

**CONSULTANT AGREEMENT
CITY OF SANTA ANA**

THIS AGREEMENT is made and entered into on this 1st day of January, 2024 by and between Iron Mountain Information Management, LLC, (“Consultant”), the Housing Authority of the City of Santa Ana, a public body, corporate and politic, and the City of Santa Ana, a charter city and municipal corporation organized and existing under the Constitution and laws of the State of California (hereinafter collectively referred to as the “City”). City and Consultant shall hereinafter be referred to as collectively, “the Parties.”

RECITALS

- A. On July 19, 2023, the City issued a Request for Proposal No. 23-109A (“RFP 23-109A”), by which it sought qualified consultants to provide special skills and knowledge in the field of document storage and imaging services.
- B. Consultant submitted a responsive proposal that was selected by the City. Consultant represents that Consultant is able and willing to provide such services to the City that were described in the scope of work included in the RFP 23-109A.
- C. In undertaking the performance of this Agreement, Consultant represents that it is knowledgeable in its field and that any services performed by Consultant under this Agreement will be performed in compliance with such standards as may reasonably be expected from a professional consulting firm in the field.

NOW THEREFORE, in consideration of the mutual and respective promises, and subject to the terms and conditions hereinafter set forth, the Parties agree as follows:

1. SCOPE OF SERVICES

Consultant shall perform during the term of this Agreement, the tasks and obligations including all labor, materials, tools, equipment, and incidental customary work required to fully and adequately complete the services described and set forth in Scope of Work, that was included in RFP 23-109A, which is attached as **Exhibit A**, attached hereto and incorporated by reference, and as further described in Consultant’s Proposal incorporated herein by reference.

2. COMPENSATION

- a. City agrees to pay, and Consultant agrees to accept as total payment for its services for City, the rates and charges identified in **Fee Proposal - Exhibit B**. The total amount to be expended during the term of this Agreement shall not exceed \$142,700.
- b. Payment by City shall be made within forty-five (45) days following receipt of proper invoice evidencing work performed, subject to City accounting procedures. Payment need not be made for work which fails to meet the standards of performance set forth in the Recitals which may reasonably be expected by City.

3. TERM

This Agreement shall commence on the date first written above for a **three (3) year term** with the option for the City to grant up to a **two (2) one-year** renewals, exercisable by a writing by the City Manager, City Attorney, and General Counsel for the Housing Authority of the City of Santa Ana unless terminated earlier in accordance with Section 15, below.

4. INDEPENDENT CONTRACTOR

Consultant shall, during the entire term of this Agreement, be construed to be an independent contractor and not an employee of the City. This Agreement is not intended nor shall it be construed to create an employer-employee relationship, a joint venture relationship, or to allow the City to exercise discretion or control over the professional manner in which Consultant performs the services which are the subject matter of this Agreement; however, the services to be provided by Consultant shall be provided in a manner consistent with all applicable standards and regulations governing such services. Consultant shall pay all salaries and wages, employer's social security taxes, unemployment insurance and similar taxes relating to employees and shall be responsible for all applicable withholding taxes.

5. OWNERSHIP OF MATERIALS

This Agreement creates a non-exclusive and perpetual license for City to copy, use, modify, reuse, or sublicense any and all reports which are delivered by Consultant under this Agreement ("Documents & Data"). Consultant represents and warrants that Consultant has the legal right to deliver any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were provided to Consultant by the City. City shall not be limited in any way in its use of the Documents and Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at City's sole risk.

6. INSURANCE

Consultant shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the Consultant, his agents, representatives, employees or subcontractors.

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

1. Commercial General Liability (CGL): Insurance Services Office (ISO) Form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal and advertising injury with limits no less than **\$1,000,000** per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.

2. Automobile Liability: ISO Form Number CA 00 01 covering any auto (Code 1), or if Contractor has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limit no less than

\$1,000,000 per accident for bodily injury and property damage. (*Not required if Consultant will not be using a vehicle*).

3. Workers' Compensation insurance as required by the State of California, with Statutory Limits, and Employers' Liability insurance with a limit of no less than **\$1,000,000** per accident for bodily injury or disease.

If the Consultant maintains broader coverage and/or higher limits than the minimums shown above, the City requires and shall be entitled to the broader coverage and/or the higher limits maintained by the Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City .

Other Insurance Provisions

The General Liability insurance policies are to contain, or be endorsed to contain, the following provisions:

Additional Insured Status

The City , its officers, officials, employees, and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Consultant's insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of **both** CG 20 10, CG 20 26, CG 20 33, or CG 20 38; **and** CG 20 37 if a later edition is used).

Primary Coverage

For any claims related to this contract, the Consultant's insurance coverage shall be primary coverage at least as broad as ISO CG 20 01 04 13 as respects the City , its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the City , its officers, officials, employees, or volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

Notice of Cancellation

Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to the City .

Waiver of Subrogation

Consultant hereby grants to City a waiver of any right to subrogation which any insurer of said Consultant may acquire against the City by virtue of the payment of any loss under such insurance. Consultant agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City has received a waiver of subrogation endorsement from the insurer.

Self-Insured Retentions

Self-insured retentions must be declared to the City . The City may require the Consultant to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy

language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or City .

Acceptability of Insurers

Insurance is to be placed with insurers authorized to conduct business in the state with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to the City .

Verification of Coverage

Consultant shall furnish the City with original Certificates of Insurance including all required amendatory endorsements (or copies of the applicable policy language effecting coverage required by this clause) and a copy of the Declarations and Endorsement Page of the CGL policy listing all policy endorsements to City before work begins. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them.

The City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

Special Risks or Circumstances

City reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

7. INDEMNIFICATION

Consultant agrees to defend, and shall indemnify and hold harmless the City, its officers, agents, employees, contractors, special counsel, and representatives from liability: (1) for personal injury, damages, just compensation, restitution, judicial or equitable relief arising out of claims for personal injury, including death, and claims for property damage, which may arise from the negligent operations of the Consultant, its subcontractors, agents, employees, or other persons acting on its behalf which relates to the services described in section 1 of this Agreement; and (2) from any claim that personal injury, damages, just compensation, restitution, judicial or equitable relief is due by reason of the terms of or effects arising from this Agreement. This indemnity and hold harmless agreement applies to all claims for damages, just compensation, restitution, judicial or equitable relief suffered, or alleged to have been suffered, by reason of the events referred to in this Section or by reason of the terms of, or effects, arising from this Agreement. The Consultant further agrees to indemnify, hold harmless, and pay all costs for the defense of the City, including fees and costs for special counsel to be selected by the City, regarding any action by a third party challenging the validity of this Agreement, or asserting that personal injury, damages, just compensation, restitution, judicial or equitable relief due to personal or property rights arises by reason of the terms of, or effects arising from this Agreement. City may make all reasonable decisions with respect to its representation in any legal proceeding. Notwithstanding the foregoing, to the extent Consultant's services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

8. INTELLECTUAL PROPERTY INFRINGEMENT INDEMNIFICATION

Consultant shall defend and indemnify the City from and against any third party claim, demand, action or suit brought against City alleging that the services performed under this Agreement by Consultant infringe the patent, trade secret, copyright or other valid intellectual property right of such third party and, as Consultant's sole obligation and City's sole and exclusive remedy, Consultant shall pay for the cost of defense and any amount finally awarded in any judgment rendered against City by a court of competent jurisdiction. The foregoing Obligations of Iron Mountain are conditional upon the duty of City to provide Consultant with prompt written notice of any such claim, suit or demand. City hereby consents and authorizes Consultant to have and maintain the sole control of the defense of any resulting litigation or settlement thereof. Consultant shall have no liability or obligation to City with respect to any claim of infringement or misappropriation in the event and to the extent based upon (i) use of or access to the services in or from an application or environment or on a platform or with devices not authorized in the applicable Consultant published documentation or other requirements specified under this Agreement, (ii) modifications, alterations, combinations or enhancements of the services not created by Consultant or (iii) any patent, copyright, or trade secret in which City has an interest. The foregoing indemnification obligations shall not apply in the event and to the extent that the claim or demand arises as a result of City's negligence, intentional misconduct, or failure to use the services in accordance with applicable documentation or breach of this Agreement.

If any services are held, or in the Consultant's reasonable opinion could be held, to constitute an infringement or misappropriation of any third party's intellectual property rights, Consultant may at its option (a) procure the right for City to continue using or accessing the services, (b) replace the services with a non-infringing equivalent service or (c) modify the services to make them non-infringing and without substantially compromising their functionality. This paragraph states Consultant's entire obligation to City and City's sole and exclusive remedy with respect to any claims of infringement or misappropriation.

9. RECORDS

Consultant shall keep records and invoices in connection with the work to be performed under this Agreement. Consultant shall maintain complete and accurate records with respect to the invoices rendered under this Agreement for any services, expenditures, and disbursements charged to the City for a minimum period of three (3) years, or for any longer period required by law, from the date of final payment to Consultant under this Agreement. All such records and invoices shall be clearly identifiable. Consultant shall allow a representative of the City to examine, audit, and make transcripts or copies of such records during regular business hours-and upon five business days' notice.

10. CONFIDENTIALITY

If Consultant receives from the City information which due to the nature of such information is reasonably understood to be confidential and/or proprietary, Consultant agrees that it shall not use or disclose such information except in the performance of this Agreement, and further agrees to exercise the same degree of care it uses to protect its own information of like

importance, but in no event less than reasonable care. “Confidential Information” shall include all nonpublic information. Confidential information includes not only written information, but also information transferred orally, visually, electronically, or by other means. Confidential information disclosed to either party by any subsidiary and/or agent of the other party is covered by this Agreement. The foregoing obligations of non-use and nondisclosure shall not apply to any information that (a) has been disclosed in publicly available sources; (b) is, through no fault of the Consultant disclosed in a publicly available source; (c) is in rightful possession of the Consultant without an obligation of confidentiality; (d) is required to be disclosed by operation of law; or (e) is independently developed by the Consultant without reference to information disclosed by the City.

11. CONFLICT OF INTEREST CLAUSE

Consultant covenants that it presently has no interests and shall not have interests, direct or indirect, which would conflict in any manner with performance of services specified under this Agreement.

12. NON-DISCRIMINATION

Consultant shall not discriminate because of race, color, creed, religion, sex, marital status, sexual orientation, gender identity, gender expression, gender, medical conditions, genetic information, or military and veteran status, age, national origin, ancestry, or disability, as defined and prohibited by applicable law, in the recruitment, selection, teaching, training, utilization, promotion, termination or other employment related activities or any services provided under this Agreement. Consultant affirms that it is an equal opportunity employer and shall comply with all applicable federal, state and local laws and regulations.

13. EXCLUSIVITY AND AMENDMENT

This Agreement represents the complete and exclusive statement between the City and Consultant, and supersedes any and all other agreements, oral or written, between the Parties. In the event of a conflict between the terms of this Agreement and any attachments hereto, the terms of this Agreement shall prevail. This Agreement may not be modified except by written instrument signed by the City and by an authorized representative of Consultant. The Parties agree that any terms or conditions of any purchase order or other instrument that are inconsistent with, or in addition to, the terms and conditions hereof, shall not bind or obligate Consultant or the City. Each party to this Agreement acknowledges that no representations, inducements, promises or agreements, orally or otherwise, have been made by any party, or anyone acting on behalf of any party, which is not embodied herein.

14. ASSIGNMENT

Inasmuch as this Agreement is intended to secure the specialized services of Consultant, Consultant may not assign, transfer, delegate, or subcontract any interest herein without the prior written consent of the City and any such assignment, transfer, delegation or subcontract without the City’s prior written consent shall be considered null and void. Nothing in this Agreement shall

be construed to limit the City's ability to have any of the services which are the subject to this Agreement performed by City personnel or by other Consultants retained by City.

15. TERMINATION

This Agreement may be terminated by the City upon thirty (30) days written notice of termination. In such event, Consultant shall be entitled to receive and the City shall pay Consultant compensation for all services performed by Consultant prior to receipt of such notice of termination, subject to the following conditions:

- a. As a condition of such payment, the Executive Director may require Consultant to deliver to the City all work product(s) completed as of such date, and in such case such work product shall be the property of the City unless prohibited by law, and Consultant consents to the City's use thereof for such purposes as the City deems appropriate.
- b. Payment need not be made for work which fails to meet the standard of performance specified in the Recitals of this Agreement.

16. WAIVER

No waiver of breach, failure of any condition, or any right or remedy contained in or granted by the provisions of this Agreement shall be effective unless it is in writing and signed by the party waiving the breach, failure, right or remedy. No waiver of any breach, failure or right, or remedy shall be deemed a waiver of any other breach, failure, right or remedy, whether or not similar, nor shall any waiver constitute a continuing waiver unless the writing so specifies.

17. JURISDICTION - VENUE

This Agreement has been executed and delivered in the State of California and the validity, interpretation, performance, and enforcement of any of the clauses of this Agreement shall be determined and governed by the laws of the State of California. Both Parties further agree that Orange County, California, shall be the venue for any action or proceeding that may be brought or arise out of, in connection with or by reason of this Agreement.

18. PROFESSIONAL LICENSES

Consultant shall, throughout the term of this Agreement, maintain all necessary licenses, permits, approvals, waivers, and exemptions necessary for the provision of the services hereunder and required by the laws and regulations of the United States, the State of California, the City of Santa Ana and all other governmental agencies. Consultant shall notify the City immediately and in writing of its inability to obtain or maintain such permits, licenses, approvals, waivers, and exemptions. Said inability shall be cause for termination of this Agreement.

