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"Trusted Partner and Provider of Choice"

September 16, 2021

ADDENDUM NUMBER FOUR REQUEST FOR STATEMENT OF QUALIFICATIONS (RFSQ) # 104542 FOR DOCUMENT STORAGE SERVICES MASTER AGREEMENT

Addendum Number Four is issued to provide revisions to RFSQ #104542. Revisions are as follows:

1. In RFSQ, Section **1.1 Scope of Work**, add the following category:

III. Document Scanning

2. In RFSQ, Section **1.4 Vendors Minimum Qualifications**, Sub-paragraph 1.4.1 is deleted in its entirety and replaced with the following:

1.4.1 Vendor must demonstrate five (5) years' experience, within the last five (5) years providing Document Storage Services, Document Scanning, or services equivalent or similar to the services as outlined in the Appendix B – Sample Master Agreement, Exhibit A - Statement of Work (SOW).

3. In RFSQ, Section **1.5 Master Agreement Process**, add the following:

1.5.7 If the Master Agreement includes various categories of services, only those Contractors qualified for the specific category will be contacted to submit bids.

4. Under Section **1.8 Contact with County Personnel**, delete in its entirety and replace with the following:

Any contact regarding this RFSQ or any matter relating thereto must be in writing and e-mailed to **Carlos Rubio** at crubio@isd.lacounty.gov.

If it is discovered that a Vendor contacted and received information from any County personnel, other than the person specified above, regarding this solicitation, County, in its sole determination, may disqualify their SOQ from further consideration.

5. Under Section **1.33 Notification to County of Pending Acquisitions/Mergers by Proposing Company**, delete in its entirety and replace with the following:

The Vendor shall notify the County of any pending acquisitions/mergers of its company unless otherwise legally prohibited from doing so. If the Vendor is restricted from legally notifying the County of pending acquisitions/mergers, then it should notify the County of the actual acquisitions/mergers as soon as the law allows and provide to the County the legal framework that restricted it from notifying the County prior to the actual acquisitions/mergers. This information shall be provided by the Vendor on Required Form - Exhibit 1 - Vendor's Organization Questionnaire/Affidavit and CBE Information. Failure of the Vendor to provide this information may eliminate its SOQ from any further consideration.

6. In RFSQ, Section **1.38 Disabled Veteran Business Enterprise (DVBE) Preference Program**, Sub-paragraph 1.38.4 is deleted in its entirety and replaced with the following:

1.38.4 Information about the State's DVBE certification regulations is found in the California Code of Regulations, Title 2, Subchapter 8, Section 1896 et seq., and is also available on the California Department of General Services Office of Disabled Veteran Business Certification and Resources Website at <https://caleprocure.ca.gov/pages/sbdvbe-index.aspx>

7. In RFSQ, Section **1.38 Disabled Veteran Business Enterprise (DVBE) Preference Program**, Sub-paragraph 1.38.5 is deleted in its entirety and replaced with the following

1.38.5 Information on the Department of Veteran Affairs SDVOSB certification regulations is found in the Code of Federal Regulations, 38CFR 74 and is also available on the Department of Veterans Affairs Website at: <https://www.va.gov/osdbu/>.

8. In RFSQ, add the following Sections and Sub-Sections:

1.41 Default Method of Payment: Direct Deposit or Electronic Funds Transfer

1.41.1 The County, at its sole discretion, has determined that the most efficient and secure default form of payment for goods and/or services provided under an agreement/contract with the County shall be Electronic Funds Transfer (EFT) or direct deposit, unless an alternative method of payment is deemed appropriate by the Auditor-Controller (A-C).

1.41.2 Upon contract award or at the request of the A-C and/or the contracting department, the Contractor shall submit a direct deposit authorization request with banking and vendor information, and any other information that the A-C determines

is reasonably necessary to process the payment and comply with all accounting, record keeping, and tax reporting requirements.

1.41.3 Any provision of law, grant, or funding agreement requiring a specific form or method of payment other than EFT or direct deposit shall supersede this requirement with respect to those payments.

1.41.4 Upon contract award or at any time during the duration of the agreement/ contract, a Contractor may submit a written request for an exemption to this requirement. The A-C, in consultation with the contracting department(s), shall decide whether to approve exemption requests.

1.42 Vendors Acknowledgement of County's Commitment to Fair Chance Employment Hiring Practices

On May 29, 2018, the Los Angeles County Board of Supervisors approved a Fair Chance Employment Policy in an effort to remove job barriers for individuals with criminal records. The policy requires businesses that contract with the County to comply with fair chance employment hiring practices set forth in California Government Code Section 12952, Employment Discrimination: Conviction History (Section 12952).

Contractors are required to complete Exhibit 15 (Compliance with Fair Chance Employment Hiring Practices Certification) in Appendix A (Required Forms), certifying that they are in full compliance with Section 12952, as indicated in the Master Agreement. Further, contractors are required to comply with the requirements under Section 12952 for the term of any contract awarded pursuant to this solicitation.

