



COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Human Resources



Date: August 26, 2015

Board Meeting Date: September 22, 2015

Special Notice / Hearing: None

Vote Required: Majority

To: Honorable Board of Supervisors

From: Donna Vaillancourt, Human Resources Director
Scott Johnson, Deputy Director, Human Resources

Subject: Agreement with Corodata for Offsite Document Management Services

RECOMMENDATION:

Adopt a resolution authorizing an agreement with Corodata to provide document storage and destruction services for the term of September 1, 2015, through August 31, 2020, not to exceed \$900,000.

BACKGROUND:

The County has many document storage and destruction needs given both the large number of documents created by County departments and the requirements of the County's document retention schedules for each department. Such services have been provided by Corodata since 2008. At that time, the County had transitioned the physical storage of paper documents from an internal, County-based Central Records Center to Corodata. In 2008, the County had just over 27,000 file boxes in storage; today the County has over 65,000.

DISCUSSION:

Document storage, by its nature, is a long-term service that the County requires in order to fulfill its legal and departmental records retention policies. Changing vendors frequently can result in incurring unnecessary fees to transport stored documents between vendors, and the County benefits from having a consistent document storage vendor over time.

Corodata is an SSAE 16-certified service provider that complies with HIPAA standards for handling confidential personal health information.

Corodata has continued to offer high quality services at competitive prices. The relocation of County documents currently in storage to a new vendor's facility would

result in over \$200,000 in service costs and would result in significant disruption to departments countywide. Logistically, the transfer of 65,000 file boxes from one storage facility to another would take upwards of 14 months to complete.

By continuing with Corodata, the County will prevent disruption of service, receive 6 months of free storage, and receive a reduced rate of \$0.155/30 days for the remainder of the contract. For these reasons, we recommend that the Board waive the RFP process.

The resolution contains the County's standard provisions allowing amendments of the County's fiscal obligations by a maximum of \$25,000 (in aggregate).

The resolution and agreement have been reviewed and approved by County Counsel as to form.

This resolution supports Vision 2025 Collaborative Community in promoting fiscal accountability by enabling countywide staff to access document management services in a legally-compliant and secure manner.

PERFORMANCE MEASURE(S):

Measure	FY 2015-16 Projected	FY 2016-17 Projected
Reduction in expense	\$75,000	\$3,600

FISCAL IMPACT:

The term of the agreement is September 1, 2015 through August 31, 2020. The County is expected to spend approximately \$180,000 per year (or a total \$900,000 over the five-year term of the agreement) in document management services.

Funds are included in departmental budgets for the current fiscal year and will be included in future year's budget requests. The savings from remaining with Corodata is estimated to be \$91,200 over the life of the contract.