



August 24, 2023

Erin Cartwright Weinstein
Clerk of the Circuit Court
Lake County
18 N. County Street
Waukegan, IL 60085

Ruth Anne Hall
Purchasing Manager
Lake County
18 N. County Street
Waukegan, IL 60085

Re: Proposal for Contract Modification

Dear Ms. Cartwright Weinstein and Ms. Hall:

Mission Critical Partners, LLC (MCP) appreciates the opportunity to continue our professional services to Lake County (the County) for quality assurance assistance services. We have been providing services under the letter of agreement from Ms. Hall dated November 2, 2021. The intent of this proposal is to enter into a third modification of the agreement to clarify roles, expectations, and monthly cost.

We propose to provide project management services specifically targeted at the Clerk's document digitization project as described below:

- Assist with onsite and offsite document migration from DocDNA to Lake County's Integrated Case Management System.
- Review of Initial case type set up for onsite and offsite scanning for the following case types: CH, TD, ED, JA, MT, ROP, PSI/Evals, Impounded, Sealed and Confidential.
- Complete initial quality control of onsite and offsite scanning, monitoring and any needed resolution to issues.
- Assist with Microfilm and Microfiche Records.
- Attend weekly project status meetings with Exela and monthly KPI Productivity meetings with Exela.
- Update project plans.
- Run Weekly Metadata reports and send to Lake County staff.
- Follow up on unexpected issues and coordinate resolution with Lake County staff and Exela.

The primary service provider from MCP is expected to be Jennifer Chipley, Project Manager. Her hourly rate is \$233.00 per hour and is the basis for cost estimates shown in Tables 1 through 5.



The County will pay the Contractor an additional fee not to exceed \$80,220.00. See Tables 1 through 6 for the billing schedules and outline of tasks.

Table 1 – Billing Schedule for October 2023

October 2023 will include 21 hours per month for Onsite and Offsite Digitization Assistance, 31 hours per month for Onsite and Offsite Document Migration and 8 hours per month for Microfilm. Total of 60 hours for October 2023.

Scope of Work	Period	Hours Per Month	Hours Per Week	Monthly Amount
Onsite and Offsite Digitization Assistance	October 2023	21	4	\$4,893.00
Onsite and Offsite Document Migration	October 2023	31	6	\$7,223.00
Microfilm	October 2023	8	2	\$1,864.00
Total	October 2023	60	12	\$13,980.00

Table 2 – Billing Schedule for November 2023

November 2023 will include 16 hours per month for Onsite and Offsite Digitization Assistance, 21 hours per month for Onsite and Offsite Document Migration and 8 hours per month for Microfilm. Total of 45 hours for November 2023.

Scope of Work	Period	Hours Per Month	Hours Per Week	Monthly Amount
Onsite and Offsite Digitization Assistance	November 2023	16	4	\$3,728.00
Onsite and Offsite Document Migration	November 2023	21	5	\$4,893.00
Microfilm	November 2023	8	2	\$1,864.00
Total	November 2023	45	11	\$10,485.00

Table 3 – Billing Schedule for December 2023

December 2023 will include 11 hours per month for Onsite and Offsite Digitization Assistance and 8 hours per month for Microfilm. Onsite Digitization may be completed December 2023 or hours decreased. Total of 19 hours for December 2023.

Scope of Work	Period	Hours Per Month	Hours Per Week	Monthly Amount
Onsite and Offsite Digitization Assistance – December 2023 (Onsite May Be Completed December 2023 or Hours Decreased)	December 2023	11	3	\$2,563.00
Microfilm	December 2023	8	2	\$1,864.00
Total	December 2023	19	5	\$4,427.00

Table 4 – Billing Schedule for January 2024 Through December 2024

January 2024 through December 2024 will include 10 hours per month for Offsite Digitization. Offsite Digitization most likely will be completed before December 2024 so a new modification may be needed. Eight hours per month for Microfilm. Total of 18 hours per month for January 2024 through December 2024.

Scope of Work	Period	Hours Per Month	Hours Per Week	Monthly Amount
Offsite Digitization (This Will Most Likely be Completed Before December 2024).	January 2024 through December 2024 (12 Months)	10x12=120	2	\$27,960.00
Microfilm	January 2024 through December 2024 (12 Months)	8x12=96	2	\$23,368.00
Total	January 2024 through December 2024 (12 Months)	18 hours per month or 216 hours per year	4 hours per week or 208 hours per year	\$4,277.33 per month of \$51,328.00 per year.



