

Attachment E: Questions & Responses

Offsite Document Storage, Shredding and Scanning Services

The following questions have been asked regarding this posted RFP:

1. What are the fees associated with closing your current document storage accounts?

We are estimating a cost of \$74k for the permanent removal of all boxes in San Francisco and approximately \$130k in Los Angeles.

2. Who will incur the fees associated with closing the account with your current vendors?

The State Bar is contractually bound to pay the incumbent contract fees for permanent removal of all boxes for relocation to a new facility. However, bidders may elect to offer to include an amount at contract award to mitigate this expense. All fees incurred to leave in 2019 as well as 2025 will be calculated during the bid scoring to project full 5-years costs.

3. Can we partner with a local vendor (subcontractor) in the San Francisco area so that we can bid for both locations?

Yes, you may elect to partner with another location, or elect to bid on only a single location.

4. What type of media is the State Bar storing in data storage containers? DLTs, LTOs, Reels, DVDs, VHS, etc?

Data cartridges only, multiple brands, 1.6 to 6.25 TB each, with a count of 15-20 per week.

5. Will bates numbering be used? If so, are there any requirements using bates numbering?

No and no.

6. How many pages (or what percentage of the pages) are considered envelopes and other evidence, various size?

It is difficult to provide a percentage, but it is very low and resembles the sample case files shown during the pre-bid meeting tour of the Chief Trial Counsel's filing rooms.

7. Can we only fill out the scanning portion of attachment A2 or do we need to do complete both?

You may elect to submit A1-LA, A1-SF, A2 individually or all of them depending on which services and service locations you are submitting a proposal for.

8. Will the case files include bar codes at the time of scanning?

No.

9. Is there a requirement to prioritize or rush a folder or record? If so, with is the service level agreement?

The scanning scheduling will be planned around the case prioritization, so we will not require a rush scanning service by file or record, at this time.

10. How are the indexed field organized? Is there a primary field that we can capture and utilized look up tables to gather the other indexes?

The primary field for all case files is the case number. We can provide a table generated from our AS400 archival database to aid in this look up function.

11. Would you consider a quote for scanning if we cannot attend your mandatory conference?

No. We had multiple attendees representing 9 competing vendors attend the pre-bid conference and are confident that we have an ample pool of interested parties. The conference included a walking tour of the building facilities and inspect of case files needing to be scanned.

12. Can companies from outside USA apply for this?

No. Due to security and confidentiality concerns we prefer a local presence.

13. Do we need to visit the State Bar for meetings?

On occasion, yes.

14. Can we perform the tasks outside USA?

No.

15. Can we submit the proposals via email?

Not exclusively, no. Please follow the submission instructions contained in the RFP post.

16. Can you share the quantity of open, active cases that would be part of this project?

The current open case equivalent total box count is 1,615 which we estimate to be 4.5M individual pages. The current open case count is approximately 1,100 in San Francisco and 7,488 in Los Angeles.

17. Can you provide a file/data format for Odyssey?

We need for all the scanned images to be in PDF format and (OCR) searchable. We've broken out both on cost attachment A2 for comparison. The index data can utilize a Case Number (e.g. 17-O-01134), Document Name, and Document Type.

18. Can Odyssey accept a bulk file import?

We are confirming this with the software provider, but remain open to any other utilities a bidder wishes to propose at this time for this same functionality.

19. Confirm the available space for onsite work and what hours/days it is open for us to do work?

We have yet to identify the actual location onsite for this work yet, but you should include your space requirements in your proposal. Regular hours are 8:00 am to 5:00 pm, but after-hours access can be provided through security, including potentially weekends. This will need to be negotiated with the record custodians for each discipline area.

20. Will we be in one location for the entire project or will we have to move around?

A single location will be designated.

21. Will we be responsible for pulling files and bringing those to the scanning area or will your staff handle that?

The OCTC files (bulk of the scan work) will be staged by State Bar staff in the file rooms as discussed during the tour. The vendor will need to move them to the scanning location within the building and returned to this same location (LA: floors 3 and 4 and SF: floor 7—see maps).

22. If onsite work is done the digital files will need to be transferred to our own facility on a secure/encrypted hard-drive for indexing and processing. Would this process be acceptable?

We will require contractual protections to ensure our existing confidentiality rules are honored, which may require a separate NDA to address the transfer of any data offsite for processing. Please identify suggested procedures in your proposal.

23. Which Attachment should be used to bid for the storage and shredding portion of this RFP?

Storage bids should be submitted on A1-LA, A1-SF or both. Shredding bids should be submitted on A2.

24. Can we submit the bid electronically by the due day (29th) and overnight the physical response after the 29th?

Yes, we will accept the email submission in advance of the hard-copies that may follow.