

DATE: October 12, 2020

TO: RuthAnne K. Hall, Purchasing Manager

FROM: Erin Cartwright Weinstein, Lake County Circuit Court Clerk

RE: Bid Exemption Request for Lake County Circuit Clerk's Office for Document Digitization
& Mobile Application projects

Lake County Circuit Clerk's Office is requesting a bid exemption to enter into an agreement with MTG Management Consulting, Inc. to provide project management services for the Circuit Clerk's Record Digitization project. The reason for the sole source procurement is based on the long-standing, productive relationship between MTG Management Consulting, Inc. and the Lake County Circuit Clerk's Office. MTG Management Consulting, Inc. is currently the project manager for all four justice partners State's Attorney, Public Defender, Circuit Court Clerk and Courts; to oversee the implementation of the new case management system, and is working on a separate endeavor as the project manager with the Circuit Clerk's Office to develop a contract with Exela Technologies for Document Digitization service. The agreement would be funded through the Circuit Clerk and Court's special revenue fund, Document Storage for \$91,960.00 which would be paid over a period of two years. The expansion of the current agreement with MTG Management Consulting, Inc. would continue MTG Management Consulting, Inc's services to the Circuit Clerk's Office through the completion of Exela Technologies and Journal Technologies' obligations on their contracts. The contracts run concurrently and are related to one another in order that the new case management system to provide the services in which we contracted.

SCOPE OF WORK:

The Lake County Circuit Clerk's Office is involved in two major projects. The first is the implementation of the new case management system. The case management system will allow for the extension of services to the public through a web browser platform, providing remote services to the public and enhanced efficiencies. Additionally, the case management system will allow the Lake County Courts to become e-record and terminate the use of paper in their daily record keeping. In order to have an e-record platform, all current paper documents must be digitized and uploaded to the cloud. Once documents have been uploaded, they will be absorbed by the case management system and be available electronically and remotely. The merger of the documents to the case management system will occur in later phases of the case management systems' implementation. The documents will be managed by Exela Technologies until this occurs. MTG Consulting is the current project manager for the implementation of the new case management system. MTG consulting was also contracted with the Lake County Circuit Clerk's Office to assist in choosing and contracting the services of a document digitization vendor. This phase of the project is completed.

Exela Technologies has begun the scanning process for the document digitization project with the Lake County Circuit Clerk's Office. It is necessary to continue the consulting services with MTG management between Exela and the Circuit Clerk's office to ensure the deliverables have been met pursuant to the contract, the cloud storage of the documents is appropriate and there is a fluent transition for the documents from Exela Technologies to the new case management system. Any mistakes in the aforementioned obligations could result in a more expensive and lengthier timeline for the complete implementation of the new case management system, and a disruption to access to justice. The goal of the projects which MTG Management Consulting, Inc. is the acting Project Manager in Lake County is to

provide a user friendly, efficient, and convenient remote platform for the public to engage with the court system without traveling to Waukegan.

MTG Management Consulting, Inc has been working with the Circuit Clerk's Office and the Justice Partners over the past two years acting as the Project Manager for the new case management system. MTG Consulting was chosen through an RFP process by the Justice Partners, and the relationship has been successful to date. The case management project has been moving along at the anticipated pace and deliverables have been completed in a timely manner. MTG Management Consulting, Inc has worked with numerous government agencies, including the implementation of prior case management systems and document digitization projects for other counties throughout the nation. They have the expertise and ability to make this a successful transition from a paper court system to an electronic court system.

MTG Consulting has the knowledge of the Lake County Justice Partner's visions, expectations, and requirements; along with a relationship with all four of the Justice Partners. Additionally, MTG is familiar with the Illinois laws and policies related to electronic records. Due to MTG Consulting's ongoing relationship and contracts with Lake County they will be able to continue the ongoing project without any delay.

Please see attached SOW for the obligations of MTG and the obligations of the Circuit Court Clerk pursuant to this contract.

MTG Consulting will invoice the Circuit Clerk's Office monthly per successful delivery of activities.