1.43 Prohibition from Participation in Future Solicitation(s)

A Proposer, or a Contractor or its subsidiary or Subcontractor ("Proposer/Contractor"), is prohibited from submitting a bid or proposal in a County solicitation if the Proposer/Contractor has provided advice or consultation for the solicitation. A Proposer/Contractor is also prohibited from submitting a bid or proposal in a County solicitation if the Proposer/Contractor has developed or prepared any of the solicitation materials on behalf of the County. A violation of this provision shall result in the disqualification of the Contractor/Proposer from participation in the County solicitation or the termination or cancellation of any resultant County contract.

9. In RFSQ Section **2.5 Vendor's Questions**, update contact information with the following:

Carlos Rubio, Contracts Analyst
1100 N. Eastern Ave.
Los Angeles, CA 90063
E-mail address: crubio@isd.lacounty.gov

10. In RFSQ Section **2.7 Preparation and Format of the SOQ**, add the following:

▪ **Proof of Licenses (Section D)**

11. In RFSQ Section **2.7 Preparation and Format of the SOQ**, add the following Subparagraph:

2.7.5 Proof of Licenses (Section D)

Vendor must furnish a copy of all applicable licenses.

12. Under RFSQ Section **2.8 SOQ Submission**, delete in its entirety and replace with the following:

The SOQ shall be submitted by electronic mail (e-mail) with Subject Line bearing the words:

“SOQ FOR DOCUMENT STORAGE SERVICES”

The SOQ and any related information shall be sent via e-mail to:

Crubio@isd.lacounty.gov

It is the sole responsibility of the submitting Vendor to ensure that its SOQ is received before the submission deadline identified in paragraph 2.3 if submitting for initial SOQ consideration. This is an open and continuous solicitation and vendors can submit an SOQ at any time while the solicitation is active. Submitting Vendors shall bear all risks associated with delays in delivery by any person or entity, including the U.S. Mail. SOQ submissions will only be accepted by email.

13. In RFSQ Section **3.0 SOQ REVIEW/SELECTION/QUALIFICATION PROCESS**, add the following Subparagraph:

3.1.5 Proof of Licenses (Section D)

County will review Vendor's licenses in accordance with subparagraph 2.7.5 – Section D: Licenses.

14. Refer to Appendix B, Sample Master Agreement, Exhibit A – Statement of Work. In Section **14.0 SPECIFIC CATEGORIES AND ADDITIONAL REQUIREMENTS**, add the following:

14.3 Category III: Document Scanning

14.3.1 Scanning

- Each document and/or image must be scanned and saved as a searchable pdf file in bi-tonal black and white or color (when applicable) with a minimum resolution of 300 dpi.
- Each binder, manila folder, document set bound by a binder, clip, or rubber band, must be scanned into a single searchable pdf file or multiple pdf files and indexed as per the County customer's request in writing.
- All documents must be reviewed for:
 - Image quality and document breaks
 - Images with folded documents
 - De-speckling and de-skewing of images
- All rejected images must be re-scanned to material compliance.

14.3.2 Reassembly and Disposition

- Contractor must reassemble all documents into the binders or file folders in the original order and in the the same condition as received, pending customer review and approval of the pdf files. This is to ensure that documents are still available if it needs to be rescanned. (Note: Documents do not need to be re-clipped, reassembled with rubber band, or re-stapled, unless customer indicates otherwise.)
- Contractor will hold the inventory, up to 90 days or as long as requested by customer, until the images are confirmed acceptable by customer.
- Once the customer has confirmed that the images are acceptable, then the contractor will shred the inventory related to the image(s) that are confirmed acceptable and submit a certification of document destruction. Documents that are requested to be returned to the customer will be shipped back to the customer specified address at an additional fee, approved by the customer.
- The process of scanning, review, confirmation of acceptance of scanned images by customer, and shredding may be done on a flow basis for a reasonable period of time until the customer's entire inventory has gone through the process but shall meet the customer's completion date from each inventory pick-up date.

14.3.3 Deliverable

- Contractor shall deliver documents/images on an encrypted external Hard Drive or Universal Serial Bus (USB), as requested in writing by customer.

14.3.4 Services Coordination

- County will designate an authorized representative to serve as the primary point of contact for communication, issue escalation, contract administration, and project scope and change administration.
- Contractor will designate a representative to serve as the primary point of contact for customer communication, issue escalation, contract administration, and project scope and change administration.
- Contractor shall provide advance notice and schedule an appointment whenever a site visit is necessary.

15 In the RFSQ, **Exhibit 14** to the Required Forms is deleted in its entirety and replaced with Attachment 1 to this Addendum 4.

