

CONTRACT OPPORTUNITY ANNOUNCEMENT

Contract Type:

- Professional Service Contract
 Construction Contract
 Service Contract
 Material Requirement
 Other

Opportunity Summary:

Contract Opportunity Title: RFP 242016 Document Retention, Storage, and Digitization

Request For: Proposal

Estimated Contract Value: N/A

Work Location: California

Response Due Date: Register interest no later than July 6, 2026, 3:00 PM PT
RFP tentative release date: July 10, 2026.
Formal RFP responses are due August 7, 2026, at 3:00 PM PT

NAICS Code / Size Standard 541618/\$19M

Opportunity Description:

Background:

Pacific Gas and Electric Company, incorporated in California in 1905, is one of the largest utility companies in the United States. Based in Oakland, the company is part of [PG&E Corporation](#).

There are approximately 23,000 employees who conduct Pacific Gas and Electric Company's primary business, the transmission and delivery of energy. The company provides [natural gas](#) and [electric service](#) to approximately 16 million people throughout a 70,000-square-mile service area in northern and central California. PG&E service area stretches from Eureka in the north to Bakersfield in the south, and from the Pacific Ocean in the west to the Sierra Nevada in the east.

Pacific Gas and Electric Company and other energy companies in the state are regulated by the [California Public Utilities Commission](#). The CPUC was created by the state legislature in 1911.

PG&E is focused on rebuilding trust with the customers and hometowns we are privileged to serve and everyone we work with as we deliver on our triple bottom line approach of serving People, the Planet, and California's Prosperity. As we build California's energy future, we will continue our efforts to ensure that businesses have an equitable opportunity to compete for PG&E's business.

Contract Opportunity Description:

Opportunity Description

Pacific Gas and Electric Company (PG&E) invites proposals from experienced suppliers for the provision of enterprise-scale physical records offsite storage, retrieval, digitization, and metadata integration services in support of PG&E's Information and Records Governance (IRG) program.

This contract will enable security, compliance, and efficient management of physical records while advancing PG&E's transition toward enhanced digital access and metadata-driven retrieval capabilities.

The selected supplier must demonstrate the ability to support **large-scale storage operations exceeding 350,000+ record boxes and data storage devices**, including standard record cartons & phones/tablets as well as specialized storage environments such as **temperature-controlled and fire-suppressed (e.g., halon or equivalent) facilities**, consistent with regulatory and operational requirements.

Scope of Services: The supplier will be responsible for delivering an integrated service model that includes:

1. **STORAGE SERVICES.** Vendor shall securely store the PG&E Records delivered to Vendor, and take actions including, without limitation, the following:
 - Vendor shall use standard size cubic foot boxes and provide all necessary equipment to facilitate transfers and deliveries, such as carts, dolly, pallet movers, etc.
 - Vendor shall employ one computerized inventory/tracking system, protected, accurate, traceable, and verifiable, all in accordance with industry standards and best practices.
 - The system should be capable of tracking individual boxes, status (checked in/checked out), identification of office of origin, notes office or individual authorizing release or access and with barcode/tracking ability and RFID capabilities which include tracking of all boxes, including during transit to ensure strong chain of custody controls.
 - The system should also be able to produce timely and periodic reports, so that PG&E can monitor transfers, charge outs/retrievals, and disposition.
 - Vendor will provide customized reports regarding the Records stored at its facilities, if not available online, on an as-needed basis to PG&E at no additional cost.
 2. **STORAGE FACILITIES.** Each Vendor facility storing PG&E Records shall:
 - Meet recognized standards for records storage facility design and construction. At a minimum, facilities must meet ARMA Records Center Operations Standard TR 01-2011, National Fire Protection Association (NFPA) Standard 232.
 - Store all boxes on shelving. No boxes shall be stored directly on the floor or on pallets on the floor. Segregate records storage from other warehouse operations if the Vendor facility engages in both types of activities.
 - Provide robust access controls, monitoring, and chain-of-custody compliance.
 - Provide an on-site client access room for onsite research and use of Records. At a minimum, each access room should be clean, furnished with sufficient tables and chairs to accommodate a reasonable number of users, and provide working Wi-Fi, adequate ventilation, heating, and cooling so that the room may be used comfortably.
 - Provide adequate pest control in conformance with best industry practices.
 - Meet best industry standards for smoke detection, sprinkler systems etc. and be able to provide a copy of its most recent fire inspection report.
 - Meet NFPA 232A for specialized vault storage.
 - Be routinely cleaned.
 - Be subject to a disaster recovery plan. Vendor's current disaster recovery plan to be provided in the bid response.
-

3. **DEPOSITS.** PG&E may deposit new Records or Devices with the Vendor by providing notification that the Records are ready for pickup at a specified PG&E site. Upon receiving such notification, the Vendor is responsible for picking up the Records from the designated site and transporting them to its facilities in accordance with Section 4. Alternatively, PG&E may choose to ship the Records directly to the Vendor facility.

