

# PANOLA COUNTY COMMISSIONERS' COURT AGENDA REQUEST

**MEETING DATE REQUEST:** March 16, 2021

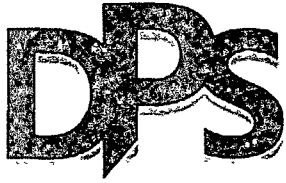
**DEPARTMENT:** District Clerk

**CONTACT PERSON:** Lindsey Smith

**REQUEST SUBJECT:** Approve expenditure of funds to DPS (Data Preservation Solutions) for preservation and archival digitization of Panola County District Clerk's civil case files.

**COMMENTS:** The District Clerk's office wishes to expend budgeted funds for continuation of preservation/backup project. This project will address civil case files starting in 1961. DPS will scan pages (including sides of folders that contain information) at 300 dpi and convert to digital images. The case folder will be replaced and labeled in heavy archival quality folder similar to those already in use by the District Clerk, and case documents will be loaded and secured inside folder with heavy folder clasp. Images of the case files will be stored by folder and will be indexed for cause number, filing date, and all parties. DPS will also provide the District Clerk's Office with an exact digital backup via USB drive. There will be no partial cases.

**BUDGETARY IMPACT:** DPS will scan up to 80,000 pages or no more than \$20,000.



**DATA PRESERVATION SOLUTIONS**

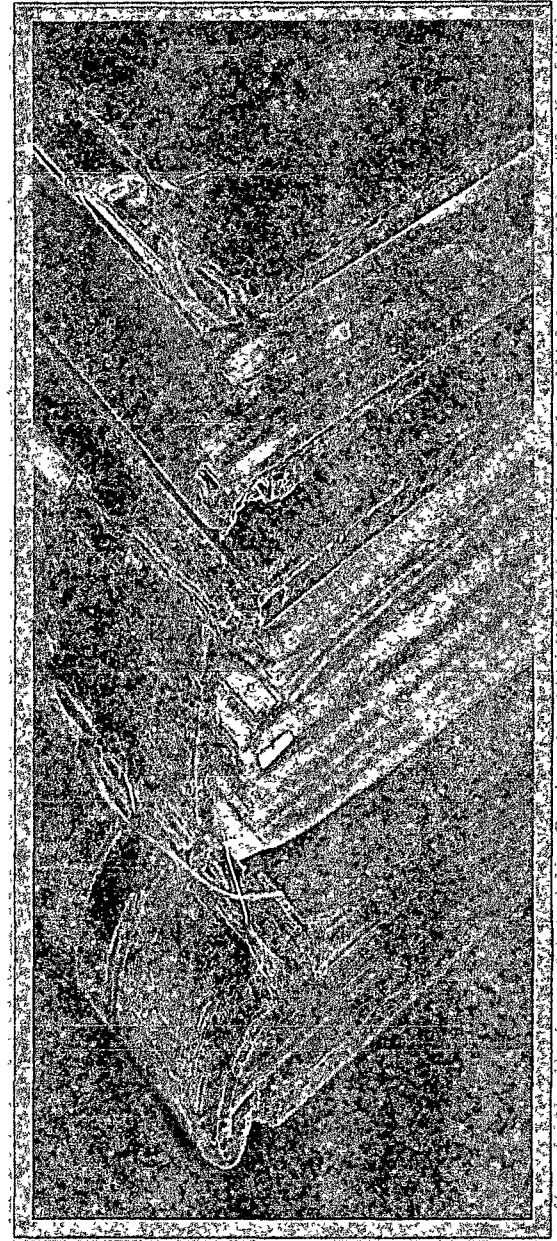
*Capturing History....*

*Defining the Future*

# **CASE FILE SCAN & INDEX PROPOSAL**

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DIR Contract Number - 4038



**PREPARED FOR:**

LINDSEY SMITH

District Clerk

PANOLA COUNTY

100 S. Sycamore, Room 227

Carthage, TX 75633

**PROPOSAL ISSUED:**

02/26/2021

# 2021

[www.datapreservationsolutions.com](http://www.datapreservationsolutions.com)



**DATA PRESERVATION SOLUTIONS**

*Capturing History*

*Defining the Future*

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# ABOUT THE COMPANY

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*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 county 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.

