




# LEE'S SUMMIT MISSOURI

## MODIFICATION No. 1 OF AGREEMENT 2015-107

1. Modification Number and Date Modification #1                      DATE: September 19, 2016	2. Agreement Number: 2015-107 Agreement Period: October 15, 2015 – October 14, 2016									
3. Procurement Officer: DeeDee Tschirhart Telephone Number: 816-969-1087	4. Contractor Name/Address: MCCI 7940 Park Ridge Drive, Ft. Worth, TX 76137									
5. Issued by: City of Lee's Summit, MO Procurement and Contract Services Division 220 S.E. Green Street, Lee's Summit, MO 64063										
6. Special Instructions: Contractor is required to sign Block 8 showing acceptance of the below written modification and to return the original to address shown in Block 5 within 10 days after receipt, preferably by certified mail to insure a system of positive receipts. Modification shall be effective on the day of the City Manager's signature, unless otherwise designated.										
7. Description of Modification(s): 1. Implementation of Phase II: Assistance from MCCI to begin working with individual departments to roll out the City's overall Records Plan. The City has estimated that a total of nine days onsite will be needed to cover all required departments, to be done in three (3) different trips. The first engagement will be 3.5 days, to include an overview to all departments so they know what is expected prior to individual meetings. Phase II has a not to exceed amount of \$23,750.00. <table style="margin-left: 40px;"> <tr> <td>Phase I</td> <td>Not to Exceed Amount</td> <td>\$47,400.00</td> </tr> <tr> <td>Phase II</td> <td>Not to Exceed Amount</td> <td><u>\$23,750.00</u></td> </tr> <tr> <td colspan="2"><b>REVISED AGREEMENT NOT TO EXCEED AMOUNT</b></td> <td><b>\$71,150.00</b></td> </tr> </table> <p style="margin-left: 40px;">Reference Council Approval of Phase I, Ordinance Number 7727 on October 15, 2015.</p> 2. Revised Contract Expiry Date: From                      October 14, 2016 To                              April 30, 2017		Phase I	Not to Exceed Amount	\$47,400.00	Phase II	Not to Exceed Amount	<u>\$23,750.00</u>	<b>REVISED AGREEMENT NOT TO EXCEED AMOUNT</b>		<b>\$71,150.00</b>
Phase I	Not to Exceed Amount	\$47,400.00								
Phase II	Not to Exceed Amount	<u>\$23,750.00</u>								
<b>REVISED AGREEMENT NOT TO EXCEED AMOUNT</b>		<b>\$71,150.00</b>								
8. Contractor's Signature:  <hr/> Name President                      9/20/2017 <hr/> Title                                      Date	9. City of Lee's Summit, Missouri <hr/> Stephen A. Arbo, City Manager                      Date  APPROVED AS TO FORM: <hr/> Office of the City Attorney                      Date									
10. Distribution: Original: Bid File Copies to: Contractor Using departments										

## Scope of Services – Phase 2

The City of Lee's Summit, MO desires assistance from MCCi to begin working with individual departments to roll out the City's overall Records Plan. The City has estimated that a total of 9 days onsite will be needed to cover all required departments. MCCi is proposing that this be separated into three different trips. The first engagement will be 3.5 days, with the first part being an overview to all departments so they know what is expected prior to their individual meetings.

### ***Phase 2 will incorporate:***

#### **Records Retention Assessment – Phase 2 Focus Areas**

##### Individual Department Meetings

- Purpose of Meetings:
  - Records Series Analysis for each department as pertaining to the State of Missouri Retention Schedules.
  - Assist departments with their specific records policies and implementing these into practice
  - Note – MCCi will provide written recommendations for the departments. However, the departments will need to actually write and adopt their specific records policies.
- MCCi will provide recommendations to include in departmental policies, procedures and practices to manage destruction, routing, storage, approval, amendment of the City's records.
- MCCi will provide standard forms, either hard copies or electronic, to assist in managing the destruction, routing, storage, approval, amendment, of the City's records.

#### **Availability of Information**

Materials/information needed for MCCi's assessment will be made available during regular business hours. The City of Lee's Summit shall provide access, within reason, and at no cost to the contractor, to all information relevant to the project.

#### **Requirements**

Department Liaisons will need to be scheduled prior to MCCi onsite time. They will need to be prepared to go through their files records series by record series, including the boxes that are currently stored at Iron Mountain.

Unknown boxes should be identified and pulled. MCCi Records Manager will assist in helping the departments decide whether to scan, retain paper, or destroy the records. This will be summarized in the final report for the departments, as well as recommendations regarding destruction process and if some records should be left at Iron Mountain or not.

## **PAYMENT & BILLING TERMS**

This project will be invoiced upon completion of the proposed professional services, as outlined herein:

- Milestone 1:
  - Completion of First Onsite Meetings – 3.5 Days Onsite, 12 Hours CRM, 2 Hour Project Management
  - Deliverables:
    - Onsite Kickoff Meeting with all department liaisons to set expectations and outline schedules.
    - Onsite Meetings as explained in “Phase 2 Focus Area” above.
    - Written report as explained above.
- Milestone 2:
  - Completion of Second Onsite Meetings – 3 Days Onsite, 12 Hours CRM, 1 Hours Project Management
  - Deliverables:
    - Onsite Meetings as explained in “Phase 2 Focus Area” above.
    - Written report as explained above.
- Milestone 3:
  - Completion of Third Onsite Meetings – 3 Days Onsite, 12 Hours CRM, 1 Hour Project Management
  - Deliverables:
    - Onsite Meetings as explained in “Phase 2 Focus Area” above.
    - Written report as explained above.

**TASK/PERSONNEL BREAKDOWN**

Task No.	Description Of Task	Personnel Classification	Est Hours Per Personnel	Hourly Rate	Total Cost
<i>Records Management Consulting Days Onsite</i> <i>*Delivered by Certified Records Manager (CRM)</i> <i>*\$1,900 Daily Rate</i> <i>*Travel Expenses Included</i>	See Project scope above for detailed description of onsite time.	MCCi – Certified Records Manager Lee’s Summit – Project Manager, Records Manager, Departmental Liaisons involved in the records process (will only be needed during their allotted times)	9.5 Days Onsite	<i>\$1,900 Daily Rate</i> <i>*Travel Expenses Included</i>	\$18,050
<i>The onsite days will be scheduled across three different trips, each trip will be three days. The first trip will be 3.5 days.</i>					
<i>MCCi CRM Hourly Rate, per hour</i>	Report Development and data compilation as a result of the onsite time engaged with departments.	MCCi – Certified Records Manager	36	\$140	\$5,040
<i>MCCi Project Management Services</i>	Coordination of schedules for MCCi Records Manager in conjunction with Lee’s Summit staff. Overall management of project deliverables.	MCCi – Project Manager	4	\$165	\$660
<b>Project Total Cost</b>					<b>\$23,750</b>