19. NOTICE

Any notice, tender, demand, delivery, or other communication pursuant to this Agreement

shall be in writing and shall be deemed to be properly given if delivered in person or mailed by first class or certified mail, postage prepaid, or sent by fax or other telegraphic communication in the manner provided in this Section, to the following persons:

To Housing Authority of the City of Santa Ana:

Attn: Secretary
Housing Authority of the City of Santa Ana
20 Civic Center Plaza (M-30)
P.O. Box 1988
Santa Ana, CA 92702-1988
Fax: 714- 647-6956

To City of Santa Ana:

City Clerk
City of Santa Ana
20 Civic Center Plaza (M-30)
P.O. Box 1988
Santa Ana, CA 92702-1988
Fax: 714- 647-6956

With courtesy copies to:

Executive Director,
Community Development Agency
City of Santa Ana
20 Civic Center Plaza (M-27)
P.O. Box 1988
Santa Ana, California 92702

To Consultant:

Iron Mountain Information Management, LLC One Federal Street Boston, MA 02110

A party may change its address by giving notice in writing to the other party. Thereafter, any communication shall be addressed and transmitted to the new address. If sent by mail, communication shall be effective or deemed to have been given three (3) days after it has been deposited in the United States mail, duly registered or certified, with postage prepaid, and addressed as set forth above. If sent by fax, communication shall be effective or deemed to have

been given twenty-four (24) hours after the time set forth on the transmission report issued by the transmitting facsimile machine, addressed as set forth above. For purposes of calculating these time frames, weekends, federal, state, County or City holidays shall be excluded.

20. Limitation on Liability.

Liability for Non-Storage Services. With respect to services not related to the storage of Deposits, Consultant shall not be liable for any loss or default unless such loss or default is due to the negligence of Consultant. If liable, the amount of Consultant's maximum liability for any loss or default shall be: (i) if such loss or default relates to a discrete project, the total fees paid by City to Consultant for such project; or (ii) if such loss or default arises from services that are of an ongoing and continuing nature, the total amount of fees paid by City to Consultant for the performance of such services during the immediately preceding twelve-month period..

No Consequential Damages. In no event shall either party be liable for any consequential, incidental, special or punitive damages, or for loss of profits or loss of data, regardless of whether an action is brought in tort, contract or under any other theory.

21. Limited Warranty.

Consultant warrants that the services provided under this Agreement will be performed in accordance with industry standards as set forth by ANSI/ASQC (American National Standards Institute/American Society for Quality Control), specifically ANSI/ASQ Z1.4-2004, Sections 4 and 9 incorporated herewith by reference, described in the Consultant's Statement of Work, and will be provided in substantial conformance with Consultant-supplied documentation applicable to the services. This warranty is limited and shall not apply to any of the services where the failure to satisfy this warranty resulted, in whole or in part, from City's improper use of the services. In the event of Consultant's breach of the foregoing warranty, City's exclusive remedy and Consultant's entire liability shall be for Consultant to promptly re-perform the applicable services, at no charge, and bring the performance of the services into compliance with the terms of this warranty.

The warranties set forth above are the sole and exclusive warranties of Consultant under this agreement and are in lieu of any and all other warranties, whether express, statutory or implied, including without limitation the implied warranties of merchantability and fitness for a particular purpose or use. All such other warranties are hereby disclaimed by Consultant and waived by City. The existing warranties extend only to City. Consultant will not be liable for any third party claim or demand against City in connection with this section.

22. MISCELLANEOUS PROVISIONS

- a. Each undersigned represents and warrants that its signature herein below has the power, authority and right to bind their respective Parties to each of the terms of this Agreement, and shall indemnify City fully, including reasonable fees and attorney's fees, for any injuries or damages to City in the event that such authority or power is not, in fact, held by the signatory or is withdrawn.

- b. All Exhibits referenced herein and attached hereto shall be incorporated as if fully set forth in the body of this Agreement.

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement the date and year first above written.

[signatures on following page]

ATTEST:

CITY OF SANTA ANA

Jennifer L. Hall
City Clerk

Steven A. Mendoza
Acting City Manager

ATTEST:

**HOUSING AUTHORITY OF
THE CITY OF SANTA ANA**

Jennifer L. Hall
Recording Secretary

Michael Garcia
Executive Director

APPROVED AS TO FORM:

SONIA R. CARVALHO
City Attorney and
Housing Authority General Counsel

**CONSULTANT: IRON MOUNTAIN
INFORMATION MANAGEMENT, LLC**

By: Andrea Garcia-Miller
Andrea Garcia-Miller
Assistant City Attorney and
Assistant Counsel

DocuSigned by:
Sheila A. Poggi
9EB1BE384BC14F3...
By: Sheila A. Poggi
Title: sr Mgr, Public Sector Contracts

SLED0002798

RECOMMENDED FOR APPROVAL:

Michael Garcia
Executive Director
Community Development Agency

Approved as to Form and Legal Content:
Iron Mountain Legal Department
Christine G. Jennings
Christine G. Jennings, Counsel, Gov't
Contracts & Compliance
Name: Santa Ana
Date: November 13, 2023

EXHIBIT A

SCOPE OF SERVICES



Iron Mountain Proposal For

City of Santa Ana

Solicitation No. 23-109A

Submitted To: The City of Santa Ana – Community
Development Agency
20 Civic Center Plaza, Santa Ana, CA 92701

Submitted By: Iron Mountain Information Management, LLC
One Federal Street, Boston, MA 02110

Duns: 621417633
CAGE Code: 1F2Y7
IMGS Number: SLED0002978
Submission Date: August 10,
2023

This proposal contains Iron Mountain confidential and proprietary information. Such data are exempt from FOIA disclosure under 5 U.S.C. § 552 (b)(4), (7), prohibited from disclosure under 18 U.S.C. § 1905, and are submitted based on the understanding that information is being provided under an assurance of confidentiality. The data subject to this restriction are contained in all pages hereof. ©2023 Iron Mountain Incorporated. All rights reserved. Iron Mountain and the design of the mountain are registered trademarks of Iron Mountain Incorporated in the U.S. and other countries. All other trademarks are the property of their respective owners.



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1.0 Statement of Qualifications (SOQ)

a. Cover Letter

Jacqueline Nguyen, Housing Authority Operations Supervisor
City of Santa Ana – Community Development Agency
20 Civic Center Plaza
Santa Ana, CA 92701

Reference: Request for Proposals No. 23-109A for Document Storage and Imaging

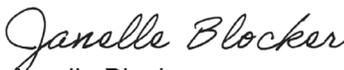
Dear Ms. Nguyen:

Iron Mountain is pleased to submit our proposal to support the City of Santa Ana's Document Storage and Imaging Services project. As an existing provider to the City of Santa Ana (the City), we understand your need for an experienced and qualified vendor to provide records management services. We have an established local presence with six (6) records centers located within 30 miles of the City Hall. To address the RFP requirements, we offer the City geographical compatibility, proven processes, more than 70 years' experience, and comprehensive services.

Iron Mountain looks forward to continuing a relationship with the City. Our business entity is a Limited Liability Corporation, and as outlined in the RFP, our proposal will be considered valid for a minimum of 180 days from Thursday, August 10, 2023. Should we be the successful Offeror, Iron Mountain agrees to negotiate the terms and conditions with the City in good faith.

Please note that I am the individual authorized to negotiate on behalf of Iron Mountain. Please contact me at 202-643-5491 or Janelle.blocker@ironmountain.com should you have any further questions.

With regards,


Janelle Blocker
Contracts Manager, Public Sector

b. Services Provided

Project Objective

The City of Santa Ana (the City) is seeking a trusted provider to store their current and future records for the Housing Authority of the City of Santa Ana (SAHA), the City of Santa Ana's (COSA) Community Development Agency (CDA), and Finance & Management Services Agency (FMSA) (collectively COSA). With approximately 1,829 boxes ready for storage, SAHA and COSA require a provider with secure facilities that are within 30 miles of City Hall while also having capacity for your future storage needs. In addition to records management services, the City prefers a provider who can also offer digital conversion services, digital storage, off-site access, and other related services.

Iron Mountain has been a trusted Records Management partner to the City since 2016. As such, Iron Mountain is well-positioned to continue to meet your records management requirements and help SAHA and COSA free-up office real estate for boxes currently being stored at your premises. Iron Mountain offers ideal geographic compatibility, secure chain of custody, a proven retrieval process, and a tenured operational team. We are a full-service information and records management provider with capabilities to deliver comprehensive imaging services to digitize your records if needed.

Proposed Solution

Our solution for the City has been designed around your specific goals and information governance. With a commitment to remain as your trusted information management partner, Iron Mountain will deliver a records management solution built on integrity, a passion to protect, and service excellence.

We will use the most cost efficient and effective routes to securely pick up and/or deliver your records and store them in one of our six (6) facilities that are within a 30 mile radius of the City of Santa Ana's City Hall. With over 70 years of industry experience and a history of working with the City for seven (7) years, we offer a proven chain of custody and barcoding system to ensure your records are protected while in our possession. Our comprehensive records and information management services include standardized solutions for transportation, retrievals, refiles, interfiling, rush/critical delivery, indexing, scanning, destruction, carton purchases, and specialized labor.

Key elements of our solution to the City include:



Compatible Geographic Footprint

We offer secure records management storage within 30 miles of the City Santa Ana's City Hall at our facilities in Pico Rivera, Santa Ana, La Palma, Cerritos, and Fullerton, California.



Pickup and Delivery Services

We validate that all new items are received with descriptive information. Whether that information is keyed by us or by the City via Iron Mountain Connect (IMConnect), we use multiple checks and balances to ensure quality inventory control. We also offer efficient pick-up and delivery schedules.



Auditable Chain of Custody

With multiple barcode scan points, we offer proven workflow and technology-enabled tagging for enhanced visibility and control over your inventory stored with Iron Mountain.



Easy-to-use Self-Service Tools for On-Demand Reporting

Iron Mountain Connect (IMConnect), our proprietary records management application, provides a robust cloud-based tool to retrieve information on your boxes and files. The City will be able to run a host of informative reports about retention and disposal practices, helping to evaluate performance and maintain compliance.



Designated Point of Contact for Customer Service

Iron Mountain assigns a Customer Success Manager (CSM) to support our public sector clients. In an effort to deliver exceptional customer service, Tina Lapent will serve as your CSM and be your single point of contact for any questions or issues on your account. In addition, our experienced Project Manager is Jose Felix, a 19-year Iron Mountain veteran based in the Los Angeles market.



Digitization Services

Iron Mountain can provide retrievals through our Image on Demand service which provides a digitized/scanned retrieval solution for paper-based documentation with secure transfer of the output package to the destination system.

Capabilities and Experience

Iron Mountain provides our customers with industry best practices, defined processes, and tested procedures to support the overall management of records and information programs. We support over 100 public sector agencies in California and understand the importance of maintaining a secure chain of custody and complying with regulations, governance and compliance mandates such as HIPAA. In *Attachment B*, we have provided references that can validate our performance and our ability to meet the City’s requirements. We have also highlighted our experience in the table below:

Project	Secure Chain of Custody	Transportation	Records Management	Retrievals
<p>State of Arizona <i>An initial 3000,000 boxes moved to Iron Mountain from multiple departments</i></p>	●	●	●	●
<p>Illinois Housing Development Authority <i>Climate-controlled storage for 22,776 boxes including tapes, media, and paper records</i></p>	●	●	●	●

Project	Secure Chain of Custody	Transportation	Records Management	Retrievals
USPTO <i>Relocated 2.5 million files from self-managed facility to Iron Mountain</i>	●	●	●	●

Figure 1. Similar Project Experience.

Outcome

Iron Mountain's commitment to the City is to continue to protect the information you value most, from everyday to the extraordinary. We will continue to build value with a passion for preserving the physical, transforming the digital, while respecting the environment.

c. Agreement Statement

In accordance with Section VI. D. EXCEPTIONS of the RFP, Iron Mountain submitted proposed modifications in the Question and Answer period. Iron Mountain submits this proposal with those exceptions and should Iron Mountain be the successful Offeror, agrees to enter into good faith negotiations with the City.

d. Firm and Team Experience

i. Iron Mountain Overview

Founded in 1951, Iron Mountain is a large business and global leader in storage and information management services, serving more than 225,000 customers around the world. We have approximately 10,000 employees in the United States and 26,000 employees globally. In California, we have 1,100 employees, and for the City of Santa Ana, approximately 12 employees will work directly on this agreement.

Hundreds of public sector agencies across the U.S., 44 of the 50 state governments in the U.S., and 94% of Fortune 1000 companies rely on Iron Mountain as their information management partner. Our experience, knowledge, and reputation combined make us a leading provider for public sector agencies. In 2016, we began servicing the City of Santa Ana's records management needs. As we currently provide services to the City, we look forward to building on our existing relationship and storing current and additional records for Housing Authority of the City of Santa Ana (SAHA), the City of Santa Ana's (COSA) Community Development Agency (CDA), and Finance & Management Services Agency (FMSA), collectively COSA.

ii. Iron Mountain Location

In order to support public sector agencies, Iron Mountain has records management facilities throughout the United States, and we have six (6) facilities available to support the City. **Figure 2** outlines the details of our nearest facilities and headquarters:

Iron Mountain Location Details	
Iron Mountain Headquarters	One Federal Street, Boston, MA 02110 Phone: 800-934-3453

Iron Mountain Location Details	
Servicing Addresses for the City of Santa Ana	8700 Mercury Lane, Pico Rivera, CA 90660 1915 S Grand Ave, Santa Ana, CA 92705 6711 Valley View St., La Palma, CA 90623 12958 Midway Place, Cerritos, CA 90703 600 Burning Road, Fullerton, CA 92833 16028 Marquardt Ave., Cerritos, CA 90703

Figure 2. Iron Mountain Addresses.

iii. Project Manager

We are committed to providing the City with a support team to deliver an effective records management and imaging solution. Jose Felix, Operations Manager, will serve as the Project Manager for SAHA and COSA. His contact information is: office 619-205-5345 and mobile 619-778-6644. Jose is a long-term employee of Iron Mountain, having started with the company in 2004 as a Record Center Coordinator. After serving in that capacity successfully for seven (7) years, he assumed the role of Special Projects Coordinator in 2011 for the San Diego market. In 2017, Jose was promoted to Operations Supervisor for San Diego in which he was responsible for overseeing 18 employees, two (2) record centers, and the transportation department. In 2021, Jose advanced to his current role, and he is now responsible for the Los Angeles market as an Operations Manager.



