



# STAFF REPORT

AGENDA NO: 9e

MEETING DATE: October 6, 2025

**To: Honorable Mayor and City Council**

**Date: October 6, 2025**

**From: Meaghan Hassel-Shearer, City Clerk – (650) 558-7203**

**Subject: Adoption of a Resolution Declaring Laserfiche a Trusted System and Adopting (1) a Records Management Policy, (2) Procedures for Managing Records, and (3) Procedures for Searching, Storing, and Deleting Records in Laserfiche**

## **RECOMMENDATION**

Staff recommends that the City Council adopt the attached resolution declaring Laserfiche a Trusted System and adopting:

1. A Records Management Policy
2. Procedures for Managing Records, and
3. Procedures for Searching, Storing, and Deleting Records in Laserfiche

## **BACKGROUND**

In January 2018, the City entered into an agreement with ECS Imaging, Inc. (now MCCi, LLC) for the purchase and installation of Laserfiche. (Resolution No. 018-2018). Laserfiche acts as the City's Records Repository. The Laserfiche Repository not only makes records more accessible to the public and staff, but it also protects and preserves the City's permanent records.

On June 18, 2018, the City Council adopted Resolution Number 084-2018, which established a City-Wide Records Retention Schedule. This schedule outlines the different types of records that the City has and the length of time the City is required to keep each record. Additionally, pursuant to the Records Retention Schedule, staff can file a destruction form for certain paper records after the paper records are (1) scanned, (2) quality checked, and (3) indexed on an unalterable media.

The keeping of records related to City business is not required after a certain period of time for the effective and efficient operation of City government. California Government Code Section 34090, et seq. provides the parameters and processes regarding when a City record has served its purpose, is no longer required, and therefore can be destroyed. In particular, California Government Code Section 34090.5 requires that certain records are reproduced on a "Trusted System" before they are destroyed. California Government Code Section 12168.7 provides uniform statewide standards for storing documents in electronic media and defines a Trusted System as "a combination of technologies, policies, and procedures for which there is no plausible scenario in which a public record retrieved from or reproduced by the system could differ substantially from the public record that is originally stored."

The Secretary of State has adopted Trustworthy Electronic Document or Record Preservation regulations, located in Chapter 15, Division 7, Title 2 of the California Code of Regulations, which govern the recording, storing, and reproducing of records in electronic media where the intent is to destroy the original hard copy and maintain the electronic copy as the official record.

## **DISCUSSION**

As the City moves its Laserfiche repository from an on-site server to the Cloud, the City Council needs to declare Laserfiche a Trusted System. As previously stated, a Trusted System is “a combination of technologies, policies, and procedures.” The City Clerk’s Office worked to establish that these elements are all included in the City’s Trusted System.

### **1. Policies and Procedures**

The City Clerk’s Office developed a Records Management Policy and Procedures for Managing Records after consultation with neighboring cities San Mateo and Millbrae. Both cities utilize Laserfiche as their records repository. The Records Management Policy outlines the importance of City records and the roles that individuals within the government play in preserving, storing, and properly destroying records pursuant to the Records Retention Schedule. The Procedures for Managing Records reviews the life cycle of a City Record and how to properly maintain records.

Additionally, the City Clerk’s Office developed Procedures for Searching, Storing, and Deleting Records in Laserfiche. This document outlines the process for ensuring that electronic documents are quality checked, properly stored, and then disposed of pursuant to the Records Retention Schedule.

### **2. Technology**

The City uses Laserfiche to electronically store records in pdf format. Laserfiche was selected because it has audit capabilities to track records as they are added, deleted, and viewed in the system. Additionally, the City Clerk’s Office has enabled folder level permissions and restrictions to ensure only appropriate personnel have access to records in Laserfiche.

Moreover, Laserfiche’s technology has multiple levels of security in order to ensure records are protected including:

- Encryption in Transit – all data sent between Laserfiche customers and applications is encrypted in transit
- Penetration Testing – Laserfiche engages third-party vendors to conduct external penetration testing of the Laserfiche Cloud system
- Intrusion Detection – Laserfiche Cloud utilizes host-based intrusion detection systems to reduce the risk of data theft by individuals or organizations attempting to gain unauthorized access
- Firewalls – Laserfiche Cloud’s firewall configuration settings are regularly reviewed based on industry standards.
- Fine-Grained Access Control – Administrators can use access rights to limit and control access to individual documents and objects

- Multi-Factor Authentication
- Repository Audit Log – includes details of user actions, including viewing, modifying, creating, and deleting documents.
- SOC 2 Type 2 Certified
- Automated Backups – Laserfiche Cloud customer data is backed up multiple times per day. Backups are retained for defined periods with support for point in time recovery. All backup data is encrypted. Backup data is replicated and stored in geographically separate data centers. Backup and restoration is tested on at least a quarterly basis.

To see a full description of the protections included in the Laserfiche Cloud, please see Exhibit D.

Collectively, the City's comprehensive Retention Schedule, Records Management Policy, Procedures for Managing Records, Procedures for Searching, Storing, and Deleting Records in Laserfiche, and the Laserfiche technology constitute a Trusted System in accordance with State law.

### **FISCAL IMPACT**

There is no fiscal impact.

Exhibits:

- Resolution
- Exhibit A – Records Management Policy
- Exhibit B – Procedures for Managing Records
- Exhibit C – Procedures for Searching, Storing, and Deleting Records in Laserfiche
- Exhibit D – Laserfiche Cloud Security and Compliance Document