



TO: Board of Contracts and Awards

FROM: Kathy Katterhagen, Procurement and Payables Division, Finance Department kk
Wendy Fowler, Records Management Supervisor, City Attorney’s Office

COPY: City Council, City Manager, City Clerk, SBE Coordinator, LEAP Coordinator, and
Richelle Krienke, Finance/Purchasing

SUBJECT: Professional records storage and secure destruction services
Request for Proposals Specification No. CT14-0119F – July 1, 2014

DATE: June 5, 2014

SUMMARY:

The Finance Department, Procurement and Payables Division recommends a contract be awarded to Recall Total Information Management, Inc./Recall Secure Destruction Services, Inc., Tacoma, WA, in the amount of \$505,000, plus sales tax, budgeted from various departmental funds, for Citywide professional records storage and secure destruction services, for an initial contract term of five years, with the option to renew for two additional one-year terms, for a projected contract amount of \$700,000, plus sales tax.

STRATEGIC POLICY PRIORITY:

Ensuring secure storage and destruction of the City’s records supports the City Council’s strategic policy priority of encouraging and promoting an open, effective, results-oriented organization and is done in connection with the laws governing records management, RCW 40.14.

BACKGROUND:

ISSUE: The City of Tacoma must comply with RCW 40.14, the Preservation and Destruction of Public Records, and must retain and destroy records in accordance with minimum standards as set by state and federal retention schedules, and other retention requirements as may be contractually agreed upon or mandated by grants. The City’s records exist in paper and electronic form and contain both public information and information with legal exemptions from public disclosure, as set by the Public Records Act, RCW 42.56. Secure storage and destruction services are necessary to both retain the records for the mandated retention period and to protect the City’s confidential information at the time of destruction.

The proposed contract is to store paper records that are not actively used or referenced, or which are historical or long-term and need the temperature-controlled environment provided by a professional records storage company to ensure long-term preservation. These records are stored until they have met their legal retention period and become eligible for destruction or transfer to Washington State Archives. All of the City’s records will be stored in Recall’s facility at South 23rd and G Streets in Tacoma. Electronic records are retained in the City’s servers and databases and are not intended to be printed and stored offsite.

Storage costs for the initial term are estimated at \$122,000 for Tacoma Public Utilities and \$328,000 for General Government departments based on the volume of records. Secure destruction costs for the initial term are estimated at \$27,000 for Tacoma Public Utilities and \$28,000 for General Government departments.



Currently the City stores approximately 19,000 cartons offsite, at least 3,500 of which will be eligible for destruction or transfer to Washington State Archives by 2016. Coupled with continued records management training and the trend of conducting business processes electronically, staff anticipates there will be a further reduction in the number of cartons stored offsite. The City has reduced the number of new cartons added to offsite storage by approximately 50 percent since 2008.

ALTERNATIVES: There are no practical alternatives to off-site storage for the City’s inactive paper records. Off-site storage is the lowest cost option to comply with state law.

COMPETITIVE SOLICITATION: Request for Proposals Specification No. CT14-0119F was opened April 8, 2014. Six companies were invited to bid in addition to normal advertising of the project. Four submittals were received. Companies were able to submit for professional storage services, secure destruction services, or both. Three submittals were for both services, one submittal was for secure destruction services only. Scoring criteria were fees and charges, technology, qualifications and experience, and sustainability efforts.

<u>Respondent</u>	<u>Location</u>	<u>Rank</u>
Recall Total Information Management, Inc. Recall Secure Destruction Services, Inc.	Tacoma, WA	1
Iron Mountain Information Management LLC	Kent, WA	2
Record Xpress of California LLC (Access)	Fife, WA	3
White Dog Shredding Company dba ProShred Seattle	Tukwila, WA	4

CONTRACT HISTORY: New contract.

SUSTAINABILITY: Scoring for sustainability practices constituted ten percent of the overall rank for each submittal. The Selection Advisory Committee considered each submittal’s efforts to be sustainable in terms of vehicles, operations, fuel use and distance of travel to service all facilities, and recycling efforts of shredding by-product and contamination of paper with non-paper disposal. Each company was also asked to provide information on any internal policies relative to sustainability efforts.

SBE/LEAP COMPLIANCE: Not applicable.



RECOMMENDATION:

The City Attorney’s Office recommends a contract be awarded to Recall Total Information Management and Recall Secure Destruction Services for Citywide professional records storage and secure destruction services.

FISCAL IMPACT:

EXPENDITURES:

FUND NUMBER & FUND NAME *	COST OBJECT (CC/WBS/ORDER)	COST ELEMENT	TOTAL AMOUNT
Various departmental funds		5330100	\$700,000
TOTAL			

* General Fund: Include Department

REVENUES: N/A

FUNDING SOURCE	COST OBJECT (CC/WBS/ORDER)	COST ELEMENT	TOTAL AMOUNT
TOTAL			

FISCAL IMPACT TO CURRENT BIENNIAL BUDGET: \$40,000

ARE THE EXPENDITURES AND REVENUES PLANNED AND BUDGETED? Yes

IF EXPENSE IS NOT BUDGETED, PLEASE EXPLAIN HOW THEY ARE TO BE COVERED.

This is an ongoing contract for services. 2014 expenses are budgeted for in the current biennium. Service levels for 2015 through 2019 are subject to the funding amounts approved in future biennial budgets.