To deliver exceptional customer service, we also assign Customer Success Managers (CSM) to support our public sector clients. Tina Lapent will serve as your CSM and be available as your point of contact for any questions or issues. She has been with Iron Mountain for over 12 years and began as a public sector CSM role in 2022. Tina works with clients in six (6) states and is responsible for assisting with contract modifications and services changes, as needed. She will provide training and assistance on our self-service customer portals, such as IMConnect, which offers the City on-demand tools to generate reporting, request services, and review services.

e. Proposed Work Plan

i. Approach

Given our breadth of experience and capabilities, we will provide SAHA and COSA with confidence to entrust their document storage and digital imaging needs with Iron Mountain. We offer the City a convenient and compliant document storage program that will securely store your 1,829 boxes and accommodate any increase in records that may be needed by SAHA and COSA. As outlined in our *Technical Proposal* within the sections below, we will provide SAHA and COSA with industry best practices, defined processes, and tested procedures to support the overall document management and digital imaging programs needed.

General

Secure Record Centers (Exhibit I, General, items a and f)

Iron Mountain has six (6) record centers that are within a 30 mile radius of the City of Santa Ana’s City Hall located at 20 Civic Center Plaza. Given the close proximity, we are able to use pick up and delivery routes that are most cost efficient and effective to SAHA and COSA. All of Iron Mountain’s

record centers comply with established company standards and with all appropriate building, fire and safety, electrical, mechanical, and other regulatory codes.

Professional Moving and Storing Records (*Exhibit I, General, items b, c, d and Record Storage, item g*)

Iron Mountain's chain of custody practices mitigate any risk associated with the movement of SAHA and COSA's records to and from Iron Mountain's facilities. We mitigate the risk of exposure and damage to all records in our storage facilities by applying strict standards regarding structural integrity in the design of our records centers and storage systems and through employee training and strict adherence to procedures governing the transportation, handling, and storage of customer materials. We require employees who operate equipment within a record center to be trained and certified in its operation. Our storage system design has built-in protections against carton damage and is interconnected throughout the record center, providing extra structural integrity.

Iron Mountain's process to prepare boxes for transport is an important element to prevent the damage or deterioration of the boxes or material contained within the boxes. To prevent crushing, we will prepare each pallet of boxes in a standard cross 8-block formation with 48 boxes per pallet. This is a best practice for shipping boxes that has proven to be effective in reducing movement and damage when transporting boxes plus ensuring safety. Any re-boxing required will be performed by SAHA and COSA with no charge. Once the City's boxes are relocated to Iron Mountain's facility, all source materials will be stored in a manner that continues to prevent damage or other deterioration. As noted in the Scope of Services, *Records Storage, item g*, we confirm that the City's records will be stored four (4) inches off the ground. In the event there are any loose records, Iron Mountain will communicate with designated stakeholders for SAHA and COSA for how to proceed.

Adding or Removing Departments (*Exhibit I, General, item e*)

We offer COSA Departments the ability to add or remove accounts (Departments) as needed through the term of the contract. At any point, Iron Mountain can add additional inventory to our record centers. Removal of any boxes are subject to the permanent withdrawal fees outlined in our price proposal. Within IMConnect, our customer portal, the City can create, modify and manage users and privileges across divisions, departments, and locations. *Additional information on IMConnect's capabilities are outlined on page 12.*

Pest Inspection Services (*Exhibit I, General, item k*)

As part of our operating procedures, Iron Mountain contracts with various local companies for pest inspection or treatment services. For most locations, pest inspections are performed every other month. We will provide SAHA and COSA proof of treatment on a semi-annual basis.

Vehicles and Qualified Staff (*Exhibit I, General, item g*)

Iron Mountain will provide all necessary vehicles, and qualified staff and clerical support to perform the services required by SAHA and COSA. To ensure the safety and security of our customer's material in transit, our vehicles feature a patented InControl Transportation System that utilizes real-time wireless scanning technology to validate pickup and delivery transactions. Our patented security controls mitigate transportation workflow errors and include the items identified in **Figure 3:**

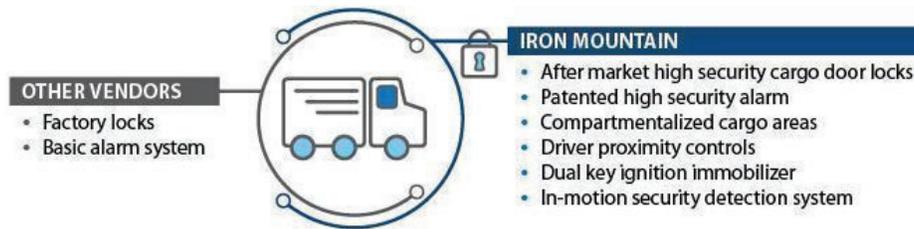


Figure 3. Iron Mountain Transportation Security Controls.

Standard operating procedures are created by our delivery teams in order to support clearly defined processes that are designed to meet the need for consistent and secure information transport through error reduction and process integrity. Our qualified drivers are trained to follow careful procedures during the loading and transport of all customer material to prevent exposure to risk at any Iron Mountain location. We have instituted a strict loading and unloading process that is supervised by an Iron Mountain employee and ensures vehicle and facility doors are only unlocked and opened during the loading and unloading process.

In addition to our team of drivers, record centers are staffed with qualified employees serving in a variety of roles. Prior to the start of employment, Iron Mountain employees are trained on records management procedures and policies to ensure safe-keeping of our customers’ information. Our record centers are led by an Operations Manager or Supervisor who oversees the onsite staff. They participate in regular briefings, support operational tasks, and assist with issue resolution and remediation. We also have a team of Record Center Coordinators to oversee schedules, processes and customer requests. To provide services for the City, some of our team members include:

- **Jack McMeekin**, Operations Manager - 40 years with Iron Mountain
- **Dustin Kelii**, Records Management Supervisor - 15 years with Iron Mountain
- **Angel Vega**, Records Management Supervisor - 21 years with Iron Mountain
- **Silverio Alonso**, Records Management Supervisor - 7 years with Iron Mountain
- **Jose Felix**, Operations Manager - 19 years with Iron Mountain
- **Jeff Knaus**, Transportation Manager - 27 years with Iron Mountain
- **Bruce Casey**, Transportation Coordinator - 41 years with Iron Mountain
- **Fernando Alvarez**, Transportation Coordinator - 18 years with Iron Mountain

Background Check Process (Exhibit I, General, item j)

Iron Mountain strives to hire and retain the best candidates for all positions. By using stringent pre-employment screening, we ensure our staff are qualified and prepared to serve our customers with integrity. In lieu of the criminal records clearance from the State of California Department of Justice, Iron Mountain will implement our standard background check process which includes the following elements in **Figure 4**:



Figure 4. Iron Mountain’s Background Screening Elements.

Additional details about the background check can be provided upon request. We utilize an enterprise HR system to maintain a record for all hiring activities, which includes an integrated interface with our background screening vendor. Iron Mountain employees also undergo recurring background investigations every three (3) years. Employees sign confidentiality agreements as part of their employment with Iron Mountain, so SAHA and COSA can be assured that any sensitive information will be treated as such.

Compliance with HIPAA and OSHA (Exhibit I, General, items h and i)

Iron Mountain's secure facilities, coupled with our chain-of-custody controls, offer an end-to-end approach to managing and controlling material to ensure compliance with HIPAA regulations. The HIPAA Privacy Rule requires establishing and implementing measures to ensure the confidentiality, integrity, and availability of all PHI, while the Security Rule addresses safeguards specific to the security of electronic Protected Health Information (ePHI). Iron Mountain maintains compliance with several security standards to protect our customers' data while in our custody including HIPAA compliance, FISMA compliance, FedRAMP Ready status, ISO 50001 and 27001 certifications, PCI-DSS compliance, NIST SP 800-53 compliance, and SOC 2 and SOC 3 compliance.

Iron Mountain is committed to eliminating or controlling workplace hazards that could cause injury or illness to our employees. This is accomplished through compliance with applicable federal, and state safety standards, including the Occupational Safety and Health Administration (OSHA) standards and codes as set forth by the U.S. Department of Labor and the State of California (Cal/OSHA). We maintain a company-wide Safety and Health Program that strives to reduce the incidence of occupational injury and illness by eliminating or controlling risks associated with our operations, and ensure compliance with applicable laws and regulatory requirements. As part of our health and safety program, we continually monitor our performance to determine the effectiveness of the program. We also prepare and report work-related injuries and illnesses via the OSHA Form 300A.

Records Storage

Pickup Workflow (Exhibit I, Record Storage, item a)

Iron Mountain's workflows combine standard operating procedures with multiple barcode scan points to ensure SAHA and COSA records are accurately processed. Highlights of our pickup workflow are depicted in **Figure 5** below:

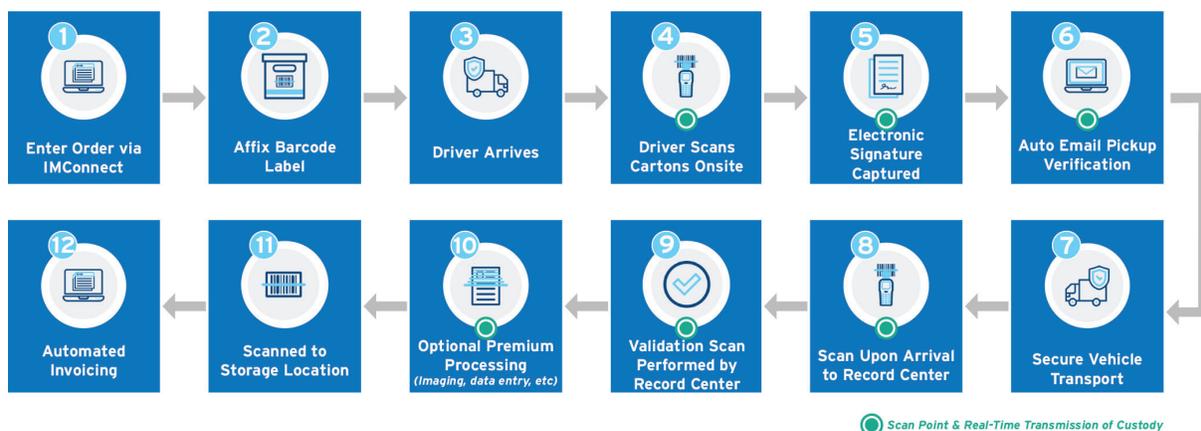


Figure 5. Iron Mountain's Incoming Workflow.

Iron Mountain will provide pick-up and delivery service to SAHA and COSA, and if needed, additional departments at the same location and same time without additional fees, using the following SLAs and the SLAs referenced for retrievals:

- **Regular Pick-Up:** Pick-up will occur one (1) time per week on either Tuesday, Thursday or Friday.
- **Rush Pick-Up:** Pick-up orders placed before 3 pm on a business day will be picked up on the following business day.

Records Retrieval Workflow (Exhibit I, Record Storage, item h)

Iron Mountain’s customer portal, IMConnect, provides SAHA and COSA with the ability to request records to be returned, as required, either by individual files, units of records, or entire containers of records. To simplify and accelerate the retrieval process, authorized SAHA and COSA users can use IMConnect to submit service requests for all records stored in Iron Mountain facilities. SAHA and COSA can retrieve records by phone, fax, or email 24/7/365. All record types are retrieved by records center staff and sent to the specified SAHA and COSA location in accordance with their respective service level agreements. In addition, Iron Mountain facilities contain private viewing areas that SAHA and COSA will have access to for file auditing or reviews if necessary.

Iron Mountain utilizes standard procedures, depicted in **Figure 6**, and trained personnel to accurately locate the records for retrieval with an auditable chain of custody.

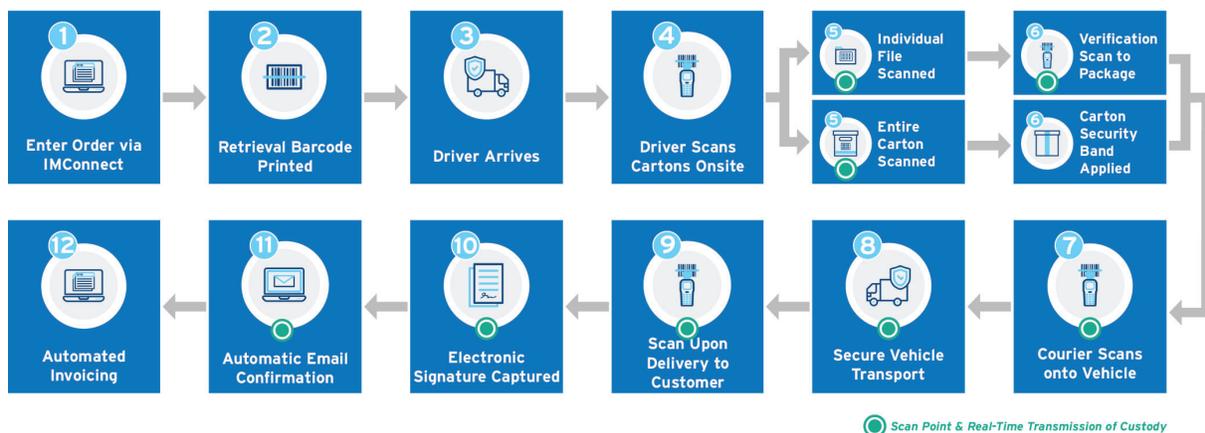


Figure 6. Iron Mountain Retrieval Workflow.

Our retrieval workflow employs a triple-check process. First, each carton or group of files pulled for retrieval is tagged with a retrieval label, which is scanned against the original barcode to ensure order accuracy. We secure the contents of every carton with a security band, scan each carton again, and load it onto a designated vehicle. Finally, our driver scans the carton a third time at SAHA and COSA location and captures an electronic signature to verify chain of custody.

We can combine delivery and pick up of records into one trip when appropriate. All requested retrievals will be delivered in accordance with the following SLAs:

- **Standard Delivery:** Orders placed by 3 pm will be delivered by 5 pm on the next scheduled delivery day (no half days)
- **Rush:** Orders placed by 3 pm will be delivered within 3 hours of receipt of the order on a business day.

- **Rush (After Hours/Weekend/Holiday):** Orders placed after 3 pm on a weekend, holiday, or after business hours will be delivered within 4 hours of receipt of the order.

Barcoding and Chain of Custody (*Exhibit I, Record Storage, items b and c*)

Iron Mountain's key tool to successfully provide inventory management begins with our proprietary inventory tracking system, SafeKeeperPLUS (SKP). SKP Inventory Control module manages the physical movement of every carton and file in our record centers by tracking records throughout their life cycle. As cartons are received at Iron Mountain, they are barcode-scanned into our system and given a unique identifier that will stay with that carton for its complete life cycle. New cartons are scanned at the dock, and again at the unique storage location that corresponds to the carton barcode. Once a carton is scanned into SKP, all further transactions are consequently recorded, building an ongoing audit trail of activity. SKP provides redundant processing and barcode tracking to location results in system-driven inventory accuracy and can update the status within 24 hours of activity - or less.



