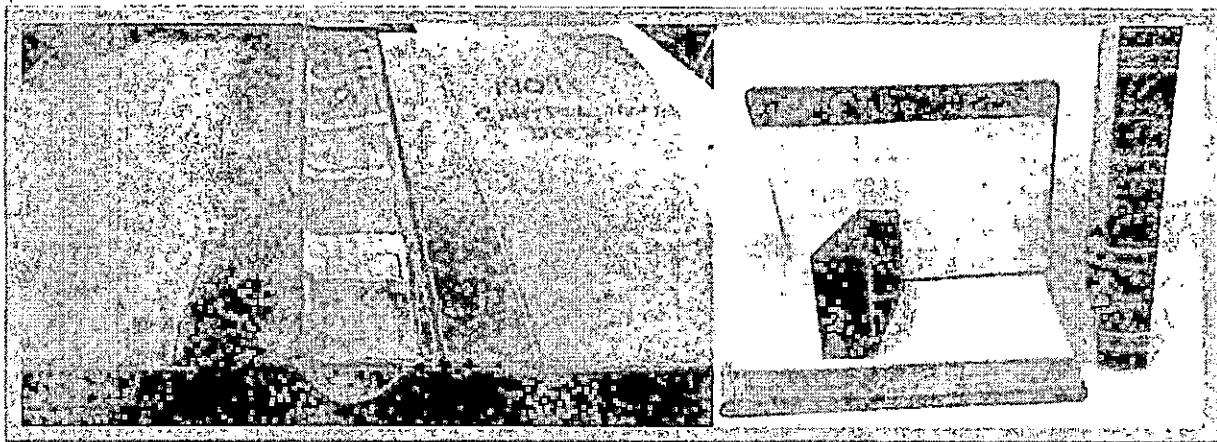
As microfilm was being edged out by digital technology, their understanding of the underlying "old school" imaging became highly coveted. Not only did they know how the equipment worked, they knew and understood the shortcomings of the storage media – from film to shucks to paper – and how to best preserve the data contained therein.

Beginning in 2000, Data Preservation Solutions and its affiliated subsidiaries began building upon their unique knowledge of micrographics and merged digital technology into its service offerings. Today, DPS has the advantage of a comprehensive understanding of historical county recording systems as well as digital based systems.

DPS has grown their service offerings to span a vast array of services and solutions focused on county government, including (but not limited to):

- Document Scanning & Indexing
- Historical Book Preservation
- Microfilm/fiche Scanning, Inspection & Washing
- Land Records Software
- Official Property Records/Vitals/Case Files Conversion
- Property Fraud Alert

Today, DPS has 2 production facilities located in Dallas and Bonham, Texas. Supported by over 40 team members with an average tenure of 21 years in the industry, DPS is dedicated to keeping their partners' operations running as smoothly and efficiently as possible.



Data Preservation Solutions and its subsidiaries have been preserving and restoring books for over 45 years. You can learn more about "The Bindery" by visiting <https://vimeo.com/234053412>

ABOUT THE TEAM

Lance Gonzales Senior Sales Consultant

Lance began his records management career in the early 1990s as a field service technician for Horizon Micrographics. He advanced from repairing microfilm and microfiche equipment to selling and installing imaging systems. As technology advanced with document scanners and document management software, Lance became one of the top technicians for Horizon and eventually was asked by Canon USA to help develop a training certification program for technicians across the country.

By the early 2000s, Lance was focused on document conversion solutions, primarily for healthcare facilities and government entities. With more than a decade's worth of experience with County Records, Lance has developed a broad understanding of Official Property Record types, methods of imaging, and data capture. He has been responsible for over 100,000,000 government records being converted from paper to digital images with associated indexes. Today, Lance leads DPS' sales efforts across North America. Clients rely on his micrographics background and historical records perspective and how it can be meshed with today's digital systems. Lance's affiliations include:

- Texas County Clerks Association
 - CDIA
 - AIC
 - ARMA
-

Roger Tinnin Senior Sales Consultant

Roger has been involved with Texas County Government Services since 1989, spanning the election aspects (when he worked for Hart InterCivic) all the way to court records. He enjoys the benefits of a diverse background from insurance to construction to customer service, allowing him to consider different points of view and to think outside the box when necessary.

No matter the industry, his priority has always been delivery of top-notch services and products. Since 2010 his primary focus has been on local government and, more specifically, the courts. His knowledge of the unique records within the County and District Clerk's offices is extremely valuable whether you're looking for sound advice to create an inventory and archiving plan or to develop a backfile conversion budget.

