



Allison J. Ferreira  
Town Clerk

**TOWN OF MIDDLEBOROUGH**  
**Town Clerk's Office**  
*Bank Building, 20 Centre Street*  
*Middleborough, Massachusetts 02346-2250*  
*508-946-2415 phone*  
*508-946-2308 fax*

July 2, 2012

Community Preservation Committee  
Middleborough Town Hall Annex  
20 Centre Street  
Middleborough, MA 02346

Dear Members of the Community Preservation Committee:

Enclosed please find my application for Community Preservation eligibility for the Historic and Vital Records Preservation project.

I sincerely appreciate your consideration in this regard.

Should you have any questions or concerns, please do not hesitate to contact me at (508) 946-2415. I look forward to hearing from you.

Very truly yours,

Allison J. Ferreira  
Town Clerk

# STEP ONE

## TOWN OF MIDDLEBOROUGH APPLICATION FOR COMMUNITY PRESERVATION ELIGIBILITY

**NOTE: This application step enables the CPC to review the request to ensure eligibility and offer guidance. If eligible, Step 2 - Application for Funding must be completed.**

**Date:** June 29, 2012

**Project Title:** Historic and Vital Records Preservation

**Applicant/Contact Person:** Allison J. Ferreira

**Name of Organization:** Town of Middleborough Town Clerk's Office

**Address:** 20 Centre Street, Middleborough, MA 02346

**Telephone:** (508) 946-2415

**Email:** [aferreira@middleborough.com](mailto:aferreira@middleborough.com)

**CPA Category (check all that apply):**  
 Open Space                       Historic Preservation  
 Recreation                         Community Housing

**CPA Purpose (check all that apply)**  
 Acquire                               Create  
 Preserve                               Support  
 Rehabilitate / Restore

**CPA Funding Requested:** \$2,575

**Total Project Cost:** \$ 2,575

**Project Description:** Please provide a brief project description below. Include a brief description of how your project accomplishes the goals of the CPA and include an estimated budget. Please include supporting materials as necessary.

The project I am proposing is a Historic and Vital Records Preservation project for the Town of Middleborough. As the keeper of records for the Town of Middleborough, the Town Clerk's Office is responsible for the filing, storage and preservation of our historic and vital documents dating back to 1669. The maintenance and preservation of these documents is crucial to our history as well as the future of Middleborough. The current climate control, storage, filing and preservation system in use is inadequate at best; documents (most in paper form) are filed in several different areas and manners, many are stored in boxes in our basement that is prone to water damage and moisture. The vault has inadequate climate control and storage as well. All of which puts our historic and vital documents at risk to damage, mold and deterioration.

The goal of this project is to provide adequate climate control, filing, storage and microfilm and/or digital formatting of our historic and vital records. The climate control and proper storage will assist us in the preservation. A uniform filing system and microfilm/digital format will allow quick access and afford our residents and visitors access to these documents.

I am proposing a three (3) phase project. The first phase will be to contract a vendor (pursuant to Massachusetts General Laws, Chapter 30B) to conduct an assessment of our current filing and storage system for our historic and vital records. This phase is estimated to be completed in three (3) to five (5) days with a detailed description of recommendations. (*See attached quote*).

Phase two (2) of the project will consist of implementing the above recommendations and to contract a vendor (pursuant to Massachusetts General Laws, Chapter 30B) to analyze our current climate control system.

Phase three (3) of the project would include the archival, digitizing and microfilming of our historic and vital records and the repair or upgrade of the current climate control system.

I am confident this project is consistent with the goals of the Community Preservation Act (CPA) and the Town of Middleborough's Community Preservation Plan. In March 2006, the CPA statute was amended to include "documents and artifacts" within the definition of historic resources and under that statute I believe this project advances preservation of currently owned Town assets, the project is cost effective and the proposal identifies resources to continue maintenance of the project once completed.