Iron Mountain scans barcodes as each item is shelved, providing rigorous chain of custody controls.

Barcodes are scanned as each item is shelved. **Iron Mountain is one of the few records management companies to scan each carton into a location.** This extra step confirms not only that cartons have been received at our loading dock, but also that they have been accurately stored in the storage system. Our record center operations leverage barcode technology to reduce data entry errors and to validate accuracy as part of our total quality processes as follows:

- **Carton ID barcode** — Each carton is identified with a unique SKP barcode number to allow Iron Mountain to track carton activity by scanning the ID barcode.
- **Location ID barcode** — All storage locations are barcoded with a unique number cross-referenced in SKP to a full address indicating capacity, carton size and client ownership. This extra step confirms that cartons have been received at our loading dock and accurately stored in the storage system which can guarantee that records are correctly located and available for efficient retrieval.
- **Retrieval label barcode** — All items (cartons or files) retrieved from Iron Mountain are barcoded with retrieval labels. These labels distinguish returning items (refiles) from new storage items (receiving and entry); they also specify item requestor and mail codes to assist with delivery directly to the requestor. When items are refilled, Iron Mountain personnel scan the retrieval labels along with the refile labels and location IDs to ensure accurate refiling. All retrievals are scanned prior to being retrieved to prevent incorrect cartons are retrieved and scanned again upon return to ensure they have been returned to the correct records center.
- **"File out" card barcode** — Two barcode labels are printed for file retrievals. One label is affixed to the file and the other to a "file out" card. File out cards are placed inside home cartons when files are retrieved. When a file is refilled, the correct file out card must be removed and scanned to confirm accurate refiling.

File Indexing and Validation (*Exhibit I, Record Storage, items d and e*)

As a part of the transfer of legacy records, SAHA and COSA will be able to migrate historical metadata for each transitioned box as well as metadata for the unique files contained within boxes. If SAHA and COSA's existing records have barcodes on the box or file, Iron Mountain will utilize the box barcodes to perform a 'marriage' scan to the new SKP carton ID barcode. Upon receiving a data upload, this information can be stored in our inventory tracking system, allowing the agency to search for, and match, boxes or files using their historical information via the IMConnect web portal.

Having a real-time, updated inventory of boxes and file locations is essential for information assurance when SAHA and COSA is requesting file-level retrievals. If there is no existing barcode and associated upload when records are received at the Iron Mountain facility, Iron Mountain staff will capture information directly off the box and associate it with the new Iron Mountain identifier (i.e., barcode ID) used to track the box in the inventory tracking system.

For any file indexing, Iron Mountain will capture the required file level metadata fields based on SAHA/COSA needs. The file data can be captured manually or via file barcode scan that Iron Mountain can provide. Iron Mountain can scan the files received from SAHA/COSA and perform a cross validation against SAHA/COSA prepared data to ensure the data is accurate representing the files in the box.

The data capture activity will occur in parallel to the box transition tasks. SAHA and COSA would be responsible for providing a distinct registry (*Note: format will be provided during the project planning phase*) with the historical box metadata, or file listings for individual boxes, that were migrated as part of that shipment. Once all boxes from the shipment have been ingested by Iron Mountain, an automated process in the inventory tracking system will be run to add the box and/or file level information into the system. File indexing and file validation are provided in our price proposal.

Reporting (*Exhibit I, Record Storage, item f*)

IMConnect will allow SAHA and COSA to view and track their records online. The IMConnect Record Center will facilitate the location of cartons or files quickly and easily, inventory management, and a customized search engine. With on-demand reporting, SAHA and COSA can run reports as needed and view the status of their inventory.

Iron Mountain developed an internal inventory tracking system, SKP, which manages the physical movement of our customers' records stored within an Iron Mountain facility. The Inventory Control module within SKP feeds directly into the customer facing platform, IMConnect. This is accomplished through built-in quality control checks utilizing barcode technology and redundant processing at each step in the workflow.

With IMConnect, we offer an easy-to-use self-service for SAHA and COSA authorized users to search through offsite inventory, request retrievals, and arrange for documents to be quickly delivered to your locations. As requested in *item f in the Scope of Services*, samples of reports are provided under the Section *Additional Requirement*. Highlights of IMConnect's features are outlined in **Figure 7**.

IMConnect Feature	IMConnect Benefit
Query, search, locate	<ul style="list-style-type: none"> • Easily locate individual records, set of records, or entire cartons • Enterprise-wide view or program-level view of records • View carton and file transaction history
Electronic retrievals	<ul style="list-style-type: none"> • Automates the retrieval process by allowing the customer to specify items requested for retrieval • Easily request cartons or files to be retrieved
Report generation	<ul style="list-style-type: none"> • On-demand reporting for quick access to information you need reduces wait time for manual reports

IMConnect Feature	IMConnect Benefit
	<ul style="list-style-type: none"> Gain valuable insights by running reports on many categories including inventory, activity, and financial data Run reports for time periods based on customer needs such as quarterly, monthly, annually, etc.
<p>Access to Iron Mountain services</p>	<ul style="list-style-type: none"> Identify necessary records Provide litigation support Perform records analysis
<p>Inventory control processes</p>	<ul style="list-style-type: none"> Custom data entry fields Custom required fields to capture critical information
<p>Custom data validation for key fields Retention Management</p>	<ul style="list-style-type: none"> Add detailed retention schedules, policies, and procedures Manage and monitor program level retention programs

Figure 7. IMConnect Features and Benefits.

Document Imaging Services and Storage

Iron Mountain’s Image on Demand will allow SAHA and COSA to have records in our storage scanned “on-demand” and made available digitally within hours of the request. Our customers find this image conversion option to be a cost-effective solution that provides efficient and effective access to their essential documents without the need to digitalize their entire document repository.

Document Conversion Processes (Exhibit I, Document Imaging Services and Storage [Optional], items h, j, and a)

Our digitization capabilities include paper-based materials such as books, journals, newspapers, manuscripts, loose-leaf notebooks, loose material in file folders, and other archival documents, maps, and catalog cards. Iron Mountain has the ability to create a tailored document conversion project to specifically meet SAHA and COSA’s paper size needs including 8 ½ x 11, 8 ½ x 14, 11 x 14, and 11 x 17.

Iron Mountain has implemented Standard Operating Procedures (SOPs) for our Document Conversion process, which are designed to ensure the accurate digitization of our customers’ documents. Our SOPs include the establishment of documentation for each unique application, acknowledgement of training for each operator involved in the application, tracking and logging of tasks and operators, and Quality Assurance (QA) inspections with corresponding corrective actions. Our Imaging Center staff is thoroughly trained on our procedures, and adherence to the SOPs is regularly verified through site inspections conducted by our Internal Audit Team.

As depicted in **Figure 8**, our digitization process includes eight steps to produce the highest quality results.



Figure 8. Iron Mountain’s Standard Document Conversion Process.

Document Conversion Methodology and Quality Control (Exhibit I, Document Imaging Services and Storage [Optional], items i, k, m, o, and l)

We will use appropriate technology and equipment to produce the required 200 DPI image. We can capture the digital image as a TIFF, PDF, or JPG, as directed by SAHA/COSA and use either as a bi-tonal (2-bit) or grayscale (8-bit per color) capture. Image capture can be applied and maintained as black and white or color as per your specifications.

Iron Mountain will perform statistical quality control utilizing the ANSI/ASQC (American National Standards Institute/American Society for Quality Control) standard Z1.4 at a 1.0 Acceptable Quality Level (AQL) to establish the sample size(s), acceptance, rejection, and re-sampling parameters. We maintain the following quality assurance measures to produce the required images:

- We apply an image quality review to ensure all captured digital images represent the original document page.
- All document pages are captured on both sides, regardless if there is no content on both sides.
- All blank pages are removed except for litigation records in which the blank pages are retained.
- Our Image Enhancement Application is performed on all digital images automatically.
- The digital image is analyzed/corrected for the highest image quality results.
- De-speckling and de-skewing actions are applied to ensure the most readable image results, along with proper right reading and alignment.

Our Quality Control plan is designed to review and monitor the quality of our customer’s information throughout the entire imaging process. As the work passes through each phase of the imaging process, it is quality-checked randomly by the unit. Upon reaching the final phase of the imaging process, SAHA and COSA can be assured that Iron Mountain has taken many precautions to prevent unacceptable images/indexes. After we deliver the final database to SAHA and COSA, if any errors are found within one (1) month, they will be corrected at Iron Mountain’s expense. For

example, backsides containing information but not scanned will be rescanned and inserted into the multipage file in the correct sequence at no cost to SAHA and COSA other than the per image cost.

Document Conversion Indexing (Exhibit I, Document Imaging Services and Storage [Optional], item b)

We create the necessary metadata fields to support standard search functionality to access the documents or data captured. For the highest achievable indexing accuracy, Iron Mountain applies its special indexing process (double-blind keying). Double-blind keying of the prime index field (e.g., employee ID number) entails two Indexing Technicians keying the same metadata for the record and polling the results. Any discrepancy is mitigated by the Quality Control Inspector.

Document Conversion Storage (Exhibit I, Document Imaging Services and Storage [Optional], items q, n, p, c, d, e, f, g)

Our experienced database engineers are equipped to handle unique customer database requirements. The database of digital images and associated indices are converted to the required file format and directory path specified by SAHA and COSA, and then validated to the specifications before the actual deliveries. The resulting database is then encrypted and burnt onto a secured external hard drive (or CD, DVD, or other output) as the final product deliverable. Once the project is complete, we deliver the encrypted database along with the associated indices to the customer.

Iron Mountain offers SAHA and COSA the following best practices we recommend for storing external hard drives or disks:

- Utilize a climate controlled environment to protect the media from extreme temperatures, humidity, or dust.
- Media should be in a secure facility to protect against unauthorized access.
- Storage should include fire protection measures such as smoke detectors and fire suppression systems.
- Incorporate redundancy and backups with duplicate copies in a disparate location.

Regarding the electronic files, our recommendation is to store them in a cloud repository such as Iron Mountain's Insight solution. *Please refer to our price proposal for details on InSight.* InSight retains electronic files securely in the cloud with advanced encryption and robust data management features for easy access and compliance. Key elements aligned with the Scope of Service include:

- When electronic records are successfully uploaded, Iron Mountain's Insight solution notifies the user through automated alerts and notifications via email or within the platform, ensuring SAHA and COSA receive real-time updates on data uploads.
- Regarding an ASCII version, this can be accomplished in several different formats including CSV, XML, Flat File, or the ASCII version. The metadata will be included in the file referencing the captured image.
- We will build a merge and quality check of the two databases during our implementation deployment and after rigorous internal and external testing prior to production.
- Prior to the export of image and metadata, we conduct a Quality Assurance process based on ANSI standards. The data will not be released unless these standards are met.

- All digitized material will be uploaded into Iron Mountain's Insight solution. Insight employs electronic data replication and offsite storage. Data is securely duplicated from primary systems to remote servers, thereby creating redundancy (e.g., mirror site).
- All digitized material will be uploaded into Iron Mountain's Insight solution. InSight maintains a business continuity plan that includes annual verification of disaster scenarios together with other Iron Mountain critical systems.
- Access to Iron Mountain's Insight solution will be provided for the SAHA/COSA users. The storage space will be allocated based on the quantity of images uploaded.

ii. Suggestions and Special Concerns

As the City of Santa Ana is a current customer of Iron Mountain, we believe that we offer enhanced value by being your sole records management provider for current records and any future increases. By centralizing your document storage needs to one vendor, Iron Mountain offers the City one single point of contact to streamline your service needs and help expedite new requests, offering an efficient and flexible model for service. Beyond records management, Iron Mountain is capable of providing digitization and archival destruction services, thereby reducing your touchpoints to one single vendor. Helping the City get the best value and save time with procuring information management services, Iron Mountain stands ready to continue to support your requirements and expand with any additional service needs and records management increases.

iii. Implementation Plan and Deliverables

An implementation timeline is dependent on the customer's speed and ability to prepare boxes for moving. Generally Iron Mountain can pick up 400 boxes (8 pallets) per load per day which is dependent on how quickly the customer can have the boxes ready. For any new material being moved to Iron Mountain, we will work with the City to develop an agreeable timeline. Once an agreement is reached to meet SAHA and COSA's stated goals, understanding the necessary steps to execution becomes the priority. Partnering with your stakeholders, Iron Mountain will facilitate a pre-implementation session focused on assisting SAHA and COSA to:

- Document overall program/engagement objectives.
- Identify your implementation stakeholders to align with the Iron Mountain team.
- Define any technology-related requirements, including system setups, authorizations, etc.
- Identify potential program/engagement risk concerns, and methods to mitigate each.
- Define and document key measurements for determining program/engagement implementation success.
- Assistance in program announcement, communication, and training strategy, leveraging proven Iron Mountain templates and resources in alignment with your internal communications protocol.
- Define the implementation timeline and expectations.

Iron Mountain's implementation professionals subsequently turn their attention from planning to execution, acting as both implementation lead and primary liaison between both organizations' key stakeholders, ensuring the successful and timely fulfillment of your program/engagement. This includes:

- Tracking/reporting of agreed-upon metrics and activity/volume levels.

- Status reviews are conducted through regularly scheduled calls throughout implementation.
- Ongoing communication with Iron Mountain markets and assigned local project leads.

Conducting post-implementation reviews is a critical step in the overall implementation process, enabling a review of the execution and communication strategy. This review addresses any exceptions and reconciliation requirements ensures a seamless and successful transition to the ongoing relationship management team members and highlights opportunities to implement cost-effective program changes.

Document Conversion Implementation Plan

All digitization projects follow a comprehensive process designed to ensure quality results. Iron Mountain has established an extensive implementation process which includes requirements development with active customer involvement, testing to validate the process and results, and finally initiation of the production phase of the project. Iron Mountain's implementation process is designed to produce images for our customers that meet all quality expectations. Before full production begins, the testing is extended to the customer for review. Upon approval, the solution is moved to full production. We will provide a detailed implementation plan upon the City exercising an option to execute a scanning project.

