

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

September 13, 2022

FROM

PETE MENDOZA, Interim Director, Purchasing Department

SUBJECT

Amendment to Contract with Storetrieve, LLC for Offsite Record/Data Storage and Retrieval Services

RECOMMENDATION(S)

Approve **Amendment No. 9 to Contract No. 12-677** with Storetrieve, LLC, for offsite record/data storage and retrieval services, extending the contract term for one year from September 15, 2022, through September 14, 2023, for a total contract period of September 11, 2012, through September 14, 2023, with no increase to the total contract amount of \$4,325,000. (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 on need for services. Departments that require record/data storage and retrieval services are responsible for ensuring there is adequate funding in their 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 Storetrieve, LLC (Storetrieve), approved by the Board of Supervisors (Board) on September 14, 2021 (Item No. 37) for offsite record/data storage and retrieval services, which will expire on September 14, 2022. Approval of Amendment No. 9 to Contract No. 12-677 (Amendment) will ensure continuation of data storage and retrieval services for departments throughout the County and ensure there is sufficient time to transition to a new contracted vendor for this service, if necessary.

Purchasing released Request for Proposal (RFP) No. AGENCY22-PURC-4633 for Document Storage Services on May 4, 2022. The RFP is in the final stages of evaluation and will result in a new five-year contract for document storage services including the scanning and digital/disk storage of documents. This final contract extension is required to allow the County time to transition from Storetrieve to the newly awarded vendor, if necessary. The County currently has approximately 150,000 boxes of documents stored within Storetrieve facilities. It is estimated that a minimum of six months will be needed to complete the transition. This final Amendment will only be utilized for transitional needs to the newly awarded vendor. The

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existing agreement with Storetrieve includes termination for convenience, and this final amendment will be terminated once the County has completed the transition to the newly awarded vendor. It is anticipated that Purchasing will present the new contract to the Board for approval in October 2022 .

On September 11, 2012 (Item No. 41), the Board approved Contract No. 12-677 with Storetrieve in the not-to-exceed 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 15, 2017, with two one-year options to extend the term.

On November 6, 2012 (Item No. 56), the Board approved Amendment No. 1 to change the method of payment by Storetrieve for the cost of permanent withdrawal fees assessed by the County's prior service provider, with no net increase to the total contract amount.

On December 18, 2012 (Item No. 74), the Board approved Amendment No. 2, adding \$225,000 to the contract, increasing the total contract amount to \$2,925,000, with no change to the contract term to accommodate the increased demand by departments for document storage.

On February 14, 2017 (Item No. 48), the Board approved Amendment No. 3 to add additional services requested by County departments with no increase to the total contract amount or change to the contract term through September 15, 2017.

On August 15, 2017, pursuant to the authority delegated to the Purchasing Agent, the Purchasing Agent executed Amendment No. 4, extending the term of the contract by one additional year through September 15, 2018.

On April 3, 2018 (Item No. 32), the Board approved Amendment No. 5, increasing the total contract amount by \$1,400,000, from \$2,925,000 to \$4,325,000, and extending the contract through September 15, 2019.

On August 6, 2019 (Item No. 36), the Board approved Amendment No. 6, which extended the contract by an additional year through September 15, 2020, while a formal 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 caused by the COVID-19 pandemic and made changes to their operations, including utilizing more web-based information.

On September 15, 2020 (Item No. 54), the Board approved Amendment No. 7, extending the contract by an additional year through September 15, 2021. Due to the COVID-19 pandemic and changes in department needs, Purchasing was unable to make an accurate assessment of department needs prior to the expiration of the contract.

In August 2021, Purchasing withdrew from the joint solicitation with Riverside County. On September 15, 2021 (Item No. 37) the Board approved Amendment No. 8, extending the contract by an additional year through September 15, 2022, to allow for the release of a RFP and time to transition to a new vendor.

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PROCUREMENT

Purchasing initiated a formal RFP for records management services in September 2010, with the goal of consolidating document and media storage, indexing, and retrieval/destruction services across County departments to reduce costs. The resulting contract with Storetrieve was established to improve records management procedures, significantly reduce costs in various fee categories, and to eliminate permanent withdrawal fees after the initial four years of the contract.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (John Tubbs II, Deputy County Counsel, 387-5455) on August 11, 2022; Finance (Ivan Ramirez, Administrative Analyst, 387-4883) on August 15, 2022; and County Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5423) on August 28, 2022.

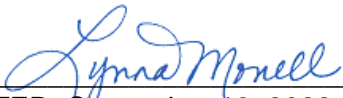
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Record of Action of the Board of Supervisors
San Bernardino County

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: September 13, 2022



cc: Purchasing - Younger w/agree
Contractor - C/O Purchasing w/agree
File - w/agree
CCM 09/21/2022