



# County of Monterey

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

## Board Report

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**File #: 20-434, Version: 1**

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- a. Approve and authorize the Contracts Purchasing Officer to sign an Agreement with The Docu Team LLC for document management, storage, search and retrieval of Public Defender records in the amount of \$50,000 for a three year term, retroactive to December 1, 2019 through November 30, 2022.
- b. Authorize the Contracts Purchasing Officer to execute up to three (3) additional amendments extending the Agreement by one (1) year each, subject to County Counsel review, where additional costs per year do not exceed 10% (\$5,000) of the amended contract amount per amendment and the amendments do not significantly alter the scope of work.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve and authorize the Contracts Purchasing Officer to sign an Agreement with The Docu Team LLC for document management, storage, search and retrieval of Public Defender records in the amount of \$50,000 for a three year term, retroactive to December 1, 2019 through November 30, 2022.
- b. Authorize the Contracts Purchasing Officer to execute up to three (3) additional amendments extending the Agreement by one (1) year each, subject to County Counsel review, where additional costs per year do not exceed 10% (\$5,000) of the amended contract amount per amendment and the amendments do not significantly alter the scope of work.

### SUMMARY:

The Public Defender office contracted with Offsite Records in 2007 to manage, store, retrieve and search closed client records. Records Retention Center, operated by the county, also serves our department with document storage however it only manages purged files prior to 2007. Due to our rapid demands and time constraints, the office could not continue using the county's records service. Our archives are requested on a daily to weekly basis and must be retrieved within hours of the request in order to prepare our attorneys adequately for court.

In February 2020, the Public Defender's Office was notified of the change in ownership between Offsite Records and The Docu Team LLC through a request to execute an "Assumption Agreement" by Docu Team. After seeking guidance from County Counsel and the Contracts Purchasing Department, it was determined that the Assumption Agreement could not be executed because there was no existing contract with Offsite Records that Docu Team could assume, Offsite Records previously having been paid by a blanket purchase order, BPO 2270-8169-0000011943.

Docu Team houses approximately 2,426 banker boxes of Public Defender files. This number has slowly decreased as we continue to transition into a paperless system. Although, the Department is not entirely digital, it has improved significantly in this area and continues with its efforts.

The Public Defender's office requests approval of a three-year agreement retroactive to December 1, 2019 through November 30, 2022 to continue the use of this service. As stated above, Docu Team acquired ownership in December 2019 and the Public Defender's Office was notified two months after in February 2020, our accounting staff received insurance documentation in mid-March, and we began the agreement process in

April.

OTHER AGENCY INVOLVEMENT:

County Counsel has reviewed Agreement as to form.

FINANCING:

The costs associated with this agreement are included in the Public Defender's FY 2019-2020 Adopted Budget, Fund 001, department 2270, Budget Unit 8169, Appropriation Unit PUB001. Future year's costs will be included in the respective annual budgets.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

This contract meets the Board's strategic initiatives by promoting an organization that practices efficient and effective resource management and is recognized for responsiveness, strong customer orientation, accountability and transparency.

Mark a check to the related Board of Supervisors Strategic Initiatives

☐ Economic Development  
☒ Administration  
☐ Health & Human Services  
☐ Infrastructure  
☐ Public Safety

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Approved by: Susan E. Chapman, Public Defender, x.5806

Attachments:

Board Report

Agreement with The Docu Team LLC