The updated RFSQ will be posted via the County's website at: <http://camisvr.co.la.ca.us/lacobids/>. All other terms and conditions of RFSQ #104542 remain in effect.

REQUIRED FORMS - EXHIBIT 14

DOCUMENT STORAGE SERVICES MASTER AGREEMENT STATEMENT OF QUALIFICATION SUBMITTAL FORM

This serves as an application for the Document Storage Services Master Agreement.

To Complete the Statement of Qualification:

1. Check off/fill out all the requirements met and sign form.
 - Minimum Qualifications (applies to all vendors)
 - Category Specific Qualifications (only complete sections in categories you intend to apply for)
2. Attach all applicable documents listed in Required Forms section.
3. Attach copies of the licenses/certificates/proof registrations checked off in specific categories.
4. Vendor acknowledges and certifies that it meets the Minimum Qualifications listed in Paragraph 1.4 - Minimum Qualifications, and the applicable requirements of Paragraph 2.7.2 – Vendor's Qualifications of this Request for Statement of Qualifications (RFSQ).

COUNTY USE ONLY

VENDOR NAME		AGREEMENT #
DATE RECEIVED	ANALYST	

1.4 MINIMUM QUALIFICATIONS

APPLICATION CATEGORIES (check all that apply)	YEARS PERFORMING SERVICE (within the last 5 years)
☐ Category I Paper Records	_____ yrs
☐ Category II Vault Storage – Special	_____ yrs
☐ Category III Document Scanning	_____ yrs

INSURANCE REQUIREMENTS (for all vendors)	County Use Only
GENERAL LIABILITY	
General Aggregate: \$2,000,000	☐
Products/Completed Operations Aggregate: \$1,000,000	☐
Personal and Advertising Injury: \$1,000,000	☐
Each Occurrence: \$1,000,000	☐
AUTO LIABILITY	
Auto Liability: \$1,000,000	☐
WORKERS' COMPENSATION	
Each Accident: \$1,000,000	☐
Disease – Policy Limit: \$1,000,000	☐
Disease – Each Employee: \$1,000,000	☐
WAREHOUSE OPERATIONS LEGAL LIABILITY	
Deductible: \$5,000 Maximum	☐
Limits: \$10,000,000	☐
MOTOR TRUCK CARGO	
Deductible: \$5,000 Maximum	☐
Limits: \$10,000,000	☐

REQUIRED FORMS

APPENDIX C		County Use Only
Exhibit 1: Vendor's Organization Questionnaire/Affidavit and CBE Information	☐	☐
Exhibit 2: Certification of No Conflict of Interest	☐	☐
Exhibit 3: Vendor's EEO Certification	☐	☐
Exhibit 4: Request for Preference Consideration	☐	☐
Exhibit 5: Familiarity with the County Lobbyist Ordinance Certification	☐	☐
Exhibit 6: Prospective Contractor References	☐	☐
Exhibit 7: Prospective Contractor List of Contracts	☐	☐
Exhibit 8: Prospective Contractor List of Terminated Contracts	☐	☐
Exhibit 9: Attestation of Willingness to Consider GAIN/GROW Participants	☐	☐
Exhibit 10: County of Los Angeles Contractor Employee Jury Service Program Certification Form and Application for Exception	☐	☐
Exhibit 11: Charitable Contributions Certification	☐	☐
Exhibit 12: Certification of Compliance with the County's Defaulted Property Tax Reduction Program	☐	☐
Exhibit 13: Zero Tolerance Policy on Human Trafficking Certification	☐	☐
Exhibit 14: Statement of Qualification Submittal Form	☐	☐
VENDOR SUPPLIED		
Certificate of Good Standing (if Corporation or LLC)	☐	☐
Statement of Information (if Corporation or LLC)	☐	☐
Certificate of Limited Partnership or Application for Registration of Foreign Limited Partnership (if Limited Partnership)	☐	☐
Statement of Pending Litigation	☐	☐
ACORD Certificate of Insurance	☐	☐
LA County named additional insured	☐	☐
All applicable licenses, certificates & proof of registration attached	☐	☐

APPLICANT ACKNOWLEDGES THAT IF ANY FALSE, MISLEADING, INCOMPLETE, OR DECEPTIVELY UNRESPONSIVE STATEMENTS IN CONNECTION WITH THIS SOQ ARE MADE, THE SOQ MAY BE REJECTED. THE EVALUATION AND DETERMINATION IN THIS AREA SHALL BE AT THE DIRECTOR'S SOLE JUDGMENT AND HIS/HER JUDGMENT SHALL BE FINAL.

I DECALARE UNDER PENALTY OF PERJURY THAT ALL OF THE ABOVE INFORMATION IS TRUE AND CORRECT.

PREPARER'S SIGNATURE		DATE
PRINT PREPARER'S NAME	TITLE	
ADDRESS	CITY, STATE	