

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS
OF SAN BERNARDINO COUNTY
AND RECORD OF ACTION**

March 11, 2025

FROM

PETE MENDOZA, Director, Purchasing Department

SUBJECT

Amendment to Contract with Vital Records Control, Inc. for Offsite Record/Data Storage and Retrieval Services

RECOMMENDATION(S)

Approve **Amendment No. 12 to Contract No. 12-677** with Vital Records Control, Inc. for offsite record/data storage and retrieval services, for an average annual cost of \$1,400,000, extending the contract term by approximately five years, for a total contract term of September 15, 2012, through July 1, 2030.

(Presenter: Pete Mendoza, Director, 387-2073)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES

Improve County Government Operations.

Operate in a Fiscally-Responsible and Business-Like Manner.

FINANCIAL IMPACT

Approval of this item will not result in the use of additional Discretionary General Funding (Net County Cost). The impact on each department's budget is based upon the need for services. Departments that require record/data storage and retrieval services are responsible for ensuring there is adequate funding in the respective budgets for the level of requested services. The estimated cost for the remainder of this contract is anticipated to be \$7,000,000.

BACKGROUND INFORMATION

The Purchasing Department (Purchasing) maintains a Countywide contract with Vital Records Control, Inc. (VRC) for offsite record/data storage and retrieval services, which will expire on March 14, 2025. Approval of the amendment will extend the contract with VRC for offsite record/data storage and retrieval services by approximately five years through July 1, 2030.

On September 11, 2012 (Item No. 41), the Board of Supervisors (Board) approved Contract No. 12-677 (Contract) with Storetrieve, LLC (Storetrieve) in the estimated amount of \$2,700,000 for the provision of offsite record/data storage and retrieval services, for the period of September 15, 2012, through September 14, 2017, with two one-year options to extend the term.

On November 6, 2012 (Item No. 56), the Board approved Amendment No. 1 to the Contract with Storetrieve, to change the method of payment for permanent withdrawal fees (as required in the new contract) assessed by the County's prior service provider.

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On December 18, 2012 (Item No. 74) the Board approved Amendment No. 2, to add additional service options, and to increase the total contract amount by \$255,000, for a new total contract amount of \$2,925,000, with no change to the contract term.

On February 14, 2017 (Item No. 48), the Board approved Amendment No. 3, to add additional services requested by County departments with no change to the total contract amount or contract term.

On August 15, 2017, pursuant to the authority delegated on September 11, 2012, the Purchasing Agent executed an extension of the contract term, which was approved as Amendment No 4, extending the term of the contract by one year from September 15, 2017, to September 15, 2018, with no change to the total contract amount.

On April 3, 2018 (Item No. 32), the Board approved Amendment No. 5 to the Contract, adding digital document scanning services and web-hosted storage, increasing the total contract amount by \$1,400,000 for a new total contract amount of \$4,325,000, and extending the term for one year, for a new total contract period of September 15, 2012, through September 15, 2019.

On August 6, 2019 (Item No. 36), the Board approved Amendment No. 6 to the Contract, extending the term by one additional year, with no change to the total contract amount of \$4,325,000, for a total contract period of September 15, 2012, through September 15, 2020, while a formal Request for Proposals (RFP) was conducted for document storage services.

On March 18, 2020, Purchasing released RFP No. AGENCY20-PURC-3757 as a joint solicitation with Riverside County. Before a new contract was awarded, departments experienced temporary office closures related to the COVID-19 pandemic and made changes to their operations, including utilizing more web-based information. As a result, on September 15, 2020 (Item No. 54), the Board approved Amendment No. 7 to the Contract, extending the term by one additional year, for a total contract period of September 15, 2012, through September 15, 2021, with no change to the total contract amount of \$4,325,000.

Due to the COVID-19 pandemic and changes in department needs, Purchasing was unable to make an accurate assessment of department needs prior to expiration of the Contract. In August 2021, Purchasing withdrew from the joint solicitation with Riverside County as Riverside County decided to remain with their current vendor for this service. On September 14, 2021 (Item No. 37), the Board approved Amendment No. 8 to the Contract, extending the term by one additional year, for a total contract period of September 15, 2012, through September 15, 2022, and no change to the total contract amount of \$4,325,000, to allow for the release of a new RFP and time to transition to a new vendor.

On May 4, 2022, Purchasing released RFP No. AGENCY22-PURC-4633 for Document Storage Services. On September 13, 2022 (Item No. 55), the Board approved Amendment No. 9 to the Contract, extending the term by one additional year, for a total contract period of September 15, 2012, through September 14, 2023, and no change to the total contract amount of \$4,325,000, to allow time to transition to a new vendor.

On September 23, 2022, VRC notified the County that it had completed its acquisition of Storetrieve and that it had assumed the County's existing contract with Storetrieve as of that date. On December 6, 2022 (Item No. 46), the Board approved Amendment No. 10 to the

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Contract, assigning the contract to Vital Records and changing the payee information, with no change to the total contract amount of \$4,325,000 or the contract term.

On September 26, 2023, (Item No. 55), the Board approved Amendment No. 11 to the Contract, extending the term by 18 months, for a total contract period of September 15, 2012, through March 14, 2025, and updating the contract cost from a total amount to an annual average cost of \$536,000, to allow additional time for a new vendor to be selected.

On October 22, 2024 (Item No. 43), as the result of a competitive procurement, the Board approved three-party Agreement No. 24-1004 with Corodata Records Management, Inc. (Corodata) and Konica Minolta Business Solutions USA, Inc. (Konica Minolta). The three-party agreement was issued for document storage, retrieval, and digitization services, in an amount not-to-exceed \$600,000 annually, for the initial term of October 22, 2024, through October 21, 2031, with three one-year options to extend the term at the same annual value.

Following the award of the three-party agreement, Purchasing met with VRC to discuss the terms of the transition. After negotiation, VRC confirmed they could only commit to moving 500 boxes per week. As the County currently has approximately 129,000 boxes in storage with VRC, the total transition from VRC to Corodata is estimated to take approximately five years. During the transition, Purchasing will encourage departments to review their offsite, managed inventory and request the destruction of any boxes that are no longer required to be kept on file. This will help alleviate the transition timeline and will decrease costs to the County as departments will not be paying for the transition of files that are no longer needed.

PROCUREMENT

Not applicable.

REVIEW BY OTHERS

This item has been reviewed by Purchasing (Ariel Gill, Supervising Buyer, 387-2070) on February 24, 2025; County Counsel, (Adam Ebright, Deputy County Counsel, 387-5455) on February 24, 2025; Finance (Kathleen Gonzalez, Administrative Analyst, 387-5412) on February 19, 2025; and County Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5423) on February 24, 2025.

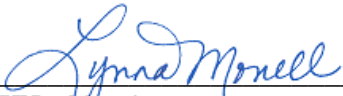
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Record of Action of the Board of Supervisors
San Bernardino County

APPROVED (CONSENT CALENDAR)

Moved: Curt Hagman Seconded: Joe Baca, Jr.
Ayes: Col. Paul Cook (Ret.), Jesse Armendarez, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY 
DATED: March 11, 2025



cc: Purchasing - Gill w/agree
 Contractor - c/o Purchasing w/agree
 File - w/agree
MBA 03/12/2025