Change Over/Transition Period

As a current provider to the City, any boxes that currently reside at an Iron Mountain record center will remain in place and no transition would be necessary. However, any new records being transferred from the City's former vendor will follow our standard transition process. Using our proven workflow and experience, Iron Mountain can perform one pickup per day at one location with each truckload containing 400 cartons. The timeline for the process is contingent on how quickly the former vendor releases the records.

We will initiate our incoming transition of all SAHA and COSA material by scheduling execution of work flow between 7:00 am -5:00 pm Monday – Friday with the identified SAHA and COSA Operations Supervisor or Contracting Officer. The final schedule will be determined through coordination with the Operations Supervisor or Contracting Officer and based upon the actual identified box count to be transitioned to Iron Mountain's custody.

Iron Mountain will bring empty pallets, plastic wrap, and standard SKP RFID W-Labels to the SAHA and COSA site for each scheduled pick-up. Upon arrival at the SAHA and COSA facility, Iron Mountain will retrieve all identified cartons using our standard 8-block pallet stacking process with the front of the boxes containing the customer's identifiable number facing out. Iron Mountain will prepare a truck load of pallets which contains ten (10) pallets and each pallet contains 40 cartons.

Upon completion, Iron Mountain will affix our unique SKP RFID W-Label on each carton, ensuring no SAHA and COSA labels or other pertinent information is covered, and scan each carton into Iron Mountain's internal tracking database, SKP which is Iron Mountain's internal tool to successfully provide inventory management. SKP manages the physical movement of every carton and file in our record centers throughout their lifecycle. Iron Mountain scans every new piece of inventory into our database to ensure we have an accurate inventory of all of our customer's materials. Iron Mountain will work with the SAHA and COSA Operations Supervisor or Contracting Officer to determine the most effective way to transition all SAHA and COSA's historic electronic data to our tracking system.

After each carton is scanned into Iron Mountain's database, we will wrap each pallet individually and load them onto Iron Mountain's secured truck. Once each pallet has been loaded onto our truck, we will capture the signature of an authorized SAHA and COSA employee to confirm the transfer of inventory from the SAHA and COSA facility into Iron Mountain's custody.

Upon arrival back at the Iron Mountain record center, Iron Mountain's courier will unload the pallets and scan each carton to the record center inbound dock. If a carton barcode is not scanned to the inbound dock that was scanned at the SAHA and COSA site, a missing discrepancy will generate that will require immediate resolution. Conversely, if a carton barcode is scanned at the inbound dock that was not scanned onto the truck, an unexpected arrival discrepancy will also require immediate resolution.

Within 24-hours of the arrival scan being performed, Iron Mountain will assign each carton a location in our record center. This process requires an initial scan of the SKP RFID W-Label and a scan of the customer identification number to allow each carton to be identified through either Iron Mountain's internal SKP number or the unique SAHA and COSA number assigned to the carton. Each pallet received from the SAHA and COSA and inbounded at Iron Mountain's facility will receive a batch report listing of all cartons on the pallet with their assigned SKP and customer number.

Once the entire load of pallets has been scanned and assigned a location, Iron Mountain generates a missing location assignment report to identify any carton that received an arrival scan but did not receive a location assignment scan and conversely received a location assignment scan but had not received an arrival scan. If there are any discrepancies identified they are immediately resolved.

Within 72 hours of arrival at Iron Mountain's facility, all cartons will be put away in their assigned location and subsequently scanned which provides an added layer of chain of custody for each item in our record center. When all cartons have been put away in their assigned location, our Record Center Specialist will perform a scan of the pallets batch report to identify any carton that was scanned as part of the location assignment but was not scanned at the identified location. Any identified discrepancies are immediately resolved. The Iron Mountain Records Management team produces daily reports monitoring all cartons either that have not been assigned a location or have not been scanned at their proper location. All material will be accessible in SKP to the Iron Mountain staff and in our customer facing portal, IMConnect, for retrieval once the material has been given an arrival scan upon arrival to the Iron Mountain record center.

f. References

Iron Mountain has completed *Attachment B References* and included this form under the *Certifications Section*.

Additional Requirement: Sample Reporting

As required from *Exhibit I, Scope of Services, Record Storage, item f*, Iron Mountain has provided sample reports that can be run from IMConnect on the following page. Reports can be created at time intervals requested by the customer including quarterly, monthly and annually.

Sample Reports

on Iron Mountain Connect™ Report Center



REPORT NAME	REPORT DESCRIPTION	REPORT SAMPLE																																																																																																																																																																																																																		
Account List	Displays list of accounts, contact name, phone number, whether the department ID is validated, record code parameter, type of pickup validation, total files, total cartons, and total cubic footage.	<table border="1"> <thead> <tr> <th>Cust ID</th> <th>Customer Name</th> <th>Contact Name</th> <th>Phone</th> <th>Validate Dept</th> <th>Record Code</th> <th>Pickup Valid</th> <th>File Quantity</th> <th>Carton Quantity</th> <th>Cub Foot</th> </tr> </thead> <tbody> <tr> <td>CUST1</td> <td>CA001 INC</td> <td>John Smith</td> <td>(800) 000-0000</td> <td>YES</td> <td>1</td> <td>IM FACILITY</td> <td>0</td> <td>123</td> <td>147.6</td> </tr> <tr> <td>CUST2</td> <td>CA002 INC</td> <td>Mary Smith</td> <td>(866) 000-0000</td> <td>NO</td> <td>0</td> <td>NO VALIDA</td> <td>0</td> <td>3</td> <td>3.6</td> </tr> <tr> <td>CUST3</td> <td>CA003 INC</td> <td>Pat Smith</td> <td>(877) 000-0000</td> <td>YES</td> <td>2</td> <td>IM FACILITY</td> <td>0</td> <td>1,963</td> <td>3,053.07</td> </tr> <tr> <td>CUST4</td> <td>CA004 INC</td> <td>Brian Scott</td> <td>(888) 000-0000</td> <td>YES</td> <td>1</td> <td>IM FACILITY</td> <td>0</td> <td>123</td> <td>147.6</td> </tr> <tr> <td>CUST5</td> <td>CA005 INC</td> <td>Dan Mahor</td> <td>(899) 000-0000</td> <td>NO</td> <td>0</td> <td>NO VALIDA</td> <td>0</td> <td>3</td> <td>3.6</td> </tr> </tbody> </table>	Cust ID	Customer Name	Contact Name	Phone	Validate Dept	Record Code	Pickup Valid	File Quantity	Carton Quantity	Cub Foot	CUST1	CA001 INC	John Smith	(800) 000-0000	YES	1	IM FACILITY	0	123	147.6	CUST2	CA002 INC	Mary Smith	(866) 000-0000	NO	0	NO VALIDA	0	3	3.6	CUST3	CA003 INC	Pat Smith	(877) 000-0000	YES	2	IM FACILITY	0	1,963	3,053.07	CUST4	CA004 INC	Brian Scott	(888) 000-0000	YES	1	IM FACILITY	0	123	147.6	CUST5	CA005 INC	Dan Mahor	(899) 000-0000	NO	0	NO VALIDA	0	3	3.6																																																																																																																																																						
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IOD Order Detail Report	Displays Image On Demand™ order details, file description 1 and 2, date of request, imaged date, found status, customer ID, and division/department.	<table border="1"> <thead> <tr> <th>Cust ID</th> <th>Customer Name</th> <th>Division Id</th> <th>Departmen</th> <th>Ord Nbr</th> <th>Order Line</th> <th>Contact Na</th> <th>SKP Box Nb</th> <th>File Descrip</th> <th>File Descrip</th> <th>Request Da</th> <th>Imaged Dat</th> <th>Pages Scan</th> <th>Found</th> </tr> </thead> <tbody> <tr> <td>CUST1</td> <td>CA001 INC</td> <td>1111</td> <td>ADMIN</td> <td>1E+08</td> <td>1</td> <td>John Smith</td> <td>1.17E+08</td> <td>PZ245 150</td> <td>17460-202</td> <td>7/14/10</td> <td>7/15/10</td> <td>1</td> <td>Yes</td> </tr> <tr> <td>CUST1</td> <td>CA001 INC</td> <td>1111</td> <td>SALES</td> <td>1E+08</td> <td>1</td> <td>Mary Smith</td> <td>1.17E+08</td> <td>PZ481 310</td> <td>3061-01</td> <td>7/15/10</td> <td>7/16/10</td> <td>1</td> <td>Yes</td> </tr> <tr> <td>CUST1</td> <td>CA001 INC</td> <td>1111</td> <td>CSERVICE</td> <td>1E+08</td> <td>1</td> <td>Pat Smith</td> <td>1.17E+08</td> <td>PZ481 310</td> <td>3098-1 2 O</td> <td>7/16/10</td> <td>7/18/10</td> <td>1</td> <td>Yes</td> </tr> <tr> <td>CUST1</td> <td>CA001 INC</td> <td>1111</td> <td>SALES</td> <td>1E+08</td> <td>1</td> <td>Brian Scott</td> <td>1.85E+08</td> <td>CASE JUSTII</td> <td>178 20 945</td> <td>7/16/10</td> <td>7/19/10</td> <td>3</td> <td>Yes</td> </tr> <tr> <td>CUST1</td> <td>CA001 INC</td> <td>1111</td> <td>ADMIN</td> <td>1E+08</td> <td>2</td> <td>Dan Mahor</td> <td>1.85E+08</td> <td>FRANKLIN \</td> <td>12345-1</td> <td>8/13/10</td> <td>8/16/10</td> <td>2</td> <td>Yes</td> </tr> <tr> <td>CUST1</td> <td>CA001 INC</td> <td>1111</td> <td>CSERVICE</td> <td>1E+08</td> <td>1</td> <td>Trevor Krav</td> <td>1.85E+08</td> <td>FRANKLIN \</td> <td>12345-2</td> <td>8/13/10</td> <td>8/16/10</td> <td>1</td> <td>Yes</td> </tr> </tbody> </table>	Cust ID	Customer Name	Division Id	Departmen	Ord Nbr	Order Line	Contact Na	SKP Box Nb	File Descrip	File Descrip	Request Da	Imaged Dat	Pages Scan	Found	CUST1	CA001 INC	1111	ADMIN	1E+08	1	John Smith	1.17E+08	PZ245 150	17460-202	7/14/10	7/15/10	1	Yes	CUST1	CA001 INC	1111	SALES	1E+08	1	Mary Smith	1.17E+08	PZ481 310	3061-01	7/15/10	7/16/10	1	Yes	CUST1	CA001 INC	1111	CSERVICE	1E+08	1	Pat Smith	1.17E+08	PZ481 310	3098-1 2 O	7/16/10	7/18/10	1	Yes	CUST1	CA001 INC	1111	SALES	1E+08	1	Brian Scott	1.85E+08	CASE JUSTII	178 20 945	7/16/10	7/19/10	3	Yes	CUST1	CA001 INC	1111	ADMIN	1E+08	2	Dan Mahor	1.85E+08	FRANKLIN \	12345-1	8/13/10	8/16/10	2	Yes	CUST1	CA001 INC	1111	CSERVICE	1E+08	1	Trevor Krav	1.85E+08	FRANKLIN \	12345-2	8/13/10	8/16/10	1	Yes																																																																																																																
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REPORT NAME
REPORT DESCRIPTION

