New Hanover, Pennsylvania

DocStar®

Municipal Growth Fuels Move to Document Imaging

Company Facts

Overview
- Location: New Hanover
- Industry: Municipal Government
- Website: www.newhanover-pa.org

Success Highlights

Challenges
- On-site storage was at capacity, while off-site storage wasn't feasible
- Flurry of files for new property development projects required a storage solution

Solution
- DocStar® ECM

Benefits
- Fast, easy access to property records
- Integration with third-party software
- More accurate accounting information
- Simpler code and permit enforcement

If you look at a map of Eastern Pennsylvania, there's a triangle of cities—Philadelphia, Reading, and Allentown. Somewhere near the middle of that triangle is New Hanover. The 22-square-mile community is also right in the middle of some tremendous growth—growth that's causing it to change how it does business.

"Our population is at about 8,000, and growing strong," says Anne Klepfer, town manager. "We have more than 3,000 new housing units on the books; plans have been submitted to the planning commission, but they've not gotten through the system." Most of these proposed dwellings are single-family homes. But, of late, there've been applications for town homes, village homes and multi-family residential developments.

"This growth that New Hanover is facing is actually part of what led us to DocStar," Klepfer says. "Growth management issues." Besides the residential development, the town also has a couple of significant commercial projects in the works, as well as a town center project that will be built from the ground up on what has been about 80 acres of farmland.

"It is very exciting," Klepfer explains. "But we are just bogged down with paper. We've got subdivision plans in every nook and cranny of our municipal building, which is 30 years old. And we are running out of storage space." But town officials resisted the temptation to add more space.

"Two years ago, the Board of Supervisors was not inclined to build a new or bigger building, or to enlarge this one," she says. "So I, as manager, needed to find a way of controlling our records, and making them more accessible to the public."

Finding off-site storage was not a viable option. "You never know who will be walking through the door to make a public records request," she says. "It could be for a subdivision that's 20 years old, or it could be for other files that old. Plus, in the course of researching new projects, our staff often needs to pull out old projects. So offsite storage was not an option."

The space crunch hit the town at right about the same time other technology initiatives were gaining traction. "I started implementing a GIS program," Klepfer says. "And we got a grant from Pennsylvania's Department of Environmental Protection for the ESRI ArcView product." She showed the board of elected officials the benefits and administrative efficiencies gained from that product, a GIS and mapping software. With that success, she moved the technology needle a little further.

"Then we were introduced to DocStar, how record retrieval works with DocStar, and the potential for linking it to the GIS system," Klepfer says. "And everything started falling into place rather quickly." The township signed on with DocStar. Most recently, New Hanover incorporated what's called the ARMADA Portal, a proprietary creation of DocStar's partner ImageNet, which lets users leverage computer-mapping technology to perform location-based inquiries to the DocStar database.

"I use it every day," Klepfer says. "It's on my computer, and instead of having to go out to the front of the office and pull out huge tax maps, I can just put in the property owner's name or the street, and find information that way. The portal brings up all the possible property owners, and I can usually narrow it down from there. I just click and see what the lot looks like, where it's located, the road it's situated on and all of the neighboring properties. All the information is right at my desktop."

Going digital

Digital imaging and tying that to the GIS involved a handful of township employees, including Klepfer, a code enforcement officer and support staff. The way New Hanover set it up, a part-time clerk handled all of the scanning and coding for the first few years. Now

the part-time clerk is going full-time, in large part because of the growth the town is facing. According to Klepfer, the clerk will still manage scanning and coding during downtime in her other responsibilities. "We've also talked about having a summer intern come in and, at a much lower wage rate, do some of the scanning," she adds. The township regularly gets requests from some local college students and high school students looking for summer work. "That's definitely a possibility, but so far, we've just been doing it with our current staff," Klepfer adds.

Right now, New Hanover is taking a two-fold approach to getting its documents into the system. "I told my staff to go backwards with files when time permits," Klepfer says. "But we need to stay current with it." Staying current means more than just plans. Office suite documents—word processing files, for instance—also are being scanned in. While that may sound counter-intuitive, there's good reason to do so. "Even though DocStar lets you directly transfer Word documents, Excel, any documents, you won't get the signed version unless you physically scan them." That's particularly important when it comes to minutes, which are not official until they are signed.

The township also has made sure all of its code enforcement permits and violations are entered. Having an easily accessible record for each property comes in handy when performing follow-up or answering questions when the code enforcement officer is out on inspections.

The DocStar system is just part of what Klepfer calls "a technological explosion in New Hanover." The town is buying and implementing new code enforcement and building inspection software. According to Klepfer, the new software will be integrated with the entire GIS system, with DocStar and with the municipal accounting software.

