



# Housing Authority of the City of Pittsburgh

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February 14, 2014

## Document/Record Storage Management and Related Services RFP#250-01-14

### ADDENDUM NO.3

This addendum issued February 14, 2014 becomes in its entirety a part of the Request for Proposals RFP#250-01-14 as is fully set forth herein:

**Item 1:** Q: How many cubic feet of stored material does the Housing Authority need currently and what is projected for the next three years?

**A:** 6205.2 cubic feet (3297 boxes) is currently being used.

The future projected use (other than the current amount) is unknown.

**Item 2:** Q: Who has the contract currently and is there a "perm out" fee?

**A:** Business Records Management is the current vendor. There is no "perm-out" fee.

**Item 3:** Q: If there is a "perm out" fee, what is the "perm out" fee per box?

**A:** See Item 2

**Item 4:** Q: Who is responsible for paying the "perm out" fee if one exist?

**A:** See Item 2

**Item 5:** Q: How many boxes(or cubic feet) are to be destroyed in the next 2 years?

**A:** 15596 lbs (approximately)

**Item 6:** Q: How many locations require shredding bins?

**A:** 1 building location but HACP utilizes 6 bins in various gallon sizes

**Item 7:** Q: What is the rotation schedule for shredding?

**A:** "At will"

- Item 8:** Q: How many years does the Housing Authority currently keep files?  
A: **Indefinitely**
- Item 9:** Q: What is the disposal policy/destruction schedule and terms for Housing Authority records?  
A: **See Attachment A to this Addendum.**
- Item 10:** Q: What is the required turnaround time for a record that has been requested?  
A: **3 days**
- Item 11:** Q: Will you be requesting a file or a box of files?  
A: **Both**
- Item 12:** Q: If you request a box, will you need the files to be indexed upon returning?  
A: **No**
- Item 13:** Q: Would the Housing Authority be interested in creating digital images of those documents they access more frequently if it was more cost effective and more efficient?  
A: **Yes**
- Item 14:** Q: Based on the past year, how many files have been requested per day? Per week? Per year?  
A: **48 files and 21 boxes for the year**
- Item 15:** Q: What is the average number of pages in a resident's file?  
A: **75**
- Item 16:** Q: What is the average amount of years a resident lives in Housing Authority Property?  
A: **8.5 years**
- Item 17:** Q: How many new residents do you expect in the next three years?  
A: **1,500**
- Item 18:** Q: What are the criteria for termination for "just cause"?  
A: **See Attachment C General Conditions for Non-Construction Contracts section 3 of the IFB and Section 7 Termination of the contract.**
- Item 19:** Q: How much current or future content is to be stored. How would like us to breakout the cost proposal?  
A: **Cost breakdown for each type of service (storage, shredding, retrieval etc)**

**Item 20: Q:** Section 3: Can Customer elaborate on the pre-screening of employees and training that they undergo?

**A:** Yes, please contact Kira Johnson at 412-456-5000 x1024 or [Kira.Johnson@hacp.org](mailto:Kira.Johnson@hacp.org).

**Item 21: Q:** Section 3: Can Customer provide a list of resident-owned businesses or a list of other economic interests?

**A:** No, you will be referred to Regional Housing Legal Services

**Item 22: Q:** Is there any requirement for Vendor to be a qualified records management service provider?

**A:** Yes

**Item 23: Q:** Does Customer require the Vendor to own its own shredding division or is a third party subcontractor permitted? Is AAA NAID Certification required?

**A:** 3<sup>rd</sup> party subcontractor permitted. AAA NAID not required, but preferred

**Item 24: Q:** What is required shred width for Customer's documents?

**A:** Equivalent to cross cutting

**Item 25: Q:** Does Vendor need to meet both the 18% MBE and 7% WBE for this contract, or can Vendor meet one or the other?

**A:** Yes the vendor needs to meet both 18% MBE or 7% WBE goals or show best efforts to reach these goals were done for both.

**Item 26: Q:** Do you require that media is stored in an area specifically designed for media storage (i.e. temperature, humidity, fire suppression, monitored security, video monitors, etc.)?

