



**City of Santa Ana**  
**20 Civic Center Plaza, Santa Ana, CA 92701**  
**Staff Report**  
**December 5, 2023**

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**TOPIC:** Agreement with Iron Mountain Information Management, LLC

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**AGENDA TITLE**

Approve an Agreement with Iron Mountain Information Management, LLC for Document Storage for the Housing Authority, Community Development Agency, and Finance & Management Services Agency (General and Non-General Fund)

**RECOMMENDED ACTION**

Authorize the City Manager to execute an agreement with Iron Mountain Information Management, LLC to provide offsite document storage of Community Development Agency and Finance & Management Services records in an amount not to exceed \$142,700, for a three-year term beginning January 1, 2024 and expiring December 31, 2026 with an option of two one-year extensions, subject to non-substantive changes approved by the City Manager and City Attorney (Contingent upon approval of Housing Authority Item # 3) (Agreement No. 2023-XXX).

**GOVERNMENT CODE §84308 APPLIES:** Yes

**DISCUSSION**

The Housing Authority of the City of Santa Ana (Housing Authority) is required to preserve Housing Choice Voucher Program applicant and participant records for a period of three years from the date of termination or denial of assistance. To comply with this requirement, the Housing Authority currently uses Iron Mountain Information Management, LLC to store and archive files. The Housing Authority is unable to store the records at City Hall because of the volume of records, the lack of storage space, and the infrastructure required to store hundreds of confidential files. The Housing Authority also does not have the administrative capacity to efficiently manage and maintain the records compared to an outside storage facility that will more efficiently manage the records.

As required by the City of Santa Ana Records Retention Schedule, the Finance and Management Services Agency (FMSA) is also required to retain various records and documents for the periods stated within the policy. FMSA is unable to store the numerous records and documents at City Hall due to the lack of sufficient storage space and administrative capacity. Therefore, in order to comply with this requirement, FMSA utilizes an offsite storage facility that has the storage capacity, expertise, and resources to store, archive, retrieve, and destroy such records and documents.

In addition, the Community Development Agency (CDA) is in need of a new offsite storage facility to store documents related to the former Redevelopment Agency, Enterprise and Empowerment Zone, Community Development Block Grant (CDBG) Program, and other miscellaneous documents.

To meet the offsite document storage needs for the Housing Authority, FMSA, and CDA, on July 19, 2023, staff issued a Request for Proposals (RFP # 23-109A) for document storage and imaging services (Exhibit 1) for the Housing Authority, CDA, and FMSA. Responses to the RFP were accepted until August 10, 2023.

The City received bids from Corodata and Iron Mountain Information Management, LLC (“Iron Mountain”). The bids were reviewed by three (3) staff from the Housing Authority and one (1) staff from CDA. The review panel reviewed the two bids and Iron Mountain was selected based upon several factors including innovative technology for requesting files and shredding files and their experience and background in document storage.

Iron Mountain was founded in 1951 and provides services to more than 225,000 customers around the world and hundreds of public sector agencies across the United States. Iron Mountain stores and protects billions of information assets, including business documents. Using modern technology and various checkpoint systems, Iron Mountain provides efficient and effective services to their customers. The three-year term of the agreement would begin on January 1, 2024 (Exhibit 2).

**FISCAL IMPACT**

Funds will be budgeted in the following fiscal years as follows, subject to change. The remaining balance will be budgeted from Housing Authority funds.

<b>Fiscal Year</b>	<b>Accounting Unit-Account</b>	<b>Fund Description</b>	<b>Accounting Unit, Account Description</b>	<b>Amount</b>
FY 2023-24	01110130-62300	General Fund	FMSA – Treasury/ Customer Service Contract Svcs. - Professional	\$1,000
	01110110-63001	General Fund	FMSA – Accounting Misc. Operating Exp.	\$3,500
	01118810-62300	General Fund	CDA-Economic Development Contract Svcs. - Professional	\$10,000
	13518780-62300	CDBG Program	CDA-CDBG Administration Contract Svcs. - Professional	\$5,000
	67018843-62300	Successor Agency	CDA – Successor Agency – Admin.	\$3,100

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			Contract Svcs. - Professional	
<b>Total</b>				<b>\$22,600</b>
FY 2024-25	01110130-62300	General Fund	FMSA – Treasury/ Customer Service Contract Svcs. - Professional	\$1,000
	01110110-63001	General Fund	FMSA – Accounting Misc. Operating Exp.	\$1,200
	01118810-62300	General Fund	CDA-Economic Development Contract Svcs. - Professional	\$10,000
	13518780-62300	CDBG Program	CDA-CDBG Administration Contract Svcs. - Professional	\$5,000
	67018843-62300	Successor Agency	CDA – Successor Agency – Admin. Contract Svcs. - Professional	\$5,000
<b>Total</b>				<b>\$22,200</b>
FY 2025-26	01110130-62300	General Fund	FMSA – Treasury/ Customer Service Contract Svcs. - Professional	\$1,000
	01110110-63001	General Fund	FMSA – Accounting Misc. Operating Exp.	\$1,200
	01118810-62300	General Fund	CDA-Economic Development Contract Svcs. - Professional	\$10,000
	13518780-62300	CDBG Program	CDA-CDBG Administration Contract Svcs. - Professional	\$5,000
	67018843-62300	Successor Agency	CDA – Successor Agency – Admin. Contract Svcs. - Professional	\$1,800
<b>Total</b>				<b>\$19,000</b>

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**EXHIBIT(S)**

1. Request for Proposals (RFP # 23-109A)
2. Agreement with Iron Mountain Information Management, LLC

Submitted By: Michael L. Garcia, Executive Director of Community Development

Approved By: Tom Hatch, Interim City Manager