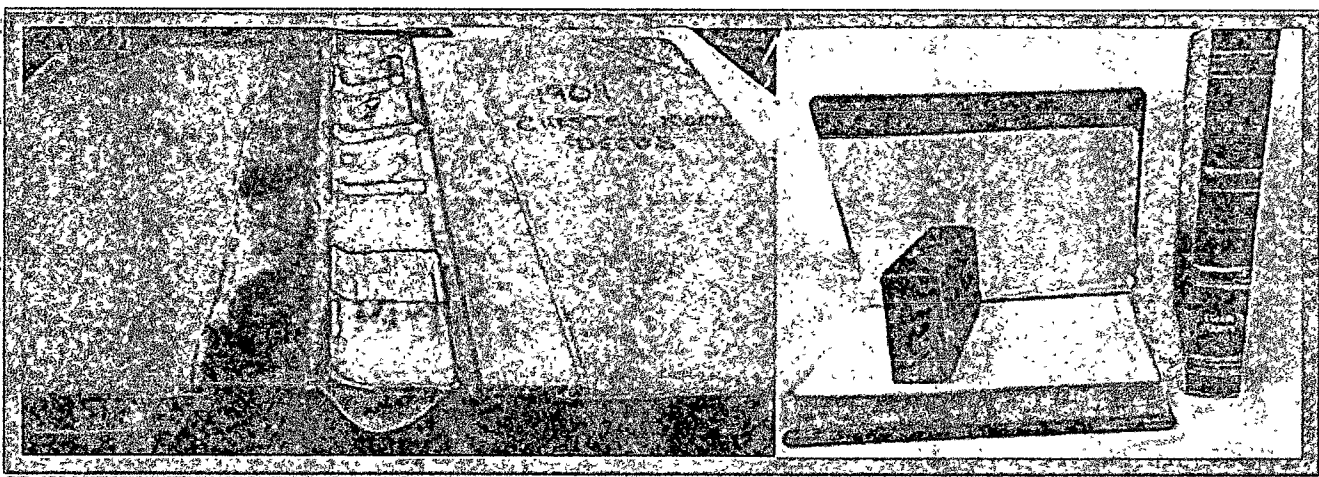
As microfilm was being edged out by digital technology, their understanding of the underlying "old school" imaging became highly coveted. Not only did they know how the equipment worked, they knew and understood the shortcomings of the storage media – from film to shucks to paper – and how to best preserve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

## GENERAL INDEX OF DEEDS

PARTIES		Kind of Deed	Date of Deed	AMOUNT OF CONSIDERATION		DESCRIPTION OF LAND	No. of Pkts.	No. of Pages
GRANTOR	GRANTEE			Doll.	Cts.			
<i>Blaine Moore</i>	<i>Robert Moore</i>	<i>Warranty</i>	<i>3/15/1993</i>	<i>1200.00</i>				
<i>Blaine Moore</i>	<i>Robert Moore</i>	<i>Warranty</i>	<i>3/15/1993</i>	<i>1200.00</i>				

### 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
- AIC
- CDIA
- 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

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## 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.

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## Chris Ruggles Software Sales Consultant

Chris joined DPS in 2015, coming from Fidlar of Texas (a subsidiary of Fidlar 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.

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# ABOUT THE TEAM

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## 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).

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## 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).

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# ABOUT THE TEAM

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## 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).

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## 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).

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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

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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**

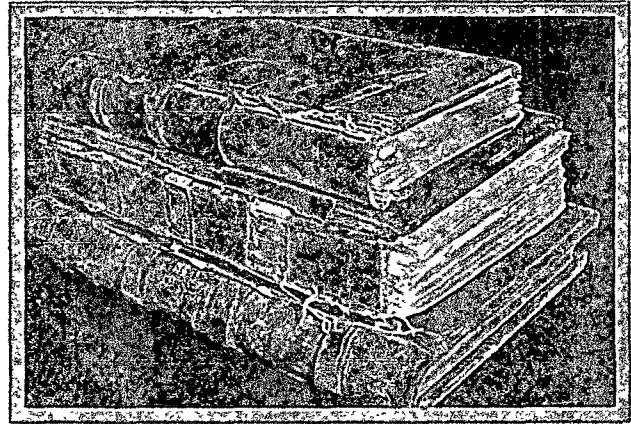
Property Fraud Alert is an internet-based system that automatically alerts your constituents, via email or phone, each time there is recording activity on a property owned by them. This early alert gives the victim valuable time to stop someone attempting to commit property fraud.

# PRESERVATION AND SCANNING PROCESS

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## DETAIL OF CASE FILE SCANNING AND INDEXING SERVICES

- A. Case File Scanning and Indexing – 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.