**A:** Climate controlled environment

**Item 27: Q:** Is the resident labor percentage of contract requirement based on total contract value as noted on the RFP No. 250-01-14 or is it annualized by growth?

**A:** Yes it based off the total contract amount for service contracts.

This information is located on page 6 of the bid packet.

**Item 28: Q:** Does Customer require that all employees be e-verified as required by federal guidelines?

**A:** No

**Item 29: Q:** During the pre-bid meeting, the term "relatively quick" was used to describe the delivery process. Does Customer have a required turn-around time after placing the request?

**A:** See Item 10

**Item 30: Q:** Does Customer require that end-users be able to interact with Vendor through a web portal for service requests, inventory requests, etc.?

**A:** No. Phone and email access will suffice.

**Item 31: Q:** Digital imaging of documents was not mentioned within the RFP No. 250-01-14. Are Vendors encourage to include information regarding imaging in their response? If yes, what are the volumes and document types of items to be imaged?

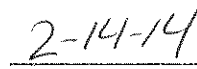
**A:** No

**Item 32:** The proposal due date is revised to Feb. 25, 2014. The time, and location remain unchanged at 2:00 PM at the HACP Procurement Dept., 100 Ross St. 2<sup>nd</sup> Floor, Suite 200, Pittsburgh, PA 15219.

**END OF ADDENDUM NO. 3**



Mr. Kim Detrick  
Procurement Director/Contracting Officer



Date

Attachment A  
HACP disposal policy/destruction schedule  
(RFP-250-01-14 Document/Record Storage Management and Related Services)

## DOCUMENT RETENTION

### Permanent

Active Executed Lease  
Audit Reports of CPAs  
By-Laws  
Cancelled Checks for Key Payments  
Capital Stock and Bond Records  
Contracts - Active  
Corporate Minute Books  
Deeds, Mortgages and Bills of Sale for Real Estate  
Election Procedures  
Election Results  
Employee Personnel Records<sup>1</sup>-Active  
Executive Director Tenant Council Minutes  
Family Applications of Active Residents  
Hazardous Maintenance  
Insurance Policies (in force)  
Ledgers, General and Private  
Property Records  
Tax Records  
Trademark Registration

### Indefinite

Financial Records - ongoing

### Ten Years

Bankruptcy Files

### Nine Years

Bank Statements and Reconciliations

### Seven Years

Canceled Checks for Standard Transactions  
Settled Claims  
Tax Return Backup Documents  
Time Books

## **Six Years**

Travel Expenses

## **Four Years**

Applicant/Participant Records<sup>ii</sup>  
Budget, Program Description Timelines  
Contracts<sup>iii</sup>  
Correspondence, including memos  
Equipment List  
Family Applications  
Grant Applications  
Grant, General Information  
Grants  
Insurance Policies (expired)  
Lease, Executed and Inactive  
Memorandums of Understanding  
Operating Funds  
Proposals  
Section 8 Applications of Ineligible Families  
Service Provider Invoices/Documentation  
Service Provider Monthly Assessment Report  
Tenant Charge Files

## **At Least Three Years**

Accounts/Other Records Supporting  
Budget and Financial Statements  
Inspection Reports  
Lead Based Paint Inspection  
Notices of Ineligibility for Section 8 Applicants  
Police - Annual Accreditation  
Police - Annual Arrest by Community  
Police - Monthly Crime Summary Report  
Preventative Maintenance Records  
Reports, HUD Required

## **Three Years**

Arrest  
Employment Applications  
Employee Records - Terminated

## Two Years

Accident Reports  
Annual Special Assignment Report  
Annual Traffic Analysis  
Central Location - Code Enforcement  
Non-Traffic Citations  
Officers Daily Activity Reports  
Police - Accident Injury Reports  
Police - Crime Analysis Reports  
Police - Station Copies of all Initial Crime Reports  
Police - Ten Day Daily Recaps  
Police - Use of Force Reports  
Traffic Citations

## One Year

Lost, Stolen, and Damaged Property Reports

## Three Months

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<sup>i</sup> Includes disciplinary, promotional, medical, attendance and payroll records.