## KING INFORMATION SYSTEMS, INC.

Main Office: 3 Edgewater Drive • Norwood, MA 02062 • Tel (781) 762-6477 • Fax (781) 769-1236  
Branch Office: 2701 Boston Road • Wilbraham, MA 01095 • Tel (413) 599-1377

July 1, 2012

Town of Middleborough  
Bank Building  
20 Centre Street  
Middleborough, MA 02346

Attn: Allison J. Ferreira

Dear Allison:

Per your request, this letter is to inform you that our consulting rate as of July 1, 2012 is \$515.00 per day, plus expenses.

Very truly yours,  
KING INFORMATION SYSTEMS, INC.

*Paula Macdonald*  
Paula R. Macdonald  
Account Representative

PRM/cb  
cc: Patricia M. Tigue  
President



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Main Office: 3 Edgewater Drive • Norwood, MA 02062 • Tel (781) 762-6477 • Fax (781) 769-1236  
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August 10, 2011

Town of Middleborough  
Bank Building  
20 Centre Street  
Middleborough, MA 02346

Attn: Allison J. Ferreira

Dear Allison:

This letter is written as a result of our meeting in your office on August 1, 2011.

Our intention is to spell out a potential course of action regarding the town records, the cost, and the benefits that you can expect.

In addition to a suggested approach, we have included some references and appropriate comments. We are so very proud of the quality of our work that we sincerely urge you to call some of our customers. You will get ringing endorsements from all of them!

We look forward to being of service to you.

Very truly yours,  
KING INFORMATION SYSTEMS, INC.

Paula R. Macdonald  
Account Representative

PRM/cb  
Attachments  
cc: Patricia M. Tighe  
President

## **GENERAL INFORMATION**

King Information Systems, Inc. has been in business since November of 1972. The founder of the company had worked (as a bank specialist) for another firm for eight years prior to that date.

Our focus over the past 37 years has been solving records management problems for banks and credit unions. It is only recently that we have begun to add to our customer base by calling on local town governments. We have had a number of successes and have found that town government recordkeeping problems are very similar to our bank customers' recordkeeping problems.

Our capabilities include the following:

1. Consulting - We can analyze records problems and offer solutions and recommendations.
2. Implementation - Our trained staff will set up new records systems or convert outdated methods to current and modern procedures.
3. Microfilm - Our laboratory is capable of doing any kind of microfilm work.
4. Equipment - We sell and service a complete line of mechanized files, fireproof containers of all types, standard steel vertical and lateral file cabinets, rotary file units, storage boxes and cartons, microfilm cameras, readers, reader-printers, scanners, etc.
5. Storage - We can provide off-site storage to satisfy all of your needs.
6. Supplies - We sell a total range of index guides, file folders, labels, "OUT" guides, document dividers, and other filing and finding aids.
7. Systems - We are totally conversant with the latest in color-coding, indexing, miniaturization, optical technology, *as well* as the various alphabetical, numerical, geographical, and subject methods of filing.

The most important attribute that we offer to our customers is “objectivity”. Because we are involved in all types of records control and filing systems, and because we can profit from all of them, we have *no* reason to recommend or suggest anything except what is right.

Our goal is to **solve** records problems for our customers.

## **RECOMMENDATION**

To get started on a Records Management project, a consulting approach should be used. Under this arrangement, our fee is \$495.00 per day, plus expenses. Based on the size of your office, the vault, and your archives, it is our estimate that two days would be required to thoroughly survey and analyze your various records. We estimate an additional three days to analyze the assessor's, the town manager's, and the additional old records that are not included in the town clerks archives. We will then formulate specific recommendations that would include the following:

1. A records inventory - the number of files, papers, cards, folders, etc.  
A total volume count would be provided.
2. Categorization of records by title.
3. Frequency of reference.
4. How references are made (alphabetically, numerically, geographically, etc.).
5. Where references originate (telephone request, mail, other departments, etc.).
6. Statutory requirements, directives, etc. We will consult with counsel, if necessary.
7. Feasibility of any updated techniques, such as microfilm or optical imaging.
8. If pertinent, suggestions on purging, new equipment, new supplies, procedural changes, filing system adjustments, personnel requirements, color-coding, etc. Price quotes would be included.
9. A detailed plan of action. Included would be timetables, how many people would be necessary, cost estimates, etc.