REPORT SAMPLE

<p>Records Management Trend</p>	<p>Displays total records management charges by division and department for a customer ID.</p>	<table border="1"> <thead> <tr> <th>Cust ID</th> <th>Division Id</th> <th>Division Na</th> <th>Departmen</th> <th>Departmen</th> <th>City</th> <th>State</th> <th>Zip</th> <th>9-Jan</th> <th>9-Feb</th> <th>9-Mar</th> <th>9-Apr</th> <th>9-May</th> <th>9-Jun</th> <th>9-Jul</th> <th>9-Aug</th> <th>9-Sep</th> <th>9-Oct</th> <th>9-Nov</th> <th>9-Dec</th> <th>10-Jan</th> <th>10-Feb</th> <th>10-Mar</th> <th>10-Apr</th> <th>10-May</th> <th>10-Jun</th> <th>10-Jul</th> <th>10-Sep</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>CUST1</td> <td>1111</td> <td>Headquar</td> <td>ADMIN</td> <td>ADMINISTR</td> <td>Boston</td> <td>MA</td> <td>1234</td> <td>287.6</td> <td>478.31</td> <td>163.38</td> <td>387.46</td> <td>1,427.47</td> <td>143.43</td> <td>214.64</td> <td>949.08</td> <td>1,245.86</td> <td>223.18</td> <td>1,309.94</td> <td>1,589.38</td> <td>432.86</td> <td>298.45</td> <td>350.79</td> <td>232.61</td> <td>413.36</td> <td>162.11</td> <td>22.2</td> <td>192</td> <td>10,524.11</td> </tr> <tr> <td>CUST1</td> <td>1111</td> <td>Headquar</td> <td>SALES</td> <td>SALES</td> <td>Boston</td> <td>MA</td> <td>1234</td> <td>5</td> <td>0</td> <td>25.1</td> <td>30.1</td> <td>20</td> <td>20</td> <td>20</td> <td>39.61</td> <td>40</td> <td>40</td> <td>40</td> <td>40</td> <td>40</td> <td>40</td> <td>40</td> <td>2</td> <td>2</td> <td>0</td> <td>0</td> <td>40</td> <td>407.81</td> </tr> <tr> <td>CUST1</td> <td>1111</td> <td>Headquar</td> <td>CSERVICE</td> <td>CUSTOMER</td> <td>Boston</td> <td>MA</td> <td>1234</td> <td>4</td> <td>1</td> <td>10</td> <td>2</td> <td>5</td> <td>10</td> <td>11</td> <td>20.5</td> <td>31</td> <td>2</td> <td>2</td> <td>2</td> <td>2</td> <td>2</td> <td>40</td> <td>45</td> <td>45</td> <td>70</td> <td>70.5</td> <td>3</td> <td>48</td> <td>424</td> </tr> <tr> <td>CUST1</td> <td>1111</td> <td>Headquar</td> <td>SALES</td> <td>SALES</td> 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<td>534</td> <td>504</td> <td>504</td> <td>659</td> <td>516</td> <td>533</td> <td>22.2</td> <td>0</td> <td>3,473.00</td> </tr> <tr> <td>CUST1</td> <td>1112</td> <td>Boston</td> <td>HR</td> <td>HUMAN RE</td> <td>Boston</td> <td>MA</td> <td>1234</td> <td>22.2</td> <td>1</td> <td>3</td> <td>10</td> <td>3</td> <td>0</td> <td>2</td> <td>20</td> <td>0</td> <td>0</td> <td>0</td> <td>192</td> <td>384</td> <td>384</td> <td>384</td> <td>480</td> <td>384</td> <td>328</td> <td>384</td> <td>3</td> <td>2,984.20</td> </tr> <tr> <td>CUST1</td> <td>1112</td> <td>Boston</td> <td>FIELD</td> <td>FIELD SUPP</td> <td>Boston</td> <td>MA</td> <td>1234</td> <td>23.3</td> <td>10</td> <td>0</td> <td>2</td> <td>20</td> <td>0</td> <td>5</td> <td>21.2</td> <td>0</td> <td>10</td> <td>0</td> <td>40</td> <td>40</td> <td>80</td> <td>40</td> <td>147.5</td> <td>0</td> <td>0</td> <td>80</td> <td>20</td> <td>539</td> </tr> <tr> <td>CUST1</td> <td>1113</td> <td>Warehouse</td> <td>CSERVICE</td> <td>CUSTOMER</td> 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<td>62.5</td> <td>76</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>716.71</td> </tr> </tbody> </table>	Cust ID	Division Id	Division 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RE	Boston	MA	1234	22.2	1	3	10	3	0	2	20	0	0	0	192	384	384	384	480	384	328	384	3	2,984.20	CUST1	1112	Boston	FIELD	FIELD SUPP	Boston	MA	1234	23.3	10	0	2	20	0	5	21.2	0	10	0	40	40	80	40	147.5	0	0	80	20	539	CUST1	1113	Warehouse	CSERVICE	CUSTOMER	Collegewi	PA	1023	24.4	21.2	1	5	21.2	1	4	22.2	0	0	0	48	48	100	48	48	48	48	100	21.2	609.2	CUST1	1113	Warehouse	FIELD	FIELD SUPP	Collegewi	PA	1023	25.5	22.2	10	4	22.2	10	0	10	10	0	0	84	168	168	168	220.5	169.5	178.5	168	22.2	1,460.60	CUST1	1113	Warehouse	IT	INFORMATI	Collegewi	PA	1023	26.6	23.3	0	0	10	478.31	0	0	20	20	0	62.5	76	0	0	0	0	0	0	0	716.71
Cust ID	Division Id	Division Na	Departmen	Departmen	City	State	Zip	9-Jan	9-Feb	9-Mar	9-Apr	9-May	9-Jun	9-Jul	9-Aug	9-Sep	9-Oct	9-Nov	9-Dec	10-Jan	10-Feb	10-Mar	10-Apr	10-May	10-Jun	10-Jul	10-Sep	Total																																																																																																																																																																																																																																																																																																																																						
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Da	Destruction	Destruction	Carton Stat	Cubic Feet	Special File	Transmitta	Event Date	Hold Code	Hold Code	Description	CUST1	1111	Headquar	ADMINISTR	ADMINISTR	GDBR999	GENL DISTR	1.17E+09	2.17E+09	P245	150	17460-202	P2828016	CLOSING	CA112A	X129A	1/1/00	4/1/00	3/19/06			INDEFINITE	Permanent	1.2	FIL	YES				CUST1	1111	Headquar	SALES	GDBR999	GENL DISTR	1.17E+09	2.17E+09	P2481	310	3098.1	2	DISCOVERED	SENT FOR S	CA12A	X129A	1/1/01	4/1/01	6/1/06	4/30/11		Checked Q	1.2	FIL	YES	4/28/10			CUST1	1111	Headquar	CUSTOMER	GDBR999	GENL DISTR	1.17E+09	2.17E+09	P2481	310	3098.1	2	DISCOVERED	SENT FOR S	CA12A	X129A	1/1/02	4/1/02	3/19/06			INDEFINITE	Permanent	1.2	LON	YES				CUST1	1111	Headquar	SALES	NON999	NON999	1.85E+09	3.85E+09	CASE JUSTI	178	20	945	DISCOVERY	CLOSING	CB12X12	SR40R3	1/1/03	4/1/03	6/1/06	7/1/04		At Iron Mt	1.2	LON	YES	5/21/10	*00	(Multiple Hold Codes)	CUST1	1001	Boston	ADMINISTR	ADMINISTR	NON999	NON999	1.85E+09	3.85E+09	FRANKLIN	12345-1		DISCOVERY	CLOSING	CB12X12	SR40R3	1/1/04	4/1/04	7/12/08	10/12/91		Permanent	1.2	LON	YES		HC	HOLD CODE	CUST1	1001	Boston	CUSTOMER	CUSTOMER	NON999	NON999	1.85E+09	3.85E+09	FRANKLIN	12345-2		ADDING	FIL SENT FOR S	CB12X12	SR40R3	1/1/05	4/1/05	3/5/09	2/5/18		Permanent	1.2	LON	YES	7/13/10			CUST1	1001	Boston	HUMAN RE	HUMAN RE	NON999	NON999	1.85E+09	3.85E+09	RVC CORP	ACCOUNTS	DESC 4	BOX SENT FOR S	CB12X12	SR40R3	1/1/06	4/1/06	6/7/07			INDEFINITE	Permanent	1.2	LON	YES		4	TESTING	CUST1	1001	Boston	FIELD SUPP	FIELD SUPP	NON999	NON999	1.76E+09	2.76E+09	TRANSMIT	SAMPLE	0501-14	CLOSING	D234P	LO4MN	1/1/07	4/1/07	6/11/09			INDEFINITE	Permanent	1.2	LON	YES				CUST1	1002	Warehouse	CUSTOMER	CUSTOMER	TBC999	TBC999	2.74E+09	4.74E+09	35683721	LEGAL FILE	17460-202	DISCOVERY	D234P	LO4MN	1/1/08	4/1/08	12/18/09	3/18/93		Checked Q	1.2	LON	YES	7/23/10	*00	(Multiple Hold Codes)	CUST1	1002	Warehouse	FIELD SUPP	FIELD 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F	8/24/10	32-GAL	SHREDDING	326704	3	CALL RECEPTION	CUST1	CA001 INC	1111	SALES	OFFICE	1000 CAMI	4TH FLR	-SALES	COLLEGEVI	PA	19426	system.supp	MROBINSO	4/18/10	Matt Robin	ACTIVE		MED	Annually	Every 12 M	4/18/11	16-GAL	SHREDDING	316905	1	CALL RECEPTION	CUST1	CA001 INC	1111	CSERVICE	OFFICE	1000 CAMI	3TH FLR	-SERVICE	COLLEGEVI	PA	19426	system.supp	JEE	6/3/10	Jake Lee	ACTIVE		OFF	Twice Weel on MON an	8/26/10	16-GAL	SHREDDING	313981	6	CALL RECEPTION	CUST1	CA001 INC	1111	SALES	OFFICE	1000 CAMI	4TH FLR	-SALES	COLLEGEVI	PA	19426	system.supp	BSCOTT	6/3/10	Brian Scott	ACTIVE		OFF	Twice Weel on MON an	8/26/10	32-GAL	SHREDDING	313981	1	CALL RECEPTION	CUST1	CA001 INC	1112	ADMIN	OFFICE	1000 CAMI	1ST FLR	-ADMIN	COLLEGEVI	PA	19426	system.supp	DMAHONE	1/12/10	Dan Mahor	ACTIVE		PKU	Quarterly	Every 90 da	10/9/10	16-GAL	SHREDDING	306454	1	CALL RECEPTION	CUST1	CA001 INC	1112	CSERVICE	OFFICE	1000 CAMI	3TH FLR	-SERVICE	COLLEGEVI	PA	19426	system.supp	TKRAYCIC	8/19/09	Trevor Krac	ACTIVE		RESET TO AI RTN	Annually	Every 12 M	12/31/10	32-GAL	SHREDDING	319826	4	CALL RECEPTION	CUST1	CA001 INC	1112	HR	OFFICE	1000 CAMI	3TH FLR	-SERVICE	COLLEGEVI	PA	19426	system.supp	RWILSON	5/5/10	Alphonso V	ACTIVE		OFF	Twice Weel	Every 1ST and T	9/1/10	32-GAL	SHREDDING	319726	2	CALL RECEPTION	CUST1	CA001 INC	1112	FIELD	OFFICE	1000 CAMI	3RD FLR	-CONTRACTS	COLLEGEVI	PA	19426	system.supp	RWILSON	4/18/10	Richard Wi	ACTIVE		MED	Daily	Monday - F	8/24/10	32-GAL	SHREDDING	316903	3	CALL RECEPTION	CUST1	CA001 INC	1113	CSERVICE	OFFICE	1000 CAMI	3TH FLR	-SERVICE	COLLEGEVI	PA	19426	system.supp	RMACK	4/18/10	Randy Maci	ACTIVE		MED	Daily	Monday - F	8/24/10	16-GAL	SHREDDING	316903	4	CALL RECEPTION	CUST1	CA001 INC	1113	FIELD	OFFICE	1000 CAMI	3TH FLR	-SERVICE	COLLEGEVI	PA	19426	system.supp	TKRAYCIC	4/18/10	Trevor Krac	ACTIVE		MED	Daily	Monday - F	8/24/10	16-GAL	SHREDDING	316903	5	CALL RECEPTION	CUST1	CA001 INC	1113	IT	OFFICE	1000 CAMI	1ST FLR	-IT SUPPORT	COLLEGEVI	PA	19426	system.supp	AWILSON	4/18/10	Alphonso V	ACTIVE		OFF	Twice Weel on MON an	8/26/10	32-GAL	SHREDDING	313981	1	CALL RECEPTION																																										
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<p>Carton Date Summary</p>	<p>Displays total cartons for destruction review, event date, create date, to/from date, and year by customer ID.</p>	<table border="1"> <thead> <tr> <th>Customer I</th> <th>Customer</th> <th>Year</th> <th>From Date</th> <th>To Date</th> <th>Create Date</th> <th>Event Date</th> <th>Receipt Da</th></tr></thead></table>	Customer I	Customer	Year	From Date	To Date	Create Date	Event Date	Receipt Da																																																																																																																																																																																																																																																																																																																																																								
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EXHIBIT B

FEE PROPOSAL

2. Cost Proposal

Iron Mountain has presented two cost proposals based on the instructions to include a cost proposal that allows permanent removal (withdrawal) fees and a cost proposal that does not allow permanent removal (withdrawal) fees.

2.1 Cost Proposal with Permanent Removal (Withdrawal) Fees Allowed

CLIN	Standard Storage and Services						
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0001	Carton Storage	\$0.231	\$0.231	\$0.231	\$0.254	\$0.267	Cubic Foot
0002	Carton Storage, New	\$0.231	\$0.231	\$0.231	\$0.254	\$0.267	Cubic Foot
0003	Receiving and Entering - Carton	\$1.83	\$1.83	\$1.83	\$2.01	\$2.11	Cubic Foot
0004	Regular Retrieval - Carton	\$2.19	\$2.19	\$2.19	\$2.41	\$2.53	Cubic Foot
0005	Regular Retrieval - File from Carton	\$3.08	\$3.08	\$3.08	\$3.39	\$3.56	File
0006	Regular Refile - Carton	\$2.19	\$2.19	\$2.19	\$2.41	\$2.53	Cubic Foot
0007	Regular Refile - File to Carton	\$3.08	\$3.08	\$3.08	\$3.39	\$3.56	File
0008	Archival Destruction - Carton	\$2.78	\$2.78	\$2.78	\$3.06	\$3.21	CF plus Regular Retrieval Charge and Handling Charge
0009	Standard Delivery	\$21.54	\$21.54	\$21.54	\$23.69	\$24.87	Visit plus Handling Charge
0010	Standard Pickup	\$21.54	\$21.54	\$21.54	\$23.69	\$24.87	Visit plus Handling Charge
0011	Handling Charge	\$3.00	\$3.00	\$3.00	\$3.30	\$3.47	Cubic Foot
0012	Trip Charge, Standard Delivery, Zone 2	\$39.90	\$39.90	\$39.90	\$43.89	\$46.08	Visit plus Handling Charge
0013	Trip Charge, Standard Delivery, Zone 3	\$46.02	\$46.02	\$46.02	\$50.62	\$53.15	Visit plus Handling Charge
0014	Trip Charge, Standard Delivery, Zone 4	\$52.14	\$52.14	\$52.14	\$57.35	\$60.22	Visit plus Handling Charge
0015	Trip Charge, Standard Delivery, Zone Metro	\$28.68	\$28.68	\$28.68	\$31.55	\$33.13	Visit plus Handling Charge
0016	Trip Charge, Standard Delivery, Zone Metro NY	\$36.84	\$36.84	\$36.84	\$40.52	\$42.55	Visit plus Handling Charge
0017	Trip Charge, Standard Pickup, Zone 2	\$39.90	\$39.90	\$39.90	\$43.89	\$46.08	Visit plus Handling Charge
0018	Trip Charge, Standard Pickup, Zone 3	\$46.02	\$46.02	\$46.02	\$50.62	\$53.15	Visit plus Handling Charge
0019	Trip Charge, Standard Pickup, Zone 4	\$52.14	\$52.14	\$52.14	\$57.35	\$60.22	Visit plus Handling Charge
0020	Trip Charge, Standard Pickup, Zone Metro	\$28.68	\$28.68	\$28.68	\$31.55	\$33.13	Visit plus Handling Charge

