

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

**September 14, 2021**

**FROM**

**PATRICK SCALZITTI, Interim Director, Purchasing Department**

**SUBJECT**

**Amendment to Contract for Offsite Record/Data Storage and Retrieval Services**

**RECOMMENDATION(S)**

Approve **Amendment No. 8 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, 2021 through September 15, 2022, for a total contract period of September 11, 2012 through September 15, 2022, with no increase to the total contract amount of \$4,325,000. (Presenter: Patrick Scalzitti, Interim Director, 387-2074)

**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 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**

Approval of this item will ensure continuation of data storage and retrieval services for departments throughout the County.

On September 11, 2012 (Item No. 41), the Board of Supervisors (Board) approved Contract No. 12-677 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 15, 2017, plus 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.

**Amendment to Contract for Offsite Record/Data Storage and Retrieval  
Services  
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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 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, while a formal Request for Proposals (RFP) was conducted for document storage services through September 15, 2020.

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 to allow for the release of an RFP and time to transition to a new vendor. Due to the COVID-19 pandemic and changing Department needs, Purchasing was unable to make an accurate assessment of Department needs prior to expiration of the contract.

The contract is set to expire on September 15, 2021 but due to difficulties brought on by the COVID-19 pandemic, Purchasing recommends a one-year extension to allow time to re-examine the needs of the departments, award a new contract, and allow time to transition to a new vendor, if needed. Purchasing will meet with departments to discuss if requirements in the RFP released in March 2020 are still sufficient to meet their current needs. Additionally, Purchasing will explore offerings from vendors that will accommodate County staff working remotely. Once this information is compiled, Purchasing will then make a determination on how best to proceed based on the information received from departments.

**PROCUREMENT**

The Purchasing Department initiated a formal Request for Proposal for records management services in September 2010, with the goal of consolidating document and media storage, indexing, and retrieval/destruction services across County departments in order 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, Deputy County Counsel, 387-5436) on August 20, 2021; Finance (Joon Cho, Administrative Analyst, 387-4883) on August 25, 2021; and County Finance and Administration (Valerie Clay, Deputy Executive Officer, 387-3076) on August 25, 2021.

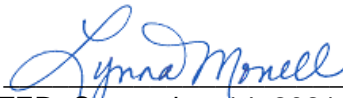
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Record of Action of the Board of Supervisors  
San Bernardino County

**APPROVED (CONSENT CALENDAR)**

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

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: September 14, 2021



cc: Purchasing - Churchill w/agree  
Contractor - C/O Purchasing w/agree  
File - w/agree  
CCM 09/23/2021