ABOUT THE TEAM

John Rickerby Senior Sales Consultant

In the 1990's, John marketed enterprise software for a national vendor specializing in financial, land management and property tax solutions for state and local governments, and later - public utilities, law enforcement, fire, courts and K-12. He joined Hart InterCivic in 2003 to promote elections and records management systems from Texas through the Southeastern U.S.

While at Hart he developed a strong interest in the records management portion of the business. He especially appreciated the historical records maintained by counties that are so important to commerce and citizens, and the immense need to secure and preserve these records. As Hart expanded into digitization services, data entry and preservation, John embraced this and the opportunity to work closely with customers to communicate best practices and help build cost effective plans to digitally capture and preserve these records.

John brings a broad understanding of government agency workflows and a detailed understanding of records management, digital tools and preservation. He is delighted to join the skilled and deeply experienced professionals at DPS and looks forward to working with you to make your project a resounding success and a point of pride for the community.

Chris Ruggles Software Sales Consultant

Chris joined DPS in 2015, coming from Fidar of Texas (a subsidiary of Fidar Technologies and a predecessor to what is now Data Preservation Solutions). With over 20 years of customer service and project management experience, Chris blends his unique relationship-building skills with his software expertise in his current role at DPS. His passion for working with our county partners shines through in everything he does.

Because his primary role is software, Chris has developed a vast knowledge of Texas statutes related to the County Clerk's daily functions. Not only is this applicable to land records, but he is also very familiar with Vitals and DD214's. And since all the supporting data ultimately began with paper, it's only natural that he's familiar with your shucks and volumes too.

ABOUT THE TEAM

John Simpson Master Conservator

For over 50 years, John Simpson has been perfecting techniques that have been used for centuries – hand sewn craftsmanship using traditional needles and thread – and combined this old world craftsmanship with modern-day restoration techniques.

1968 – John established his bookbinding operation in Bonham, Texas to specifically serve the Texas County book repair market. Eventually his business grew to serve over 100 counties across Texas and the United States, helping clients like Walraven Bros. Inc. and KPI Printing to private binding for ministers, doctors and lawyers.

His services/expertise include paper cleaning, de-acidification, paper repair (utilizing Filmoplast tape and mending with Japanese paper and wheat starch paste), book rebinding & new bindings (buckram, leather or canvas), and archive sleeve protection.

Memberships/Credentials: Member of AIC (American Institute for Conservation of Historic & Artistic Works); Vendor Member of Texas Association of County & District Clerks; Vendor Member of Property Records Industry Association (PRIA).

John Allen Simpson Chief Conservator & Artistic Director

John Allen exhibited an artistic flair from an early age, winning awards for his artwork and continuing his passion at East Texas State University (now Texas A & M University in Commerce, TX). After a brief stint teaching, John Allen joined his father, John E. Simpson, to showcase his artistic talents and his attention to detail in the book preservation and conservation industry.

For over 30 years, John Allen has been measuring canvas, leather and other materials for new books and books to be restored. He “rolls gold” the traditional way with a metal wheel and does ink printing the old-fashioned way (when necessary). A true artist, John etches glass as a side interest and has been commissioned to paint artwork for customers from New York to Texas.

His meticulous work and attention to detail naturally carry over to his conservator role, where his artistry will live on in restored and preserved County Records across the United States, primarily in Texas, Oklahoma and New Mexico. From the preparation of fly leaves and backbones to custom covers with rolled gold, John Allen’s work is truly exceptional.

His services/expertise include paper cleaning, de-acidification, paper repair (utilizing Filmoplast tape and mending with Japanese paper and wheat starch paste), book rebinding & new bindings (buckram, leather or canvas), rolling gold lettering & artistic designs, and archive sleeve protection.

Memberships/Credentials: Member of AIC (American Institute for Conservation of Historic & Artistic Works); Vendor Member of Texas Association of County & District Clerks; Vendor Member of Property Records Industry Association (PRIA).

ABOUT THE TEAM

Cody Godden

IT Project Manager/Operations Manager

Since 2002, Cody has been sharpening his operations, image capture and software applications skills, focusing extensively on the local government sector. Starting as a Document Imaging Analyst with DocuData Solutions, his background includes project development and management, data handling, image conversion, software and hardware installations, chain of custody documentation, document preservation, and customer support.

Cody has been responsible for hands-on scanning and restoration of hundreds of historic documents and books in addition to software implementation. He's proficient in archival repair and mending techniques and often pitches in when necessary. His expertise includes document assessment, paper cleaning, de-acidification, paper repair (utilizing Filmoplast tape and mending with Japanese paper and wheat starch paste, and archival storage options (acid-free folders/boxes/sleeves/binders).