0021	Trip Charge, Standard Pickup, Zone Metro NY	\$36.84	\$36.84	\$36.84	\$40.52	\$42.55	Visit plus Handling Charge
CLIN Premium Storage and Services							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0022	Archival Destruction - File from Carton	\$2.61	\$2.61	\$2.61	\$2.87	\$3.01	File plus Regular Retrieval Charge and Handling Charge
0023	Permanent Withdrawal - File from Carton	\$3.96	\$3.96	\$3.96	\$4.36	\$4.58	File plus Regular Retrieval Charge
0024	Permanent Withdrawal - Carton	\$4.39	\$4.39	\$4.39	\$4.83	\$5.07	CF plus Regular Retrieval Charge
0025	Rush Retrieval - Carton	\$8.53	\$8.53	\$8.53	\$9.38	\$9.85	Cubic Foot
0026	Rush Retrieval - File from Carton	\$11.37	\$11.37	\$11.37	\$12.51	\$13.14	File
0027	Regular Interfile - Carton	\$10.37	\$10.37	\$10.37	\$11.41	\$11.98	Each
0028	Rush Delivery - Business Day	\$65.57	\$65.57	\$65.57	\$72.13	\$75.74	Visit plus Handling Charge
0029	Rush Pickup - Business Day	\$65.57	\$65.57	\$65.57	\$72.13	\$75.74	Visit plus Handling Charge
0030	Rush Delivery - Weekends/Holidays/After Hours	\$331.50	\$331.50	\$331.50	\$364.65	\$382.88	Visit plus Handling Charge
0031	Miscellaneous Services - Labor	\$76.52	\$76.52	\$76.52	\$84.17	\$88.38	Hour
0032	Re-boxing Charge	\$6.57	\$6.57	\$6.57	\$7.23	\$7.59	Labor Plus New Carton
0033	Re-lid Charge	\$2.78	\$2.78	\$2.78	\$3.06	\$3.21	Labor Plus New Lid
CLIN Other Program Fees							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0034	Administrative Fee (Summary Billing)	Waived	Waived	Waived	Waived	Waived	Account ID per Month
0035	Administrative Fee (Detailed Billing)	Waived	Waived	Waived	Waived	Waived	Account ID per Month
0036	Fuel Surcharge	Waived	Waived	Waived	Waived	Waived	Transportation Visit
CLIN Custom Storage and Services							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0037	Outside Courier/Customer Representative Handling	\$6.910	\$6.910	\$6.910	\$7.601	\$7.981	Each

0038	Storage Minimum	\$207.930	\$207.930	\$207.930	\$228.723	\$240.159	Account ID per Month
0039	Minimum Service Order Charge	\$17.560	\$17.560	\$17.560	\$19.316	\$20.282	Order
0040	Individual List/Indexing	\$0.893	\$0.893	\$0.893	\$0.982	\$1.031	File
0041	RFID Z Label	\$0.672	\$0.672	\$0.672	\$0.739	\$0.776	Each
0042	RFID T Label	\$0.672	\$0.672	\$0.672	\$0.739	\$0.776	Each
0043	Standard Letter/Legal	\$4.790	\$4.790	\$4.790	\$5.269	\$5.532	Each
0044	Auto-Fold Letter/Legal	\$6.520	\$6.520	\$6.520	\$7.172	\$7.531	Each
0045	#251 Std Attached Lid	\$4.400	\$4.400	\$4.400	\$4.840	\$5.082	Each
0046	Miscellaneous RM Labor	\$75.000	\$75.000	\$75.000	\$82.500	\$86.625	Hour
CLIN Image on Demand							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0047	Image on Demand File Scan (includes first 15 pages)	\$6.14	\$6.14	\$6.14	\$6.75	\$7.09	File + Regular Retrieval and Refile
0048	Digital Images Scanned (in excess of cap)	\$0.22	\$0.22	\$0.22	\$0.24	\$0.25	Image
0049	Image Transmission - Next Day	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Order
0050	Image Transmission - Half Day	\$33.37	\$33.37	\$33.37	\$36.71	\$38.55	Order
0051	Image Transmission - After Hours, Holiday, Weekend	\$168.41	\$168.41	\$168.41	\$185.25	\$194.51	Order
0052	Order Minimum (Image on Demand)	\$26.29	\$26.29	\$26.29	\$28.92	\$30.37	Order
CLIN Document Conversion							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0053	Standard Scanning - Minimum Fee	\$400.000	\$400.000	\$400.000	\$400.000	\$400.000	Project
0054	Standard Scanning - Tier 1 (Up to 10,000 images)	\$0.097	\$0.097	\$0.097	\$0.107	\$0.112	Image
0055	Standard Scanning - Tier 2 (10,001 - 49,999 images)	\$0.078	\$0.078	\$0.078	\$0.086	\$0.090	Image
0056	Standard Scanning - Tier 3 (50,000 - 1,999,999 images)	\$0.065	\$0.065	\$0.065	\$0.072	\$0.075	Image
0057	Standard Scanning - Tier 4 (2,000,000 - 4,999,999 images)	\$0.059	\$0.059	\$0.059	\$0.065	\$0.068	Image

0058	Flatbed Scanning - Minimum Fee	\$2,500.000	\$2,500.000	\$2,500.000	\$2,500.000	\$2,500.000	Project
0059	Flatbed Scanning	\$0.539	\$0.539	\$0.539	\$0.593	\$0.623	Image
0060	Color Setup	\$384.760	\$384.760	\$384.760	\$423.236	\$465.560	Project
0061	Document Preparation - Light	\$0.022	\$0.022	\$0.022	\$0.024	\$0.025	Image
0062	Document Preparation - Standard	\$0.040	\$0.040	\$0.040	\$0.044	\$0.046	Image
0063	Document Preparation - Heavy	\$0.080	\$0.080	\$0.080	\$0.088	\$0.092	Image
0064	Document Reassembly - Simple	\$0.004	\$0.004	\$0.004	\$0.004	\$0.004	Image
0065	Document Reassembly - Partial	\$0.017	\$0.017	\$0.017	\$0.019	\$0.020	Image
0066	Document Reassembly - Full	\$0.041	\$0.041	\$0.041	\$0.045	\$0.047	Image
0067	Scan Resolution - Standard (300 DPI)	\$0.006	\$0.006	\$0.006	\$0.007	\$0.007	Image
0068	Quality Assurance - 100% vs. Image	\$0.038	\$0.038	\$0.038	\$0.042	\$0.044	Image
0069	Quality Assurance - With Clean-up	\$0.011	\$0.011	\$0.011	\$0.012	\$0.013	Image
0070	Image Output - Searchable PDF	\$0.005	\$0.005	\$0.005	\$0.006	\$0.006	Image
0071	Indexing - Standard	\$0.008	\$0.008	\$0.008	\$0.009	\$0.009	Keystroke
0072	Indexing - Flatbed	\$0.011	\$0.011	\$0.011	\$0.012	\$0.013	Keystroke
0073	Document Classification - Standard 2-5 Doc Types	\$0.004	\$0.004	\$0.004	\$0.004	\$0.004	Image
0074	Document Classification - Standard 6-10 Doc Types	\$0.007	\$0.007	\$0.007	\$0.008	\$0.008	Image
0075	Document Classification - Standard 11-25 Doc Types	\$0.013	\$0.013	\$0.013	\$0.014	\$0.015	Image
0076	Document Classification - Flatbed 2-5 Doc Types	\$0.014	\$0.014	\$0.014	\$0.015	\$0.016	Image
0077	Document Classification - Flatbed 6-10 Doc Types	\$0.037	\$0.037	\$0.037	\$0.041	\$0.043	Image
0078	Document Classification - Flatbed 11-25 Doc Types	\$0.067	\$0.067	\$0.067	\$0.074	\$0.078	Image
0079	Wide Format B Scanning - Minimum Fee	\$4,300.000	\$4,300.000	\$4,300.000	\$4,730.000	\$4,966.500	Project
0080	Wide Format B Scanning (Up to 12 x 18)	\$0.979	\$0.979	\$0.979	\$1.077	\$1.131	Image
0081	Document Preparation - Light - Wide Format	\$0.100	\$0.100	\$0.100	\$0.110	\$0.116	Image
0082	Document Preparation - Standard - Wide Format	\$0.509	\$0.509	\$0.509	\$0.560	\$0.588	Image

0083	Document Preparation - Heavy - Wide Format	\$1.263	\$1.263	\$1.263	\$1.389	\$1.458	Image
0084	Document Reassembly - Simple - Wide Format	\$0.049	\$0.049	\$0.049	\$0.054	\$0.057	Image
0085	Document Reassembly - Partial - Wide Format	\$0.105	\$0.105	\$0.105	\$0.116	\$0.122	Image
0086	Document Reassembly - Full - Wide Format	\$0.267	\$0.267	\$0.267	\$0.294	\$0.309	Image
0087	Scan Resolution - Wide Format B (300 DPI)	\$0.690	\$0.690	\$0.690	\$0.759	\$0.797	Image
0088	Quality Assurance - 100% vs. Image - Wide Format	\$0.029	\$0.029	\$0.029	\$0.032	\$0.034	Image
0089	Quality Assurance - With Clean-up - Wide Format	\$0.006	\$0.006	\$0.006	\$0.007	\$0.007	Image
0090	Image Output - Searchable PDF - Wide Format	\$0.005	\$0.005	\$0.005	\$0.006	\$0.006	Image
0091	Indexing - Wide Format	\$0.010	\$0.010	\$0.010	\$0.011	\$0.012	Keystroke
CLIN	Document Conversion Labor Categories						
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0092	Imaging Data Entry Specialist	\$41.88	\$41.88	\$41.88	\$46.07	\$48.37	Hour
0093	Imaging Operations	\$99.35	\$99.35	\$99.35	\$109.29	\$114.75	Hour
0094	Imaging Production Coordinator	\$56.98	\$56.98	\$56.98	\$62.68	\$65.81	Hour
0095	Imaging Production Specialist I	\$39.51	\$39.51	\$39.51	\$43.46	\$45.63	Hour
0096	Imaging Production Specialist II	\$41.71	\$41.71	\$41.71	\$45.88	\$48.17	Hour
0097	Imaging Production Supervisor	\$64.80	\$64.80	\$64.80	\$71.28	\$74.84	Hour
0098	Implementation Manager - DMS	\$102.81	\$102.81	\$102.81	\$113.09	\$118.74	Hour
0099	Software Engineer	\$124.23	\$124.23	\$124.23	\$136.65	\$143.48	Hour
0100	Principal Software Engineer	\$148.53	\$148.53	\$148.53	\$163.38	\$171.55	Hour
CLIN	InSight Content Services Platform Base Package						
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0101	Annual User Subscription - Base Package (25 Users)	\$9,000.00	\$9,000.00	\$9,000.00	\$9,900.00	\$10,395.00	25 Users
0102	Overage Fees Per User Per Month	\$30.00	\$30.00	\$30.00	\$33.00	\$34.65	Month

0103	Annual Content Under Management Subscription - Base Package (500 GBs Storage)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	GBs
0104	Overage Fees Per 500 GBs Per Month	\$500.00	\$500.00	\$500.00	\$550.00	\$577.50	Month
0105	Professional Services (Estimated T&M)	\$260.00	\$260.00	\$260.00	\$286.00	\$300.30	Hour
0106	One-Time Setup	\$15,600.00	\$15,600.00	\$15,600.00	\$17,160.00	\$18,018.00	Setup

2.2 Cost Proposal with No Permanent Removal (Withdrawal) Fees Allowed

CLIN	Standard Storage and Services						
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0001	Carton Storage	\$0.291	\$0.291	\$0.291	\$0.320	\$0.335	Cubic Foot
0002	Carton Storage, New	\$0.291	\$0.291	\$0.291	\$0.320	\$0.335	Cubic Foot
0003	Receiving and Entering - Carton	\$1.83	\$1.83	\$1.83	\$2.01	\$2.11	Cubic Foot
0004	Regular Retrieval - Carton	\$2.19	\$2.19	\$2.19	\$2.41	\$2.53	Cubic Foot
0005	Regular Retrieval - File from Carton	\$3.08	\$3.08	\$3.08	\$3.39	\$3.56	File
0006	Regular Refile - Carton	\$2.19	\$2.19	\$2.19	\$2.41	\$2.53	Cubic Foot
0007	Regular Refile - File to Carton	\$3.08	\$3.08	\$3.08	\$3.39	\$3.56	File
0008	Archival Destruction - Carton	\$2.78	\$2.78	\$2.78	\$3.06	\$3.21	CF plus Regular Retrieval Charge and Handling Charge
0009	Standard Delivery	\$21.54	\$21.54	\$21.54	\$23.69	\$24.87	Visit plus Handling Charge
0010	Standard Pickup	\$21.54	\$21.54	\$21.54	\$23.69	\$24.87	Visit plus Handling Charge
0011	Handling Charge	\$3.00	\$3.00	\$3.00	\$3.30	\$3.47	Cubic Foot
0012	Trip Charge, Standard Delivery, Zone 2	\$39.90	\$39.90	\$39.90	\$43.89	\$46.08	Visit plus Handling Charge
0013	Trip Charge, Standard Delivery, Zone 3	\$46.02	\$46.02	\$46.02	\$50.62	\$53.15	Visit plus Handling Charge
0014	Trip Charge, Standard Delivery, Zone 4	\$52.14	\$52.14	\$52.14	\$57.35	\$60.22	Visit plus Handling Charge

0015	Trip Charge, Standard Delivery, Zone Metro	\$28.68	\$28.68	\$28.68	\$31.55	\$33.13	Visit plus Handling Charge
0016	Trip Charge, Standard Delivery, Zone Metro NY	\$36.84	\$36.84	\$36.84	\$40.52	\$42.55	Visit plus Handling Charge
0017	Trip Charge, Standard Pickup, Zone 2	\$39.90	\$39.90	\$39.90	\$43.89	\$46.08	Visit plus Handling Charge
0018	Trip Charge, Standard Pickup, Zone 3	\$46.02	\$46.02	\$46.02	\$50.62	\$53.15	Visit plus Handling Charge
0019	Trip Charge, Standard Pickup, Zone 4	\$52.14	\$52.14	\$52.14	\$57.35	\$60.22	Visit plus Handling Charge
0020	Trip Charge, Standard Pickup, Zone Metro	\$28.68	\$28.68	\$28.68	\$31.55	\$33.13	Visit plus Handling Charge
0021	Trip Charge, Standard Pickup, Zone Metro NY	\$36.84	\$36.84	\$36.84	\$40.52	\$42.55	Visit plus Handling Charge
CLIN	Premium Storage and Services						
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0022	Archival Destruction - File from Carton	\$2.61	\$2.61	\$2.61	\$2.87	\$3.01	File plus Regular Retrieval Charge and Handling Charge
0023	Rush Retrieval - Carton	\$8.53	\$8.53	\$8.53	\$9.38	\$9.85	Cubic Foot
0024	Rush Retrieval - File from Carton	\$11.37	\$11.37	\$11.37	\$12.51	\$13.14	File
0025	Regular Interfile - Carton	\$10.37	\$10.37	\$10.37	\$11.41	\$11.98	Each
0026	Rush Delivery - Business Day	\$65.57	\$65.57	\$65.57	\$72.13	\$75.74	Visit plus Handling Charge
0027	Rush Pickup - Business Day	\$65.57	\$65.57	\$65.57	\$72.13	\$75.74	Visit plus Handling Charge
0028	Rush Delivery - Weekends/Holidays/After Hours	\$331.50	\$331.50	\$331.50	\$364.65	\$382.88	Visit plus Handling Charge
0029	Miscellaneous Services - Labor	\$76.52	\$76.52	\$76.52	\$84.17	\$88.38	Hour
0030	Re-boxing Charge	\$6.57	\$6.57	\$6.57	\$7.23	\$7.59	Labor Plus New Carton
0031	Re-lid Charge	\$2.78	\$2.78	\$2.78	\$3.06	\$3.21	Labor Plus New Lid

