



From



## City of Rancho Santa Margarita, CA, City Clerk's Office

### City Clerk Finds Smead a "Terrific Partner"

A seasoned government professional, Molly McLaughlin has worked in city clerk offices since 1995. She's not easily impressed, but when she became Rancho Santa Margarita's city clerk in 2007, the SmeadSoft Records Management System (RMS) she inherited won her over. "I came from a much larger, more established city in Southern California, where we spent a lot of money on our records management system. So I was used to a top-notch system. But I was pleasantly surprised with the SmeadSoft RMS from TAB. Compared to the complex system I used before, it's user-friendly, efficient and less expensive. And the TAB team always delivers the kind of proactive support and vision that make them a terrific partner."

McLaughlin is all about the bottom line and productivity. "We're a small but growing city with a staff of only 2.75 people, so we have to be efficient and productive. We're serving the public, all departments that make up Rancho's city government, and working with many outside vendors. We must be able to provide all of these constituents with the information they need quickly and easily."

### Productivity and compliance benefits

Rancho Santa Margarita has begun to image and track all city business documents electronically—resolutions, ordinances, contracts, project files and more. The city clerk's office is also working with all city departments to expand the system. The goal: Get all city documents in the system. McLaughlin says TAB's team is a big help. "They're proactive. When we had a huge backlog of building plan images that needed to be put into the records management system, they handled the migration and virtually eliminated our backlog."

McLaughlin added, "Knowledge workers spend 30 percent of their time searching for information. We simply can't afford to do that, and our customers can't afford to wait. SmeadSoft RMS lets us instantly locate any of the 9,000 documents that are currently in our system. We don't have to leave our desk to retrieve a paper file. I don't have to tell you what kind of time this saves."

### SmeadSoft Customer

City of Rancho Santa Margarita,  
California, City Clerk's Office.

### Challenge

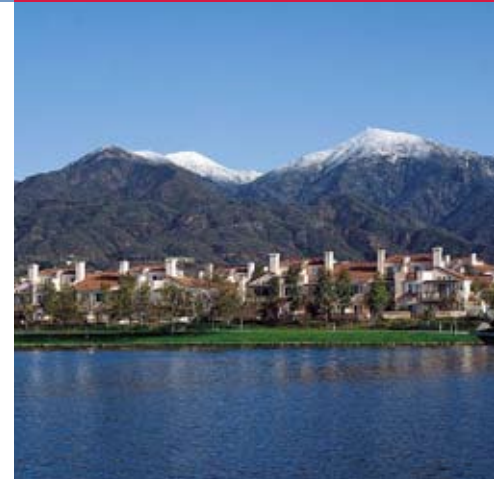
Enable small staff to manage fast-growing city's records and comply with public disclosure regulations.

### Solution

SmeadSoft Records Management System

### Results

- Staff of 2.75 people easily manages tens of thousands of city documents.
- Providing documents quickly to other departments and the public facilitates information management and encourages productive and transparent government.
- Ability to quickly answer citizens' requests for public information via email enables city to be compliant with public disclosure regulations (The Public Records Act).



In addition to improving productivity for the city's operations, SmeadSoft RMS enables the city to comply with public disclosure regulations. "As the keeper of records," explains McLaughlin, "we are required to provide timely responses to community and citizen requests for public records, such as building plans, permits, the city's budget, and staff reports for the city council—within days. That's what transparent government is all about, and SmeadSoft makes it possible to sometimes provide this information within minutes."

#### **"TAB is always there for us."**

McLaughlin says TAB's support team is the kind of partner her office needs. "They've helped us gain the trust of our customers because we can get them the information they need quickly. Smead is helping us integrate our paper and electronic records management system. And we trust them to keep us ahead of the techno curve and help us work more efficiently."

TAB continues to help the city clerk's office get more from its SmeadSoft RMS. McLaughlin explains, "From my experience, I'd say that 80 percent of what cities do is pretty universal, but that other 20 percent needs additional tweaking to fit our particular needs. Smead does both well. For instance, Smead is helping us expand our search for tract maps that the planning department might need. By cross-referencing a map by address, document number, neighborhood, etc., we have more options for finding a document with little information. In other words, we're able to improve the ability to cross reference our documents into the system, so we can access our information from numerous directions."

Although McLaughlin inherited the SmeadSoft RMS, she has the authority to retain it or replace it. She says she not only plans to keep it, but also expand it citywide. "As our city and our needs grow, I'm confident that TAB's SmeadSoft solution will be there to support us. They've gone out of their way to make sure we are a happy customer. Whenever we say we want to do something more, they find a way to help us do it."



Get Organized. Get TAB.