<sup>ii</sup> Includes income, racial, ethnic, gender, and disability status data for applicants and terminated participants.

<sup>iii</sup> Includes individual personnel, procurement and purchase agreements.



Attachment B  
Revised Fee Sheet (Attachment K)  
(RFP-250-01-14 Document/Record Storage Management and Related Services)

**ATTACHMENT K Revised II**

**Document/Record Storage Management and Related Services**

**RFP#250-01-14**

**FEE SHEET**

**To be submitted in a separate sealed envelope**

**PRICE IS TO BE LISTED PER THE FOLLOWING:**

<b>Carton Activity: option</b>	<b>Initial Term</b>	<b>1<sup>st</sup> extension option</b>	<b>2<sup>nd</sup> extension</b>
Document Pick up from HACP			
Shelving & Coding			
Retrieval			
Retrieval (Rush)			
Refile			
Permanent Removal(Prep work, data entry & verification)			
Record Center Dock Access			

<b>File Activity option</b>	<b>Initial Term</b>	<b>1<sup>st</sup> extension option</b>	<b>2<sup>nd</sup> extension</b>
<i>Folders</i>			
Scanning Charge			
Indexing from Transmittal sheets			
Indexing Other			
Retrieval (pulling from standard carton)			
Retrieval (Rush Pulling)			
Refile (refilling in standard carton)			
Permanent Removal(Prep work, data entry & verification)			
Record Center Dock Access			
<i>Computerized Tracking</i>			
Monthly Charge (per file)			

<b>Delivery/Pickup Fees option</b>	<b>Initial Term</b>	<b>1<sup>st</sup> extension option</b>	<b>2<sup>nd</sup> extension</b>
<i>Regular Business hours (M-F, 8am - 5 pm)</i>			
1 - 25 cartons and/or files			
26 or more cartons and/or files			
<i>Holiday hours</i>			
1 - 25 cartons and/or files			
26 or more cartons and/or files			

<b>Destruction: option</b>	<b>Initial Term</b>	<b>1<sup>st</sup> extension option</b>	<b>2<sup>nd</sup> extension</b>
Hard Copy			
Computer Media			
Mobile Tote			
Mobile tote HACP site shredding			

<b>Hard Copy Storage: option</b>	<b>Initial Term</b>	<b>1<sup>st</sup> extension option</b>	<b>2<sup>nd</sup> extension</b>
<i>Monthly Fees</i>			
Minimum Charge (storage)			
Administration Fee			
Standard Box storage			
Climate controlled box storage			
Vault storage			
Pallet storage (warehouse)			

<b>Cartons: option</b>	<b>Initial Term</b>	<b>1<sup>st</sup> extension option</b>	<b>2<sup>nd</sup> extension</b>
Standard (letter/legal) size			
Other			

"Perm Out Fee" \$ \_\_\_\_\_

Pick up of Boxes (3300)\$ \_\_\_\_\_

**Total Project Cost:  
Initial Term**

Option	Cost (from above)	Number of Boxes	Initial Term (in months)	Total
Administration Fee		3300	36	
Standard Box Storage		3300	36	
Total Project Cost (Add total column together)				

**Ext. Opt 1**

Option	Cost (from above)	Number of Boxes	Initial Term (in months)	Total
Administration Fee		3300	12	
Standard Box Storage		3300	12	
Total Project Cost (Add total column together)				

**Ext Opt 2**

Option	Cost (from above)	Number of Boxes	Initial Term (in months)	Total
Administration Fee		3300	12	
Standard Box Storage		3300	12	
Total Project Cost (Add total column together)				

**Total Project Cost: \$** \_\_\_\_\_  
(add the totals for Initial Term, Ext Opt 1 and Ext Opt 2 together)

**Total Project Cost: \$** \_\_\_\_\_  
(in words)

Name (Printed): \_\_\_\_\_

Company Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Signature: \_\_\_\_\_