Memberships/Credentials: Vendor Member of Texas Association of County & District Clerks; Vendor Member of Property Records Industry Association (PRIA).

Dalia Daly

Image Capture & Enhancing Manager/Preservation Manager

Dalia began her career nearly 30 years ago at Business Records Corporation providing microfilm and indexing services to county customers. Over the years, she has migrated into the digital image and indexing services department where she can utilize her records expertise to digitally restore poor quality images to legible likenesses of their originals.

Since better quality originals produce better quality digital scans, Dalia has also learned to assist with paper repair and mending, making her a valuable preservation team member. Her expertise includes document assessment, paper cleaning and document preparation (removing staples and paper clips), paper repair utilizing Filmoplast tape, tear mending using Japanese paper and wheat starch paste.

Memberships/Credentials: Vendor Member of Texas Association of County & District Clerks; Vendor Member of Property Records Industry Association (PRIA).

Our experienced team holds a collective background in records preservation of over 100 years. Their varied backgrounds are an invaluable asset and their ability to work together as a unified crew working toward a single goal is the key to their continued success.

SERVICES SUMMARY

In addition to book preservation, Data Preservation Solutions offers an array of services centered on data management and information permanence.



Book Preservation

With over 45 years of bookbinding and restoration experience, our conservators in residence complete all phases of preservation in our facilities. From book cutting and archival cleaning to mending and gold leaf letting, our final products are works of art.

County Record Scanning

Almost anyone can scan and create digital images with today's technology, but only an experienced team like DPS can ensure quality images and expert indexing so you can easily locate your images decades from now. We scan not only paper, but also microfilm/fiche. Life is messy, but that doesn't mean your records should be.

Land Record Indexing

Land Records are one of the most frequently searched records within County Government. For this reason, it's imperative that indexing is accurate so that the proper documents can be located. Data Preservation Solutions has designed CREW to streamline this process through step-by-step data indexing, verification and QC functions.

Land Records & Vitals Software

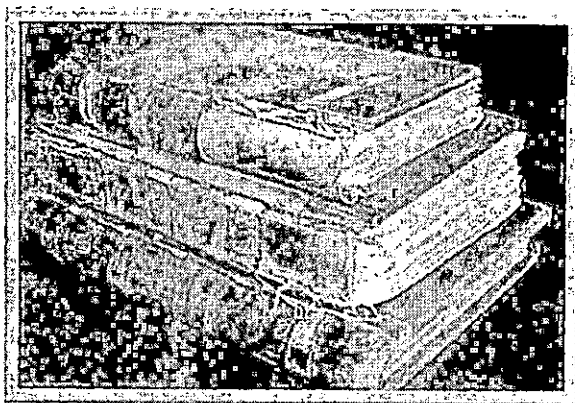
DPS provides cutting-edge software designed to help County Governments achieve their highest potential. From our intuitive AVID powered by INSPECT for land records to our Vitals Software, DPS technology products define the future of digital records.

Property Fraud Alert

Property Fraud Alert is an internet-based system that automatically alerts your constituents, via email or phone, each time there is recording activity on a property owned by them. This early alert gives the victim valuable time to stop someone attempting to commit property fraud.