"When a permit comes in, the system will calculate the fees," she says. "And when the check is paid, all the clerk has to do is enter

that it's paid. It will automatically get entered into our accounts receivable financial software, and the information for the permit will be accessible by clicking on the property or typing in the name or address." The information will actually populate into the forms automatically. "So we won't need to do any typing on the permits, other than to mark when the inspection occurred and if there were any problems," Klepfer adds. "It's all going to be very automated, which will cut back on secretarial time and building inspector's time, leaving them free to do more inspections."

Getting New Hanover up-to-speed with DocStar was made easier thanks to the work of ImageNet. "ImageNet is very knowledgeable and has been very attentive to us," says Klepfer, noting the varied perspectives each department has. In terms of training, it's hard. The finance department looks at things differently than the office manager and differently than the code enforcement officer. So the challenge really has been to get individualized training sessions to address their particular concerns. We were able to receive the specialized training at our own pace, which was important. We knew what we wanted, and ImageNet tailored the training to us."

She thinks the biggest challenge, perhaps, has been getting over some long-held notions. "I actually think the hardest thing for us is to get away from organizing everything in our heads in folders and subfolders," like traditional PC operating systems do, she notes. It's a fight against instinct, she says, to think in terms of a big, vast database. But it's a fight New Hanover staff members are winning.

Seeing the benefits

For Klepfer and her team, there is a lot about the DocStar system and integration that's positive. Code enforcement functionality tops the list, though. "The handiest tool right now for us is code enforcement," she says. "Clicking on a property also brings up the orthophotography that we have. So the code enforcement officer can look at whatever

they're applying for now, whatever new permit they're looking for, and see if there are any violations on the property noticeable from the aerial photography."

In addition, he can see whether other violation notices were issued in the past, perhaps by a previous code enforcement officer. He can also see if there have been any applications for zoning variances or special permissions granted that allow the property to be used in a way not normally allowed in the zone. "He has all of those things at his fingertips when he's processing an application or when he is trying to issue a citation," Klepfer says.

For the town supervisors, the benefits are even greater. Going with DocStar allowed the town to put off having to build a new building. "That was really what we started looking at," Klepfer says. "The electronic records management system was a way to help us free up some space. That was the impetus for it, but it has blossomed into a whole bunch of different uses and applications."

New Hanover has been using DocStar for more than a year, and has scanned in more than 10 years worth of minutes and agendas. This allows employees to do keyword searches and find out information on any board action. Also, if there has been correspondence that's directly linked to a particular parcel, it's

possible to just click on that parcel and find the documentation.

New Hanover is working through getting all of the building permits scanned in now. The extent of space benefits hasn't even been fully realized. "We have yet to get to the big stuff," she says, referring to the large plans submitted by developers working on subdivisions and other projects. "If you can imagine a 217-unit golf course residential community, it takes up two entire drawers of lateral files all by itself." That's because each project has several iterations of a full set of plans, from initial submission to final approval.

The township plans to scan in the original plans that are submitted, then scan in the preliminarily approved plans. "We'll only keep paper copies and Mylar copies of the final plans and the record plans," Klepfer explains. Actually, the township is reaping added benefits from its move to electronic record storage. "We're getting as-built plans in digital form now," she says. "So they're incorporated into the GIS system."

What DocStar already has allowed the township to do is begin clearing out file cabinets and tagging them for removal. "The records act in Pennsylvania allows us to maintain electronic records," she says. "We'll be able to get rid of all the old code enforcement files without losing anything." Word has it that the code enforcement officer—who Klepfer describes as a paper and

file cabinet kind of guy—after seeing how well the system works, is actually begging that the files be tossed.

The DocStar solution has allowed the township to discard paper records with confidence that electronic backup exists, and that security issues are addressed. No longer must they worry about whether records stored off-site are adequately protected, secure and confidential.

More in the works

The long-range plans in New Hanover include having all records available for emergency management purposes. "We live within 10 miles of a nuclear power generating plant," Klepfer says. "So we have a mandatory evacuation drill that we do and an evacuation plan that we have to follow. One of the goals is to be able to be out in the field and bring up blueprints for any school, for instance, if there's an issue there, and to be able to bring up maps of the township for detour routing, and so on."

In-house scanning of large documents will be the foundation of that work. "We just were notified by the state that we were getting a grant—a $25,000 grant—to purchase a large-format printer/scanner/copier," Klepfer says. "So we will be able to do that in-house, instead of shipping it out and paying for it."

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

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