Needless to say, the consulting approach requires the cooperation and availability of your employees to answer our questions, show us around, and so on. The success of the project depends on such cooperation.

NOTE: After 30 days, any price changes that have taken place will become effective.



### **MODUS OPERANDI**

It should be stressed that a consulting fee in exchange for a detailed report and set of suggestions will **not** end our involvement. King Information Systems, Inc. is fully prepared to implement whatever decisions you make.

We will provide staff for physical interfiling of records; we will perform whatever conversions, moves, or installations that are selected. And most emphatically, we will provide any new equipment or supply items that become necessary.

Finally, but perhaps most importantly, we will *follow through* after the conversion to assist you with re-orders, expansions, modernization, training of new employees, etc.

## TOWN REFERENCES

1. Town of Kingston  
26 Evergreen Street  
Kingston, MA 02364  
Mary Lou Murzyn  
781-585-0500
2. Town of Wellesley  
525 Washington Street  
Wellesley, MA 02482  
Sandy Hobson/Laurie Lizak/Chris Connelly  
781-431-1019
3. Town of Plaistow  
145 Main Street  
Plaistow, NH 03865  
Nikki Carr  
603-382-8469
4. Town of Meredith  
41 Main Street  
Meredith, NH 03253  
Brenda Vittner  
603-279-4538
5. Town of Newbury  
937 Route 103  
Newbury, NH 03255  
Dennis Pavlicek  
603-763-4940
6. Town of Littleton  
125 Main Street  
Littleton, NH 03561  
Tony Mincu  
603-444-3996
7. East Greenwich Police Department  
175 First Ave.  
East Greenwich, RI 02818  
Thomas Coyle  
401-884-2244

8. Town of Hopkinton  
18 Main Street  
Hopkinton, MA 01748  
Geri Holland  
508-497-9700
9. East Bridgewater Public Schools  
11 Plymouth Street  
East Bridgewater, MA 02333  
Maureen Tucker  
508-378-5830
10. Town of Whitman  
53 South Avenue  
Whitman, MA 02382  
Pam Martin  
781-618-9710
11. Worcester Police Department Credit Union  
400 Grove Street  
Worcester, MA 01605  
Julie Holden  
508-752-1122
12. Hanscom Federal Credit Union  
Hanscom Air Force Base  
Bedford, MA 01730  
David Sprague  
781-274-6335
13. Lincoln Police Department  
100 Old River Road  
Lincoln, RI 02865  
Liz Gagnon  
401-333-8483
14. Town of Acushnet  
122 Main Street  
Acushnet, MA 02743  
Pam Labonte  
508-998-0215
15. Town of Eastham  
2500 State Highway  
Eastham, MA 02642  
Sue Ficher/Lillian Lamperti  
508-240-5919

16. The Steamship Authority  
One Railroad Avenue  
Woods Hole, MA 02543  
Robert B. Davis, Mark Anderson  
508-548-5011
17. Town of Easton  
136 Elm Street  
Easton, MA 02356  
Jeremy P. Gillis  
508-230-0530
18. Town of Hanson  
542 Liberty Street  
Hanson, MA 02341  
Sandra Harris  
781-293-2772
19. Town of Grafton  
30 Providence Road  
Grafton, MA 01519  
Maureen Clark/Nancy Hazen  
508-839-5335 x195
20. Town of Plymouth  
11 Lincoln Street  
Plymouth, MA 02360  
Laurence R. Pizer  
508-747-1620
21. Martha's Vineyard School District  
4 Pine Street  
Vineyard Haven, MA 02568  
Dr. James H. Weiss  
508-693-2009
22. Town of Merrimack  
6 Baboosic Lake Road  
Merrimack, NH 03054  
Evelyn Gillis  
603-424-3531
23. Town of West Tisbury  
1059 State Road  
West Tisbury, MA 02575  
Jen Rand/Kristina West  
508-696-0102 - 508-696-0101

