

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title	
08040-0001	08040 - COUNTY CLERK RECORDS/0001 - ADMIN	1	Carasoft-Gimmal Records Management Software	

Budget Category, FINAL Recommendation and Comments		
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding	Comments (if any)
G-Not Supported	Not Recommended	FY 2027 base budget is sufficient to cover the annual maintenance. Will get entered on software maintenance log.

WHY is this request needed?
Annual fee for the County Clerk's records management software. The implementation of the records management database is in progress.

WHAT are you requesting?
Annual support and maintenance for Gimmal Records Management software.

MAINTENANCE/OPERATIONS EXPENSES (SUPPLIES, DUES, MAINTENANCE, ETC):				
Account Description	Details	Amount Requested	Budget Dept. Comments	FY 2027 Recommend Amount
1025-08040-0001-41-30-0000-637503-	Carahsoft-Gimmal Records Management-Annual support and maintenance	\$21,150.00	FY 2027 base budget is sufficient to cover this request. Just need to make sure it gets on SW maintenance list - but no additional dollars need to be adopted.	\$0.00
M&O Requested Subtotal:		\$21,150.00	Recommended M&O Subtotal:	
Total Estimated Department Request:		\$21,150.00	Updated Total Department Request:	
			RECOMMENDED Total Department Request Utilizing FY 2027 Funds:	\$0.00
			RECOMMENDED Total Department Request Utilizing FY 2026 Funds:	\$0.00

ANALYSIS					
Q & A Discussions with Department					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Brenda G.	3/23/2026	Email	3/23/2026	Brenda G.	Email
Questions TO Department The software maintenance line has \$72,386 allocated for FY 2027. I believe there is more than enough funds to cover the annual maintenance and support for Carasoft unless you intend to use this account line for anything else in FY 2027? If not, we can keep this request but I will be recommending \$0 as your FY 2027 budget allocation will have more than enough to cover this annual fee.			Response From Department Ok, sounds good.		

Q & A Discussions with IT					
Sent To:	Date Sent	Comment		Responder's Name	Comment
				Greg E.	
Questions to IT Please list on SW Maintenance log.			Response From IT The FY27 funds are set for the renewal to be as much as \$25000		

Q & A Discussions with Purchasing					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Questions to Purchasing Is this amount listed by IT sufficient (\$25,000)			Response From Purchasing Yes. Contract 2025-238, option year 3 is pre-negotiated to be \$23,112.63 HA		

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
08040-0001	08040 - COUNTY CLERK RECORDS/0001 - ADMIN	2	Kleio Kofile AI Document Repository		

Budget Category, FINAL Recommendation and Comments					
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding		Comments (if any)		
E-Workshop Discussion	Neutral		Discuss direction of AI use in the County during Budget Workshop.		

WHY is this request needed?

Currently, all historical and current documents are not available online for the public nor are the records readily searchable in their current form.
By moving these records to this new platform, the public will have access to all available documents and will be searchable using new AI-driven document intelligence and engagement that transforms preserved records into living civic assets.
Kleio-Kofile AI Repository is a comprehensive solution to preserve, organize and provide user-friendly public access to our historical and official records. Additionally, Kleio will provide an online reproduction of the preserved books, allowing users to access their contents digitally while safeguarding the original volumes from wear and deterioration.

WHAT are you requesting?

The County Clerk Office is requesting an AI-enabled document repository provided by Kofile Technologies. This solution intends to deploy a secure, government-compliant AI platform capable of:
Automatically ingesting electronic and scanned documents
Classifying document based on learned patterns
Extracting information within documents
Making handwritten documents, some undecipherable, available to the public
Paving the way for a single source repository for historical and public documents
Reduced staff workload for manual searches
Long term digital preservation of county records
Enhanced disaster recovery protection.

HOW will this benefit your office and/or the County?

Kleio will digitally preserve all record books. This will ensure long-term protection of fragile and historical documents. The platform will develop multiple organized collections allowing records to be grouped into clearly defined categories such as:
Deed Records
Probate Records
Court Records
Commissioners Court Minutes
Historical Archives
Each collection will be accessible online and searchable independently or collectively.
Kleio will improve public access by providing 24/7 access for customers and reduce in-person traffic and staff research time. Faster access and processing leads to higher citizen satisfaction and improved transparency.
AI automatically identifies document types (e.g., invoices, deeds, or permits) and applies appropriate metadata tags. This eliminates manual sorting and ensures consistent organization across thousands of files.
The platform can provide deep content insight into documents that has not been available to this point.
Kleio is a sole-source product and the only solution of its kind currently available on the market.

Is there statutory authority for this request?		Will this generate revenue?		If Yes, potential amount?	
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FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)										
Item Detailed Description	New / Replace	Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Neutral Quantity	FY 2027 Neutral Amount	Recommended FY 2026 Amount
Kleio Kofile AI Document Repository	New	1			\$0.00	\$132,000.00	Kleio Kofile AI Document Repository	1	\$132,000.00	\$0.00
Estimated Requested Equipment Subtotal:						\$0.00	Neutral Equipment Subtotal:		\$132,000.00	\$0.00
Total Estimated Department Request:						\$0.00	Updated Total Department Request:		\$132,000.00	
						NEUTRAL Total Department Request Utilizing FY 2027 Funds:		\$132,000.00		
						RECOMMENDED Total Department Request Utilizing FY 2026 Funds:		\$0.00		

ANALYSIS					
Q & A Discussions with Department					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Brenda G.	3/23/2026	Email	3/23/2026	Brenda G.	Email
Questions TO Department			Response From Department		
Would this be replacing another software (potential savings to the county/records fund)?			No		
Would this generate revenue?			This may be an option in the future.		
Will the clerks be scanning in current and historical documents into this new platform or will the vendor be doing this?			It is our understanding that we will be required to upload or provide the documentation for the Kleio site.		
How wil this impact the staff's current workload? Do they have the bandwidth to take on these additional duties?			As of right now, it's too early to tell. This is a new product that has never been used before, therefore, there may be a need for additional personnel in the future.		
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Brenda G.	5/14/2026	Email			
Questions TO Department			Response From Department		
When we sent the packet to IT they came back with this question. Are you able to answer it?					

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Q & A Discussions with IT					
Sent To:	Date Sent	Comment		Responder's Name	Comment
				Ben W.	
Questions to IT			Response From IT		
Would IT assist in the implementation of this new platform?			IT would assist to the extent needed. This would be assigned to the requested AI Program Manager to assist with implementation and governance.		
If yes, does IT have the bandwidth to work on this project?			Yes, provided we are granted the requested resources to oversee AI in the County.		
Does IT have any concerns about this request?			Is the AI model proprietary or is it using an off-the-shelf LLM, such as Anthropic or OpenAI? If not proprietary, what are the assurances that sensitive records, such as Court or Probate records, do not show up in external LLM chats?		
Anything else we may need to know about this request - or things to add for Purchasing to price?			None at this time.		
Q & A Discussions with Audit					
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment
Robert C.	5/28/2026		6/1/2026	Robert C	Email
Questions to Purchasing			Response From Purchasing		
Is this an allowable expense?			Management and preservation of records, including records management automation initiatives, are eligible expenditures of funds derived from fees collected under Texas Local Government Code §118.0216. Accordingly, this project constitutes an allowable expenditure from Fund 1025.		