PRESERVATION AND SCANNING PROCESS

DETAIL OF PRESERVATION AND SCANNING SERVICES

- A. Part 1 – Docket Page Preservation – The bindings for these books are broken and the pages are worn and in need of preservation services. No book binding is required. District Clerk staff will file the finished pages in the case files which were preserved in earlier projects.
- B. Part 2 – Book Preservation – The books to be preserved are badly worn with bindings falling apart and pages torn or separating. In this phase four books will be restored, preserved in new binders, and scanned with attention to enhancing faded pages. Film will be provided of the scanned images.
- C. Part 3 – Case File Scanning – Case files will be prepped by the District Clerk staff to remove unnecessary pages and confirm they are in order. DPS will scan the cases including those sides of the folders that contain information. The case folder will be replaced and labeled. Following scanning the folder images will be printed and all original pages will be loaded onto the clips in the new folders. The case file will be indexed.
- 
- D. Page Mending (Books & Docket Pages)
- Mending tears, cracks, and fragmented sheets with reversible and industry-accepted methods of conservation repair.
 - Repairs are accomplished by utilizing archival quality mending tissues and Filmoplast Tape. After applying a thin coat of a special paste to the damaged page, the repair tissue is applied over the tear. Weights are placed over it to be sure it dries flat. In an instance where mending tissue won't work (not all tears can be mended), archival, museum-quality Filmoplast Tape can be utilized. This high quality tape with water-based adhesives is pH-neutral, non-yellowing and will not deteriorate over time.
- E. De-acidification (Books & Docket Pages)
- After testing for compatibility, all sheets are de-acidified using a commercially prepared solution, which is approved and used by the Library of Congress. DPS recommends the Bookkeeper's De-acidification process, a widely used and accepted process. After the de-acidification process, documents are randomly tested to ensure a pH of 8.5.
- F. Conversion (Books and Case Files)
- Color and Bi-Tonal Images
 - Pages will be carefully scanned (converted to digital images) per County requirements.
 - DPS will use document capture hardware and software specifically designed to capture and process County government records images/pages.
 - DPS will scan all media at 300 dpi and provide images/pages in grayscale and color (where necessary) JPEG and bitonal .tif format.
 - JPEG images will provide an exact digital backup of the data contained within the images/pages, and .tiff images will provide superior performance in the imaging system.
 - DPS will deliver all images per the County's specifications as Group IV .tif or PDFs.

PRESERVATION AND SCANNING PROCESS

6. DPS will deliver 16mm microfilm of Book images.
 - ii. Auto-Image Clean-Up
 1. DPS will work with the County to establish agreed-upon image clean-up standards and services.
 2. DPS will provide auto-image cropping for 100% of images/pages scanned.
 3. DPS will provide auto de-skew for 100% of the images scanned.
 4. DPS will identify record images that will present special image challenges and excessive inferior quality images.
 - iii. Image Identification
 1. DPS will organize the images for each book within a folder labeled by book type and volume.
 2. Images within a volume will be identified by page.
- G. Encapsulation (Books)
- i. All sheets are encapsulated in custom sized Melinex® 516 archival polyester pockets. The inherent static cling of Melinex® 516 polyester provides physical support, along with protection from atmospheric pollutants and daily public use.
 - ii. Sleeves closed on 3 sides with the binding side remaining open for access and airflow.
- H. Binding (Books)
- i. New sleeves will be placed into 2 ¾" (internal dimension) binders.
 1. The encapsulated documents are ready for assembly into their designated replacement binder. DPS manufactures all of its binders in-house, on a per book basis, to size on 1/4" incremental capacities. All volumes are manufactured from archival materials and 316 stainless steel mechanisms.
 2. The binder cover and spine will be covered the same materials used on the Civil books processed by DPS in 2019.
 3. Each original binder may be replaced with two (2) new binders due to size and weight constraints. This is, for each book preserved, Panola County may receive two (2) new books.
 4. DPS recommends Binder Titling to be identical to existing book titling.
 5. Binder spine will be leather and binder front and back boards will be imitation leather for durability. Lettering on spine and cover will be gold. Leather and board color will be the same as that used for the Civil books in 2019.
- I. Deliverables
- i. Project duration – completion before end of County fiscal year on September 30, 2020.
 - ii. Monthly delivery of finished work.
 - iii. Delivery of digital images at end of project.
 1. Delivered via USB drives.
 - iv. Delivery of 16mm microfilm roll of Book images to County storage facility after final acceptance.

INVENTORY & BUDGET



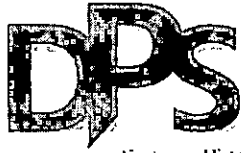
Panola District Clerk Inventory

Date: 7/27/20

Project Notes:

1. County will remove all fasteners and clips from Case Files and will present pages in the order to be scanned.
2. All sides of the Case File folder containing data will be scanned first followed by all pages in the folder. The folder scans will be printed and added to the front of the original case file pages.
3. Finished Case File pages and printed folder images will be placed in new cause number labeled folders and loaded onto the folder clip in the order received.
4. Images will be stored by folder and will be indexed for cause number, filing date and all parties (plaintiff and defendant).
5. DPS will scan Case Files up to the number of pages shown or no more than \$10,000, as long as the last case is a complete case. No partial cases.
6. For Book preservation, each original binder may be replaced with two (2) new binders due to size and weight constraints. This is, for each book preserved, Panola County may receive two (2) new books.
7. DPS recommends Binder Titling to be identical to existing book titling.
8. Binder spine will be leather and binder front and back boards will be imitation leather for durability. Lettering on spine and cover will be gold. Leather and board color will be the same as that used for the Civil books in 2019.
9. Books preserved will be scanned and the image folder will be identified by book title and the pages by volume and page. 16mm film will be made from the digital book images.
10. The pages from the Docket books will be preserved but no new binders are required. District Clerk staff intends to file the finished pages with case files which were preserved in earlier projects. Neither page encapsulation or scanning has been requested for Docket pages.
11. This project is to be completed, delivered, and invoiced prior to the end of the County fiscal year ending on September 30, 2020.