24. City of Quincy  
1305 Hancock Street  
Quincy, MA 02171  
Joseph Shea  
617-376-1130
25. Town of Pembroke  
100 Center Street  
Pembroke, MA 02359  
Lisa Cullity  
781-709-1409
26. Swansea Public Schools  
One Gardners Neck Road  
Swansea, MA 02777  
Randi Arruda  
508-675-1197

**PROPOSED TIME LINE  
FOR  
HISTORIC AND VITAL RECORDS PRESERVATION PROJECT**

The proposed time line for the first phase of the Historic and Vital Records Preservation project would be as follows:

- 1) Include the first phase of the Historic and Vital Records Preservation project on the warrant as an article for the Fall Special Town Meeting in October of 2012;
- 2) Hire contracted vendor (pursuant to Massachusetts General Laws Chapter 30B) to conduct assessment in November or December of 2012 and provide a detailed analysis to the Town of Middleborough by February of 2013;
- 3) Application to be submitted to Community Preservation Committee in June of 2013 for phase two (2) of the Historic and Vital Records Preservation project to request the implementation of the phase one (1) assessment and to contract a vendor (pursuant to Massachusetts General Laws Chapter 30B) to analyze our current climate control system.
- 4) Application to be submitted to the Community Preservation Committee in June of 2014 to implement phase three (3) of the project including the archival, digitizing and microfilming of our historic and vital records and the repair to upgrade of the current climate control system.

EASTON, MASSACHUSETTS



OFFICE OF THE TOWN CLERK  
136 ELM STREET, EASTON MA 02356  
[www.easton.ma.us](http://www.easton.ma.us)  
508-230-0530



Jeremy P Gillis, CMC/CMMC Town Clerk  
Lucia Longhurst, Principal Clerk  
Teresa Wooding, Principal Clerk

July 2, 2012

To Whom It May Concern:

In 2008, King Information conducted both an audit, and organization of the Town of Easton's record storage area. They were professional, courteous and knowledgeable. Through their efforts they transformed a disorganized, catch all records storage area into a true Archives/Records management center that is clean, organized and searchable. I continue to use King for various Records Management projects and audits, and remain completely satisfied with their company.

I do not hesitate to recommend King Information for any municipal records management project, and wholeheartedly endorse their products and services.

Respectfully Yours

A handwritten signature in black ink that reads "Jeremy P. Gillis".

Jeremy P Gillis, CMC/CMMC  
Town Clerk of Easton

## Allison Ferreira

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**From:** Laurence Pizer <LPizer@townhall.plymouth.ma.us>  
**Sent:** Monday, July 02, 2012 10:45 AM  
**To:** Allison Ferreira  
**Subject:** King Info Systems

You asked about my experience with King Info Systems. The Town of Plymouth through its Town Clerk's Office hired King Info Systems for a two phased process. In year one, they evaluated our collections, which allowed them to present a proposal for work in culling the collections and organizing what remained. We were pleased with their proposal and hired them for phase two to perform necessary work. We had a certain sum of money available for the work, and King Info worked with us to use those funds most effectively. The staff that performed the work were excellent. They were knowledgeable, capable, and personable. We were very much impressed with the results. The software we purchased has allowed us to maintain and expand upon their work.

I can recommend King Info without reservation.

Laurence R. Pizer, Town Clerk  
11 Lincoln Street  
Plymouth, MA 02360  
508-747-1620  
[lpizer@townhall.plymouth.ma.us](mailto:lpizer@townhall.plymouth.ma.us)