

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

May 18, 2021

**FROM**

**JASON ANDERSON, District Attorney**

**SUBJECT**

Amendment to Contract with Laguna Vault, LLC (dba Docu-Trust) for Document Storage Services

**RECOMMENDATION(S)**

1. Approve **Amendment No. 2 to Contract 16-632** with Laguna Vault, LLC (dba Docu-Trust) to provide records storage services increasing the contract by \$196,000 from \$390,000 to an amount not to exceed \$586,000 and extending the term for an additional three years, for a total contract term of eight years, from September 1, 2016 to August 31, 2024.
2. Authorize the Purchasing Agent to order any necessary changes or additions to the services being performed under the contract for a total not to exceed \$10,000, and to sign corresponding amendments with Laguna Vault, LLC (dba Docu-Trust).
3. Direct the District Attorney to transmit all documents related to this agreement, including any authorized amendments, to the Clerk of the Board of Supervisors within 30 days of execution.

(Presenter: Michael Fermin, Assistant District Attorney, 382-3662)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**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). Amendment No. 2 to Contract 16-632 with Laguna Vault, LLC (Docu-Trust) is a request not-to-exceed \$196,000, for a total contract authorized amount of \$586,000. The District Attorney's Office (Department) has spent \$291,429 since the beginning of the contract in September 2016. Amendment No. 2 includes an increase for fumigation services and additional storage racks to allow the Department to consolidate sensitive case files from a different location to the organized warehouse environment at Docu-Trust. The Department has negotiated current pricing for three more years without service interruption. Sufficient appropriation for document storage services will be included in the Department's 2021-22 recommended budget and future recommended budgets.

**BACKGROUND INFORMATION**

The Department currently stores approximately 15,000 boxes of sensitive and confidential case files with Docu-Trust at a local storage facility in San Bernardino. Some of these files must be stored indefinitely. The Department has five office locations and each office is responsible for coordinating their location's requests to store and retrieve boxes. Due to the number and

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May 18, 2021**

sensitive nature of the files, the Department must ensure they are indexed, stored, retrieved, and refiled accurately.

Continuing services with Docu-Trust will ensure continuity of operations, eliminate the transfer of thousands of boxes, and avoid the internal costs and staffing resources required to make significant changes to current storage practices. Docu-Trust is located in close proximity to the DA's Central Office in San Bernardino. The Central Office does more business with Docu-Trust than the other DA offices and this is advantageous for timely transportation and same-day services.

**PROCUREMENT**

On June 14, 2016 (Item No. 58), the Board of Supervisors (Board) authorized the Purchasing Agent to issue a purchase order to Docu-Trust, in the not-to-exceed amount of \$75,000, to provide file storage services for the period of September 1, 2015 through August 31, 2016. During this period, the Department reviewed and evaluated services of the existing countywide document storage vendor. To avoid significant termination fees and changes to storage practices, and ensure continuity of operations, it was determined that continuing to contract with Docu-Trust was in the Department's best interest.

On August 23, 2016 (Item No. 32), the Board approved Contract 16-632 with Docu-Trust, in the amount of \$234,000, which eliminated the termination fees, for the term of September 1, 2016 to August 31, 2019, with two additional one-year extensions. Per then existing County Policy 11-05, non-competitive contracts in excess of \$100,000 required Board approval.

On August 20, 2019 (Item No. 30), the Board approved Amendment No. 1 to Contract No. 16-632 with Docu-Trust, increasing the contract amount by an additional \$156,000, from \$234,000 to an amount not-to-exceed \$390,000, and exercising both one-year options to extend the term from September 1, 2019 to August 31, 2021.

The Department requests approval of Amendment No. 2 to Contract 16-632 with Docu-Trust, to extend the contract term by three years, from August 31, 2021 to August 31, 2024, in a not-to-exceed amount of \$586,000. The pricing schedule includes two new fees for fumigation services and additional storage racks to allow the Department to consolidate sensitive case files from a different location to the organized warehouse environment at Docu-Trust. Purchasing concurs with the non-competitive justification of continuing with the existing agreement.

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Katherine Hardy, Deputy County Counsel, 387-5437) on April 8, 2021; Purchasing Department (Leo Gomez, Purchasing Manager, 387-2063) on April 19, 2021; Finance (Monique Amis, Finance Analyst, 387-4883) on April 23, 2021; and County Finance and Administration (Kelly Welty, Deputy Executive Officer, 387-5423) on April 23, 2021.

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**APPROVED (CONSENT CALENDAR)**

Moved: Joe Baca, Jr. Seconded: Janice Rutherford

Ayes: Col. Paul Cook (Ret.), Janice Rutherford, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: May 18, 2021



cc: DA- Walker w/agree  
Contractor- C/O DA w/agree  
File- w/agree  
LA 05/25/2021