Table 5 – Billing Schedule for All

Period	Monthly Amount	Payment Status	Included in the Modification
October 2023 (1 Month)	\$13,980.00	Planned	\$13,980.00
November 2023 (1 Month)	\$10,485.00	Planned	\$10,485.00
December 2023 (1 Month)	\$4,427.00	Planned	\$4,427.00
January 2024 through December 2024 (12 Months)	\$4,277.33	Planned	\$51,328.00
Total			\$80,220.00



Table 6 – Outline of Tasks

ID	Task Name	Duration	Start	Finish	Estimated MCP Hours Per Month	Comments
1	Lake County, IL Digitization, Document Migration and Microfilm	317 days?	Mon 10/2/23	Tue 12/31/24		
2	Onsite and Offsite Digitization - October 2023	22 days?	Mon 10/2/23	Tue 10/31/23	21 hours total	
3	Onsite Digitization	22 days?	Mon 10/2/23	Tue 10/31/23		
4	October 2023	22 days?	Mon 10/2/23	Tue 10/31/23	21 hours total	
5	Metadata Reports to Lake County	22 days	Mon 10/2/23	Tue 10/31/23	1	.25 hours per week/1 hour per month
6	Update Project Plan	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
7	Exela Status Meeting	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
8	IRAD Log	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
9	QA/QC	22 days	Mon 10/2/23	Tue 10/31/23	5	Estimated 5 hours per month depending on case type.
10	KPI Productivity Meeting	22 days	Mon 10/2/23	Tue 10/31/23	1	1 hour per month.
11	Administrative (Can include e-mails between Exela and Lake County on questions, issues, concerns, updating Teams calendar with out of office, etc).	22 days	Mon 10/2/23	Tue 10/31/23	5	1 hour per week/5 hours per month
12	Offsite Digitization - Subject to Change - Could go After Microfilm and Not Ran Concurrently	22 days?	Mon 10/2/23	Tue 10/31/23		
13	October 2023	22 days?	Mon 10/2/23	Tue 10/31/23	0 hours total	
14	Metadata Reports to Lake County	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 5 for Onsite Digitization.
15	Update Project Plan	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 6 for Onsite Digitization.
16	Exela Status Meeting	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 7 for Onsite Digitization.
17	IRAD Log	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 8 for Onsite Digitization.
18	QA/QC	22 days?	Mon 10/2/23	Tue 10/31/23		Included in Task 9 for Onsite Digitization.
19	KPI Productivity Meeting	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 10 for Onsite Digitization.
20	Onsite and Offsite Document Migration - October 2023	22 days?	Mon 10/2/23	Tue 10/31/23	31 hours total	
21	Onsite Document Migration	22 days?	Mon 10/2/23	Tue 10/31/23		
22	October 2023	22 days	Mon 10/2/23	Tue 10/31/23	22 hours total	
23	cPortal Reports	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
24	Update Onsite Document Migration Excel Spreadsheet with New Batches	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
25	Update Onsite Document Migration Excel Spreadsheet with Dates of Batches Sending to Exela and JTI	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
26	Migration Calculations	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
27	Update Project Plan	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
28	ICMS Weekly Call	22 days	Mon 10/2/23	Tue 10/31/23	5	1 hour per week/5 hours per month
29	IRAD Log	22 days	Mon 10/2/23	Tue 10/31/23	2	.25 hours per week/2 hours per month
30	Offsite Document Migration	22 days	Mon 10/2/23	Tue 10/31/23		
31	October 2023	22 days	Mon 10/2/23	Tue 10/31/23	9 hours total	
32	cPortal Reports	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
33	Update Offsite Document Migration Excel Spreadsheet with New Batches	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
34	Update Offsite Document Migration Excel Spreadsheet with Dates of Batches Sending to Exela and JTI	22 days	Mon 10/2/23	Tue 10/31/23	3	.50 hours per week/3 hours per month
35	Migration Calculations	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 26 of Onsite Document Migration.
36	Update Project Plan	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 27 of Onsite Document Migration.
37	ICMS Weekly Call	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 23 of Onsite Document Migration.
38	IRAD Log	22 days	Mon 10/2/23	Tue 10/31/23		Included in Task 28 of Onsite Document Migration.
39	Microfilm - October 2023	22 days?	Mon 10/2/23	Tue 10/31/23	8 hours total	
40	October 2023	22 days?	Mon 10/2/23	Tue 10/31/23	8 hours total	
41	Exact tasks to be determined but may include Implementation Plan testing, validation, approval, reports ran, monitoring the initial plan, status meetings, status reports, updating project plan	22 days	Mon 10/2/23	Tue 10/31/23	8	6-8 hours per month

