

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

September 26, 2023

FROM

PETE MENDOZA, Interim 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. 11 to Contract No. 12-677** with Vital Records Control, Inc. for offsite record/data storage and retrieval services, for an average annual cost of \$536,000, extending the contract term by 18 months, for a total contract term of September 15, 2015, through March 14, 2025.

(Presenter: Pete Mendoza, Interim 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 annual spend for this contract is \$536,000 based on the average of the last three years.

BACKGROUND INFORMATION

The Purchasing Department (Purchasing) maintains a Countywide contract with Vital Records Control, Inc. (Vital Records) for offsite record/data storage and retrieval services, which will expire on September 14, 2023. Approval of Amendment No. 11 will extend the contract with Vital Records for offsite record/data storage and retrieval services, by 18 months, for a total contract period September 15, 2015, through March 14, 2024. Purchasing is currently negotiating a contract with the vendor recommended for award for this service. It is anticipated that a new contract will be executed by December 2024. Once a contract is awarded, Purchasing anticipates continued need of Vital Record's services for an additional 12 to 18 months due to the large number of boxes in storage with them and will allow for the transition of the services.

On September 11, 2012 (Item No. 41), the Board of Supervisors (Board) approved Contract No. 12-677 with 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. The Board and Purchasing,

**Amendment to Contract with Vital Records Control, Inc. for Offsite
Record/Data Storage and Retrieval Services
September 26, 2023**

pursuant to authority delegated to the Purchasing Agent, approved five amendments to the contract through 2018, updating the method of payment for the cost of permanent withdrawal fees, adding additional services requested by County departments, increasing the total contract amount to \$4,325,000, and extending the total contract term through September 15, 2019.

On August 6, 2019 (Item No. 36), the Board approved Amendment No. 6, extending the contract 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, extending the contract 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, extending the contract by one additional year, for a total contract period of September 15, 2012 through September 15, 2022, 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, extending the contract by one additional year, for a total contract period of September 15, 2012 through September 14, 2023, to allow time to transition to a new vendor.

On September 23, 2022, Vital Records 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 assign the contract to Vital Records and change the payee information.

PROCUREMENT

Not applicable.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Adam Ebright, Deputy County Counsel, 387-5455) on August 31, 2023; Finance (Ivan Ramirez, Administrative Analyst, 387-4883) on September 8, 2023; and Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5423) on September 11, 2023.

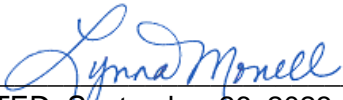
**Amendment to Contract with Vital Records Control, Inc. for Offsite
Record/Data Storage and Retrieval Services
September 26, 2023**

Record of Action of the Board of Supervisors
San Bernardino County

APPROVED (CONSENT CALENDAR)

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

Lynna Monell, CLERK OF THE BOARD

BY 
DATED: September 26, 2023



cc: Purchasing - Gill w/ agree
Contractor c/o Purchasing w/ agree
File w/ agree
JLL 10/12/2023