INVENTORY & BUDGET



Panola County District Clerk Inventory

Date: 7/27/20

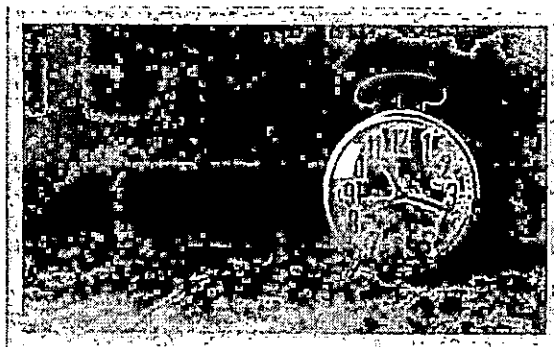
Book Type	Vol	Binding	# of	Size	Price	Total Price	Comments
							Preserve Docket book pages. No book binding.
Docket Page Preservation							
Divorce Cases Disposed of in 1946-1948	1948	Mechanical	251	8 X 14	\$ 1.29	\$ 323.79	Alpha tabs
Civil Cases Disposed of in 1946-1948	1948	Mechanical	220	8 x 14	\$ 1.29	\$ 283.80	Alpha tabs
Disposed Civil Docket	N/A	Mechanical	1,400	8 x 14	\$ 1.29	\$ 1,806.00	high count estimate
							Preserve and bind books. Scan and film.
Book Preservation							
Index to Criminal Minutes	1	Stitched	180	17.5 x 11	\$ 5.00	\$ 900.00	leather tabs - worn and missing
Reverse Index	N/A	Stitched	165	15 x 9	\$ 5.00	\$ 825.00	paper tabs - worn and missing
							blank pages = 103-156, 171-190, 241-252, 375-380, 395-420, 435-490, 497-506, 557-584, 629-664, 673-710, 729-794, 797-798. 800 is last page - worn and missing paper tabs
Index to Minutes Dist. Ct	1	Stitched	346	16.5 x 11	\$ 4.35	\$ 1,505.10	worn & missing metal tabs
Index to Minutes Dist. Ct	2	Stitched	384	18 x 12	\$ 4.60	\$ 1,766.40	
							Scan case files. Staff will prep files. Pages will be in order.
Case File Scanning & Indexing							
Case Files	Flat Files	60,000	up to 11x14	\$0.230	\$ 13,800.00	\$	Replace folder w/ new clip folder, print scanned folder pages & load all pages.

THE TIMELINE

PROJECT TIMELINE:

Overall project duration will be affected by total volumes requested for processing.

- A. **Pick-Up:** Pick-Up will be scheduled with 48 hours of notification of release of books. Pick-up will happen within 5 workdays of notification of release of books.
- B. **Receipt and Inventory:** Books and case files will be inventoried and checked-in within 4 hours of arrival at our Irving, TX production facility location.
- C. **Evaluation:** Contents will be evaluated to confirm they match SOW profile requirements.
 - i. Any items identified as "non-compliant" will be documented and the DPS Project Manager (PM) will be notified immediately.
 - ii. The DPS PM will contact the appropriate DPS project stake holders and County stake holders. Determination for "non-compliant" records will be case-by-case and not included within this standardized timeline.
- D. **Delivery:**
 - i. Finished records will be delivered in monthly batches and the project will be completed prior to the end of the County fiscal year ending September 30, 2020.
 - ii. Delivery will include finished books and cases, images on USB drive and book preservation images on 16mm microfilm.



TERMS, CONDITIONS & SIGNATURES



We, the undersigned, accept this document as a stable work product to be used in process to subsequently design and deliver a Statement of Work (SOW) for this project.

The entirety of all books created, digital images created, and indexes created during this project are the exclusive property of Panola County, Texas. DPS will not retain a copy of, sell, or give away any digital images or indexes processed for the project described in this proposal.

This agreement is not effective until executed by all parties.

For the Panola District Clerk

Authorized Signature:

Lee Ann Jones

Printed Name:

Lee Ann Jones

Company:

Panola County

Date:

8-4-20

For Data Preservation Solutions:

Authorized Signature:

Brian L. Rader

Printed Name:

Brian L. Rader

Company:

DPS

Date:

8-12-20