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ID	Task Name	Duration	Start	Finish	Estimated MCP Hours Per Month	Comments
42	Onsite and Offsite Digitization - November 2023	20 days?	Wed 11/1/23	Thu 11/30/23	16 hours total	
43	Onsite Digitization	20 days?	Wed 11/1/23	Thu 11/30/23		
44	November 2023	20 days?	Wed 11/1/23	Thu 11/30/23	16 hours total	
45	Metadata Reports to Lake County	20 days	Wed 11/1/23	Thu 11/30/23	1	.25 hours per week/1 hour per month
46	Update Project Plan	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
47	Exela Status Meeting	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
48	IRAD Log	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
49	QA/QC	20 days	Wed 11/1/23	Thu 11/30/23	4	Estimated 4 hours per month depending on case type.
50	KPI Productivity Meeting	20 days	Wed 11/1/23	Thu 11/30/23	1	1 hour per month.
51	Administrative (Can include e-mails between Exela and Lake County on questions, issues, concerns, updating Teams calendar with out of office, etc).	20 days	Wed 11/1/23	Thu 11/30/23	4	1 hour per week/4 hours per month
52	Offsite Digitization - Subject to Change - Could go After Microfilm and Not Ran Concurrently	20 days?	Wed 11/1/23	Thu 11/30/23		
53	November 2023	20 days?	Wed 11/1/23	Thu 11/30/23	0 hours total	
54	Metadata Reports to Lake County	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 44 for Onsite Digitization.
55	Update Project Plan	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 45 for Onsite Digitization.
56	Exela Status Meeting	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 46 for Onsite Digitization.
57	IRAD Log	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 47 for Onsite Digitization.
58	QA/QC	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 48 for Onsite Digitization.
59	KPI Productivity Meeting	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 49 for Onsite Digitization.
60	Onsite and Offsite Document Migration - November 2023	20 days?	Wed 11/1/23	Thu 11/30/23	17-21 hours total	
61	Onsite Document Migration	20 days?	Wed 11/1/23	Thu 11/30/23		
62	November 2023	20 days	Wed 11/1/23	Thu 11/30/23	11-15 hours total	
63	cPortal Reports	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
64	Update Onsite Document Migration Excel Spreadsheet with New Batches	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
65	Update Onsite Document Migration Excel Spreadsheet with Dates of Batches Sending to Exela and JTI	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
66	Migration Calculations	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
67	Update Project Plan	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
68	ICMS Weekly Call - May Not Need	20 days	Wed 11/1/23	Thu 11/30/23	4	1 hour per week/4 hours per month
69	IRAD Log	20 days	Wed 11/1/23	Thu 11/30/23	1	.25 hours per week/1 hour per month
70	Offsite Document Migration	20 days?	Wed 11/1/23	Thu 11/30/23		
71	November 2023	20 days?	Wed 11/1/23	Thu 11/30/23	6 hours total	
72	cPortal Reports	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
73	Update Offsite Document Migration Excel Spreadsheet with New Batches	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
74	Update Offsite Document Migration Excel Spreadsheet with Dates of Batches Sending to Exela and JTI	20 days	Wed 11/1/23	Thu 11/30/23	2	.50 hours per week/2 hours per month
75	Migration Calculations	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 66 of Onsite Document Migration.
76	Update Project Plan	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 67 of Onsite Document Migration.
77	ICMS Weekly Call	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 68 of onsite document migration.
78	IRAD Log	20 days	Wed 11/1/23	Thu 11/30/23		Included in Task 69 of onsite document migration.
79	Microfilm - November 2023	20 days?	Wed 11/1/23	Thu 11/30/23	8 hours total	
80	November 2023	20 days?	Wed 11/1/23	Thu 11/30/23	8 hours total	
81	Exact tasks to be determined but may include Implementation Plan testing, validation, approval, reports ran, monitoring the initial plan, status meetings, status reports, updating project plan	20 days	Wed 11/1/23	Thu 11/30/23	8	6-8 hours per month

