

**State of Michigan
Records Management Services**

Guide to Selecting Records Storage Vendors

Government agencies often have limited storage space available in their offices for the records that they need to retain. As a result, they may consider hiring a vendor to store records until their retention periods are met. Government agencies need to be careful when selecting a records storage vendor. The following checklist will help you determine if a records storage vendor can meet your agency's needs.

		Excellent	Good	Average	Poor	Not Applicable
Company Information						
1	Financial stability of the company					
2	Company references					
3	Company history/longevity in the business of storing records					
Security						
4	24-hour monitored security					
5	Authorized access to the facility					
6	In-house security training and procedures					
7	Monitored vault entry					
8	Secure loading and unloading area					
9	Authorization procedures meet the requirements of the records					
10	Daily security check					
11	Regular inspection and testing of security procedures					
12	In-house network/data security					
13	Data backup procedures					
14	Secure electronic transmission/delivery					
Disaster Prevention/Planning						
15	Smoke detection systems					
16	Fire detection systems					
17	Fire suppression systems					
18	No smoking policy					
19	Regularly maintained and tested internal disaster plan					
20	Regular inspection and testing of fire prevention and alarm systems					
21	Alarm system activated by line tampering or disruption					
Facility						
22	Desirable location					
23	Meets earthquake code and other construction standards					
24	Back-up power systems					
25	Proper insurance coverage in the event of a disaster (How are clients compensated for lost/damaged records?)					
26	Stand-alone building					
27	Multi-tenant building					
28	Are other businesses near the facility that could be potentially hazardous?					
29	Is the area prone to floods or other natural disasters?					
30	Will records be stored below grade level?					
Courier Vehicles						
31	Vehicles are designed for safe media transport					
32	Vehicles are climate controlled					

33	Vehicles have appropriate security					
34	Vehicles are secured while at a delivery/pick-up site					
35	Vehicles are properly maintained					
36	Vehicles are equipped with communications devices					
37	Vehicles are equipped with a fire extinguisher					
Policies and Procedures						
38	Clear and acceptable business contract					
39	Shipping and receiving records signed and maintained for future reference					
40	Comprehensive employee screening process					
41	Employee substance abuse policy					
42	Employees/drivers are provided uniforms and identification cards					
43	Employees are required to sign a confidentiality agreement					
44	Continuing employee education					
45	After-hours personnel trained to handle client emergencies/requests					
Storage Space						
46	Appropriate environmental controls and shelving for audio and video tapes					
47	Appropriate environmental controls and shelving for computer media					
48	Appropriate environmental controls and shelving for paper records					
49	Appropriate environmental controls and shelving for micrographics					
50	Appropriate environmental controls and shelving for x-rays					
51	Appropriate shelving for over-sized materials					
52	Sufficient space for current and future needs					
53	Racking and shelving designed for storing records					
54	Auxiliary power backup					
55	Pest controls					
Customer Services						
56	24/7 customer access					
57	Barcode tracking					
58	Client procedures and training					
59	On-site client reference/access space					
60	Computer reporting					
61	Confidential records destruction					
62	Billing procedures (Can bills be broken down for multiple accounting codes? Are all fees on the bill clearly identified?)					
63	Fax transmission fees					
64	Index and inventory service fees					
65	Phone reference fees					
66	Retrieval and re-file service fees					
67	Interfiling fees					
68	Storage container fees					
69	Detailed list of potential service fees					
Overall Rating						
For additional information, please refer to "Guideline for the Evaluation of Records and Information Storage Providers: An RFP and RFQ Checklist for Selecting Offsite Physical Storage and Services Vendors." This guide is available from ARMA International at http://www.arma.org/bookstore/productdetail.cfm?ProductID=2220 .						