CLIN Other Program Fees							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0032	Administrative Fee (Summary Billing)	Waived	Waived	Waived	Waived	Waived	Account ID per Month
0033	Administrative Fee (Detailed Billing)	Waived	Waived	Waived	Waived	Waived	Account ID per Month
0034	Fuel Surcharge	Waived	Waived	Waived	Waived	Waived	Transportation Visit
CLIN Custom Storage and Services							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0035	Outside Courier/Customer Representative Handling	\$6.910	\$6.910	\$6.910	\$7.601	\$7.981	Each
0036	Storage Minimum	\$207.930	\$207.930	\$207.930	\$228.723	\$240.159	Account ID per Month
0037	Minimum Service Order Charge	\$17.560	\$17.560	\$17.560	\$19.316	\$20.282	Order
0038	Individual List/Indexing	\$0.893	\$0.893	\$0.893	\$0.982	\$1.031	File
0039	RFID Z Label	\$0.672	\$0.672	\$0.672	\$0.739	\$0.776	Each
0040	RFID T Label	\$0.672	\$0.672	\$0.672	\$0.739	\$0.776	Each
0041	Standard Letter/Legal	\$4.790	\$4.790	\$4.790	\$5.269	\$5.532	Each
0042	Auto-Fold Letter/Legal	\$6.520	\$6.520	\$6.520	\$7.172	\$7.531	Each
0043	#251 Std Attached Lid	\$4.400	\$4.400	\$4.400	\$4.840	\$5.082	Each
0044	Miscellaneous RM Labor	\$75.000	\$75.000	\$75.000	\$82.500	\$86.625	Hour
CLIN Image on Demand							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0045	Image on Demand File Scan (includes first 15 pages)	\$6.14	\$6.14	\$6.14	\$6.75	\$7.09	File + Regular Retrieval and Refile
0046	Digital Images Scanned (in excess of cap)	\$0.22	\$0.22	\$0.22	\$0.24	\$0.25	Image
0047	Image Transmission - Next Day	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Order

0048	Image Transmission - Half Day	\$33.37	\$33.37	\$33.37	\$36.71	\$38.55	Order
0049	Image Transmission - After Hours, Holiday, Weekend	\$168.41	\$168.41	\$168.41	\$185.25	\$194.51	Order
0050	Order Minimum (Image on Demand)	\$26.29	\$26.29	\$26.29	\$28.92	\$30.37	Order
CLIN	Document Conversion						
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0051	Standard Scanning - Minimum Fee	\$400.000	\$400.000	\$400.000	\$400.000	\$400.000	Project
0052	Standard Scanning - Tier 1 (Up to 10,000 images)	\$0.097	\$0.097	\$0.097	\$0.107	\$0.112	Image
0053	Standard Scanning - Tier 2 (10,001 - 49,999 images)	\$0.078	\$0.078	\$0.078	\$0.086	\$0.090	Image
0054	Standard Scanning - Tier 3 (50,000 - 1,999,999 images)	\$0.065	\$0.065	\$0.065	\$0.072	\$0.075	Image
0055	Standard Scanning - Tier 4 (2,000,000 - 4,999,999 images)	\$0.059	\$0.059	\$0.059	\$0.065	\$0.068	Image
0056	Flatbed Scanning - Minimum Fee	\$2,500.000	\$2,500.000	\$2,500.000	\$2,500.000	\$2,500.000	Project
0057	Flatbed Scanning	\$0.539	\$0.539	\$0.539	\$0.593	\$0.623	Image
0058	Color Setup	\$384.760	\$384.760	\$384.760	\$423.236	\$465.560	Project
0059	Document Preparation - Light	\$0.022	\$0.022	\$0.022	\$0.024	\$0.025	Image
0060	Document Preparation - Standard	\$0.040	\$0.040	\$0.040	\$0.044	\$0.046	Image
0061	Document Preparation - Heavy	\$0.080	\$0.080	\$0.080	\$0.088	\$0.092	Image
0062	Document Reassembly - Simple	\$0.004	\$0.004	\$0.004	\$0.004	\$0.004	Image
0063	Document Reassembly - Partial	\$0.017	\$0.017	\$0.017	\$0.019	\$0.020	Image
0064	Document Reassembly - Full	\$0.041	\$0.041	\$0.041	\$0.045	\$0.047	Image
0065	Scan Resolution - Standard (300 DPI)	\$0.006	\$0.006	\$0.006	\$0.007	\$0.007	Image
0066	Quality Assurance - 100% vs. Image	\$0.038	\$0.038	\$0.038	\$0.042	\$0.044	Image
0067	Quality Assurance - With Clean-up	\$0.011	\$0.011	\$0.011	\$0.012	\$0.013	Image
0068	Image Output - Searchable PDF	\$0.005	\$0.005	\$0.005	\$0.006	\$0.006	Image

0069	Indexing - Standard	\$0.008	\$0.008	\$0.008	\$0.009	\$0.009	Keystroke
0070	Indexing - Flatbed	\$0.011	\$0.011	\$0.011	\$0.012	\$0.013	Keystroke
0071	Document Classification - Standard 2-5 Doc Types	\$0.004	\$0.004	\$0.004	\$0.004	\$0.004	Image
0072	Document Classification - Standard 6-10 Doc Types	\$0.007	\$0.007	\$0.007	\$0.008	\$0.008	Image
0073	Document Classification - Standard 11-25 Doc Types	\$0.013	\$0.013	\$0.013	\$0.014	\$0.015	Image
0074	Document Classification - Flatbed 2-5 Doc Types	\$0.014	\$0.014	\$0.014	\$0.015	\$0.016	Image
0075	Document Classification - Flatbed 6-10 Doc Types	\$0.037	\$0.037	\$0.037	\$0.041	\$0.043	Image
0076	Document Classification - Flatbed 11-25 Doc Types	\$0.067	\$0.067	\$0.067	\$0.074	\$0.078	Image
0077	Wide Format B Scanning - Minimum Fee	\$4,300.000	\$4,300.000	\$4,300.000	\$4,730.000	\$4,966.500	Project
0078	Wide Format B Scanning (Up to 12 x 18)	\$0.979	\$0.979	\$0.979	\$1.077	\$1.131	Image
0079	Document Preparation - Light - Wide Format	\$0.100	\$0.100	\$0.100	\$0.110	\$0.116	Image
0080	Document Preparation - Standard - Wide Format	\$0.509	\$0.509	\$0.509	\$0.560	\$0.588	Image
0081	Document Preparation - Heavy - Wide Format	\$1.263	\$1.263	\$1.263	\$1.389	\$1.458	Image
0082	Document Reassembly - Simple - Wide Format	\$0.049	\$0.049	\$0.049	\$0.054	\$0.057	Image
0083	Document Reassembly - Partial - Wide Format	\$0.105	\$0.105	\$0.105	\$0.116	\$0.122	Image
0084	Document Reassembly - Full - Wide Format	\$0.267	\$0.267	\$0.267	\$0.294	\$0.309	Image
0085	Scan Resolution - Wide Format B (300 DPI)	\$0.690	\$0.690	\$0.690	\$0.759	\$0.797	Image
0086	Quality Assurance - 100% vs. Image - Wide Format	\$0.029	\$0.029	\$0.029	\$0.032	\$0.034	Image
0087	Quality Assurance - With Clean-up - Wide Format	\$0.006	\$0.006	\$0.006	\$0.007	\$0.007	Image
0088	Image Output - Searchable PDF - Wide Format	\$0.005	\$0.005	\$0.005	\$0.006	\$0.006	Image
0089	Indexing - Wide Format	\$0.010	\$0.010	\$0.010	\$0.011	\$0.012	Keystroke

CLIN Document Conversion Labor Categories							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0090	Imaging Data Entry Specialist	\$41.88	\$41.88	\$41.88	\$46.07	\$48.37	Hour
0091	Imaging Operations	\$99.35	\$99.35	\$99.35	\$109.29	\$114.75	Hour
0092	Imaging Production Coordinator	\$56.98	\$56.98	\$56.98	\$62.68	\$65.81	Hour
0093	Imaging Production Specialist I	\$39.51	\$39.51	\$39.51	\$43.46	\$45.63	Hour
0094	Imaging Production Specialist II	\$41.71	\$41.71	\$41.71	\$45.88	\$48.17	Hour
0095	Imaging Production Supervisor	\$64.80	\$64.80	\$64.80	\$71.28	\$74.84	Hour
0096	Implementation Manager - DMS	\$102.81	\$102.81	\$102.81	\$113.09	\$118.74	Hour
0097	Software Engineer	\$124.23	\$124.23	\$124.23	\$136.65	\$143.48	Hour
0098	Principal Software Engineer	\$148.53	\$148.53	\$148.53	\$163.38	\$171.55	Hour
CLIN InSight Content Services Platform Base Package							
	Description	Year 1	Year 2	Year 3	Year 4	Year 5	Per
0099	Annual User Subscription - Base Package (25 Users)	\$9,000.00	\$9,000.00	\$9,000.00	\$9,900.00	\$10,395.00	25 Users
0100	Overage Fees Per User Per Month	\$30.00	\$30.00	\$30.00	\$33.00	\$34.65	Month
0101	Annual Content Under Management Subscription - Base Package (500 GBs Storage)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	GBs
0102	Overage Fees Per 500 GBs Per Month	\$500.00	\$500.00	\$500.00	\$550.00	\$577.50	Month
0103	Professional Services (Estimated T&M)	\$260.00	\$260.00	\$260.00	\$286.00	\$300.30	Hour
0104	One-Time Setup	\$15,600.00	\$15,600.00	\$15,600.00	\$17,160.00	\$18,018.00	Setup

2.3 Transition/Change Over from Incumbent Price

The transition/change over price applies in the event the boxes are currently stored with another vendor and are transitioned to Iron Mountain.

CLIN	Description	Unit Price	Qty	Extended Price
0020	Trip Charge, Standard Pickup, Zone Metro	\$28.68	4.00	\$114.72
0011	Handling Charge	\$3.00	2,194.80	\$6,584.40
0003	Receiving and Entering - Carton	\$1.83	2,194.80	\$4,016.48
0041	RFID Z Label	\$0.672	1,829.00	\$1,229.09
				\$11,944.69

2.4 Pricing Assumptions

Our pricing is based on the following assumptions:

No.	Records Storage / Services Assumptions
1	Iron Mountain assumes 1,829 standard banker boxes at 1.2 CF, totaling to 2,194.80 CF of material.
2	Assuming the materials will be transferred from an incumbent vendor into an Iron Mountain facility, Iron Mountain will rely on the incumbent vendor's compliance to the 90 Day transition period outlined in the solicitation.
No.	Document Conversion Assumptions
2	Pricing for Standard Scanning Tiers 1-4 (CLINs 0054-0057) is the price per image for standard scanning of up to 8.5 x 14 standard paper for varying image volume tiers. Features black & white scanning, a scan resolution of 200 dpi, statistical vs. image quality review, standard TIFF or PDF image output, and image release on a DVD, USB or hard drive. 100% autofeed scanning.
3	Pricing for Flatbed Scanning (CLIN 0059) is the price per image for standard scanning of up to 8.5 x 14 flatbed paper. Features black & white scanning, a scan resolution of 200 dpi, statistical vs. image quality review, standard TIFF or PDF image output, and image release on a DVD, USB or hard drive. 100% manual single page flatbed scanning. Upon request, Iron Mountain can provided pricing for Bound Book scanning if required by the City.
4	Pricing for Wide Format B Scanning (CLIN 0080) is the price per image for wide format scanning of 12 x 18 paper for a volume of 1,999,999 images or less. Features black & white scanning, a scan resolution of 200 dpi, statistical vs. image quality review, standard TIFF or PDF image output, and image release on a DVD, USB or hard drive. Upon request, Iron Mountain can provided pricing for other Wide Format sizes if required by the City (E.g., C - 18x24, D - 24x36, E - 36x48).

5	The default QA level included within the price per image for Standard, Flatbed, and Wide Format B Scanning is statistical quality control utilizing the ANSI/ASQC (American National Standards Institute/American Society for Quality Control) standard Z1.4 at a 1.0 Acceptable Quality Level (AQL) to establish the sample size(s), acceptance, rejection and re-sampling parameters for image, index, and file-level QC.
6	Smaller papers like sticky notes, small photographs, adding-machine tapes, etc. would be taped down to follow-on carrier pages for scanning. This can be done as 1 item per page or multiple items per page at customer's direction.
7	No digital conversion of electronic (non-paper) media is expected to be in scope.
No.	InSight Content Services Platform Assumptions
8	Customers will be charged for capacity overages on a monthly basis, i.e. if a customer goes over their limit in month 10 of year 1, they will only be charged 3 months overages. Overages are charged on in blocks of 500GBs, meaning that the customer will incur overage charges for every additional set of 500GBs (i.e. a customer will be billed overages for one set of 500GBs if they are 25GBs over their limit, and they will be billed overages for two sets of 500GBs if they are 550GBs over their limit).
9	InSight Software subscription is billed annually at the start of each contract. Overage charges are billed monthly in arrears.