B. Conversion

i. Color and Bi-Tonal Images

1. Pages will be carefully scanned (converted to digital images) per County requirements.
2. DPS will use document capture hardware and software specifically designed to capture and process County government records images/pages.
3. DPS will scan all media at 300 dpi and provide images/pages in grayscale and color (where necessary) JPEG and bitonal .tif format.
4. 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.
5. DPS will deliver all images per the County's specifications as Group IV .tif or PDFs.

ii. Auto-Image Clean-Up

1. DPS will provide auto-image cropping for 100% of images/pages scanned.
2. DPS will provide auto de-skew for 100% of the images scanned.
3. 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 case within a folder labeled by case number.
2. Images within a folder will be identified by page.

C. Indexing

DPS will identify and index the case type following the standards used in the prior 2020 project and will index each case by case number, file date, and all parties including defendants and plaintiffs.

D. Flat Files Folders

- i. DPS will place finished case documents in heavy duty archival quality folders similar those currently used by the County.
  1. Pages will be loaded and secured with the folder clasp and in the page order received in the original folder.
- ii. DPS will apply letter and number labels for the case number similar to those found on the original case and will follow the same color pattern.
- iii. Cases requiring multiple folders will be numbered separately to note the order and quantity. For example, a case requiring two folders will be identified as 1 of 2 and 2 of 2.
- iv. Case files will be loaded back on the shelves in case number order. No storage boxes are required.

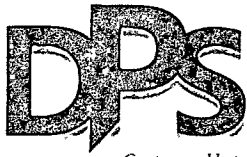
# PRESERVATION AND SCANNING PROCESS

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## E. Deliverables

- i. Monthly delivery of finished work.
- ii. Delivery of digital images at end of project.
  1. Delivered via USB drives.

# THE TIMELINE



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## Panola District Clerk Inventory

Date: 2/26/21

Book Type	Binding	Number Of Pages	Size	Price Per Page	Total Price	Comments
<b>Case File Scanning &amp; Indexing</b>						Scan case files. Staff will prep files. Pages will be in order.
Case Files	Flat Files	80,000	up to 11x14	\$ 0.25	\$20,000.00	Replace folder with new heavy duty folder, print scanned folder pages & load all pages on folder clasp. Label folder using letter and number stickers similar to those found on the original folder and following the same color scheme.
					\$	
					\$20,000.00	

### 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 loaded into new heavy duty legal sized folders similar to what the County currently use and secured by the folder clasp. Pages will be in the order received in the original folders.
4. Images will be stored by folder and will be indexed for case type, cause number, filing date and all parties (plaintiff and defendant).
5. DPS will scan Case Files up to the number of pages shown in the cost estimate or no more than \$20,000, as long as the last case is a complete case. No partial cases.

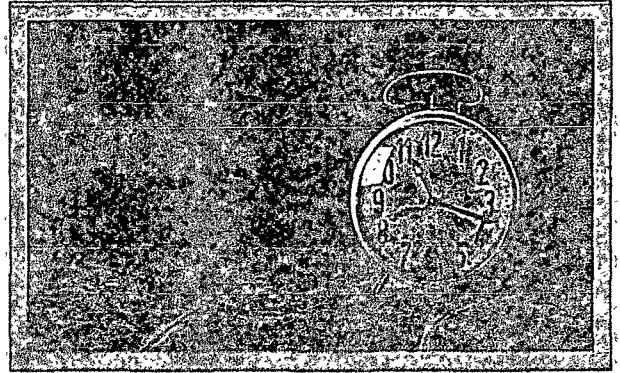
# THE TIMELINE

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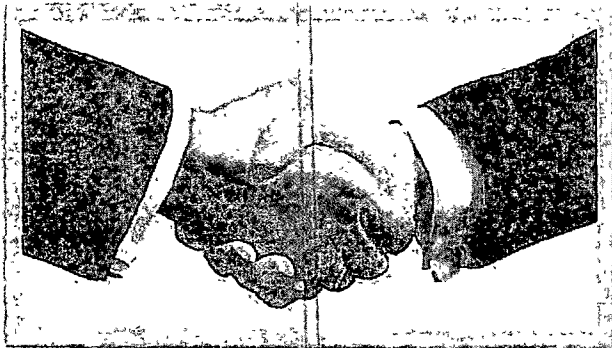
## PROJECT TIMELINE:

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:** Case files will be inventoried and checked-in within 4 hours of arrival at our Dallas, 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.
  - ii. Delivery will include finished cases plus images and indexes on USB drive.



# 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:

*LeeAnn Jones*

Printed Name:

*LeeAnn Jones*

Company:

*Panola County*

Date:

*3-16-21*

## For Data Preservation Solutions:

Authorized Signature:

*Brian L. Latte*

Printed Name:

*Brian L. Latte*

Company:

*DPS*

Date:

*3-17-21*