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ID	Task Name	Duration	Start	Finish	Estimated MCP Hours Per Month	Comments
82	Onsite and Offsite Digitization - December 2023 - Onsite May Be Completed December 2023 or Hours Decreased	20 days?	Fri 12/1/23	Fri 12/29/23	13 hours total	
83	Onsite Digitization	20 days?	Fri 12/1/23	Fri 12/29/23		
84	December 2023	20 days?	Fri 12/1/23	Fri 12/29/23	11 hours total	
85	Metadata Reports to Lake County	20 days	Fri 12/1/23	Fri 12/29/23	1	.25 hours per week/1 hours per month
86	Update Project Plan	20 days	Fri 12/1/23	Fri 12/29/23	1	.25 hours per week/1 hour per month
87	Exela Status Meeting	20 days	Fri 12/1/23	Fri 12/29/23	1	.25 hours per week/1 hour per month
88	IRAD Log	20 days	Fri 12/1/23	Fri 12/29/23	1	.25 hours per week/1 hour per month
89	QA/QC	20 days	Fri 12/1/23	Fri 12/29/23	4	Estimated 4 hours per month depending on case type.
90	KPI Productivity Meeting	20 days	Fri 12/1/23	Fri 12/29/23	1	1 hour per month.
91	Administrative (Can include e-mails between Exela and Lake County on questions, issues, concerns, updating Teams calendar with out of office, etc).	20 days	Fri 12/1/23	Fri 12/29/23	2	.50 hours per week/2 hours per month
92	Offsite Digitization - Subject to Change - Could go After Microfilm and Not Ran Concurrently	20 days	Fri 12/1/23	Fri 12/29/23		
93	December 2023	20 days	Fri 12/1/23	Fri 12/29/23	0 hours total	
94	Metadata Reports to Lake County	20 days	Fri 12/1/23	Fri 12/29/23		Included in Task 85 of Onsite Digitization.
95	Update Project Plan	20 days	Fri 12/1/23	Fri 12/29/23		Included in Task 86 of Onsite Digitization.
96	Exela Status Meeting	20 days	Fri 12/1/23	Fri 12/29/23		Included in Task 87 of Onsite Digitization.
97	IRAD Log	20 days	Fri 12/1/23	Fri 12/29/23		Included in Task 88 of Onsite Digitization.
98	QA/QC	20 days	Fri 12/1/23	Fri 12/29/23		Included in Task 89 of Onsite Digitization.
99	KPI Productivity Meeting	20 days	Fri 12/1/23	Fri 12/29/23		Included in Task 90 of Onsite Digitization.
100	Microfilm - December 2023	20 days?	Fri 12/1/23	Fri 12/29/23	8 hours total	
101	December 2023	20 days?	Fri 12/1/23	Fri 12/29/23	8 hours total	
102	Exact tasks to be determined but may include Implementation Plan testing, validation, approval, reports ran, monitoring the initial plan, status meetings, status reports, updating project plan	20 days	Fri 12/1/23	Fri 12/29/23	8	6-8 hours per month



ID	Task Name	Duration	Start	Finish	Estimated MCP Hours Per Month	Comments
103	Offsite Digitization - January 2024 through December 2024 - Subject to Change - Could go After Microfilm and Not Ran Concurrently	255 days?	Mon 1/1/24	Tue 12/31/24	10 hours total	
104	Offsite Digitization - Subject to Change - Could go After Microfilm and Not Ran Concurrently	255 days?	Mon 1/1/24	Tue 12/31/24		
105	January 2024 through December 2024	255 days?	Mon 1/1/24	Tue 12/31/24	10 hours total	
106	Metadata Reports to Lake County	256 days	Mon 1/1/24	Tue 12/31/24	1	.25 hours per week/1 hour per month
107	Update Project Plan	256 days	Mon 1/1/24	Tue 12/31/24	1	.25 hours per week/1 hour per month
108	Exela Status Meeting	256 days	Mon 1/1/24	Tue 12/31/24	2	.50 hours per week/2 hours per month
109	IRAD Log	256 days	Mon 1/1/24	Tue 12/31/24	1	.25 hours per week/1 hour per month
110	QA/QC	256 days	Mon 1/1/24	Tue 12/31/24	4	Estimated 4 hours per month depending on case type.
111	KPI Productivity Meeting	256 days	Mon 1/1/24	Tue 12/31/24	1	1 hour per month
112	Microfilm - January 2024 through December 2024	255 days?	Mon 1/1/24	Tue 12/31/24	8 hours total	
113	January 2024 through December 2024	255 days?	Mon 1/1/24	Tue 12/31/24	8 hours total	
114	Exact tasks to be determined but may include Implementation Plan testing, validation, approval, reports ran, monitoring the initial plan, status meetings, status reports, updating project plan	256 days	Mon 1/1/24	Tue 12/31/24	8	6-8 hours per month



If you should have any questions, please feel free to contact me at 206.849.7772 (cell), or via email at JoeWheeler@MissionCriticalPartners.com.

On behalf of our entire team, we stand behind Lake County to serve as your partner and your advocate.

Sincerely,

Mission Critical Partners, LLC

A handwritten signature in black ink that reads 'Joe Wheeler'. The signature is fluid and cursive, with the first name 'Joe' and last name 'Wheeler' clearly distinguishable.

Joe Wheeler

Vice President, Justice Management and Technology Services