3.1 Upon receiving Records deposits, Vendor shall:

- Scan the Record (which will already have a Vendor RFID label, either because it is in a vendor box or has a Vendor label that Vendor has supplied to PG&E) into Vendor's tracking system.
- Transport each box to an assigned shelf location at the Vendor facility and perform a scan to the shelf.
- Upload the shelf scan to Vendor's computer system.
- Send receipts for each box or device, including the Vendor RFID number, to PG&E's designated Operations email address.
- Reconcile any discrepancies noted by PG&E after PG&E receives the receipts.
- **Vendor to provide cost per cubic foot of Records for receiving and entering such services.**
- **Vendor to provide cost per for devices i.e., phones/tablets for the following:**

Storage:	
1) Slotted Media	6) Medium Container
2) Slotted Media – Round Reel	7) Large Container
3) Slotted Media – Oversized	8) XLarge Container
4) Compact Container	9) Storage Cabinet
5) Small Container	10) Cart
Services:	
1) Handling - Slotted Media (1-56)	6) Media Handling Minimum
2) Handling - Slotted Media (57-9,999)	7) Trip Charge - Standard Special
3) Handling - Container	8) Trip Charge - Critical Special
4) Handling - Transport	9) Minimum Monthly Fee
5) Containers, Transport	10) Holiday Charge
Supplies:	
1) Security Clips	
2) Lock Sale	
3) Custom Barcode	
Other Program Fees:	
1) Administrative Fees:	
2) Transport Cart	
Transportation:	
1) Transport	
2) Trip Charge Standard	
3) Sub Account (Same Stop) Fee	

4. **PICKUPS.** Vendor may pick up Records from PG&E sites at PG&E's request for depositing at the Vendor facilities as follows:

4.1 Local Regular Pickups

• Local regular pickup orders placed before 3:00 PM on a Business Day will be picked up within the following two Business Days no later than 3:00 PM on the day of pickup. This delivery schedule is premised on the order not exceeding five hundred (500) Records per day per physical PG&E facility, and the PG&E pickup site not exceeding fifty (50) road miles from a vendor facility.

- For such a Physical Records pickup, Vendor to provide PG&E cost for such services along with the cost per cubic foot for Records.

4.2 Non-Local Pickup.

• Pickup orders for a PG&E pickup site exceeding fifty (50) road miles from Vendor facility placed before 4:00 PM on a Business Day shall be picked up within the following five Business Days no later than 3:00pm PM on the day of pickup.

- For such a pickup, Vendor can contract with a third-party carrier and shall pass through that cost to PG&E.

4.3 Excess Record Pickups.

• An order for regular local pickup exceeding five hundred (500) Records per day per physical PG&E facility, or an order for local rush pickup exceeding one hundred (100) cubic feet per day per physical PG&E facility, shall be picked up at a time to be negotiated between the Parties based on the number of Records, at the prices set forth above.

4.4 **Device Pickup** i.e., phones, for a scheduled service must be placed on or before 7:00 PM the previous business day. Any "add-on" requests submitted prior to 7:00 PM on the previous business day will be fulfilled during the next scheduled service.

5. STORAGE.

Vendor to provide PG&E the fee it will charge to store Records.

- For temperature-controlled storage, Vendor to provide fee by per cubic foot per month.
- For temperature and humidity-controlled storage, the Vendor to provide fee by per cubic foot per month.
- For Device Storage e.g. smartphones, tablets, laptops retained for evidence.

6. **RETRIEVAL.** PG&E may request that Vendor retrieve Records or Devices stored so that they may be accessed by PG&E at Vendor's facilities or transported from Vendor's facilities by Vendor to PG&E, or PG&E's Vendors, as follows:

6.1 Regular Retrieval – Record. Vendor shall retrieve Records within 24 hours of PG&E's request.

- Vendor to provide the cost for regular retrieval of Records by per cubic foot.

6.2 Rush Retrieval – Record. On a rush basis, Vendor shall retrieve Records within four hours of PG&E's request.

- Vendor to provide the cost for rush retrieval of Records by per cubic foot.

6.3 Regular Retrieval – File from Record. Vendor shall retrieve specified files from a Record within 24 hours of PG&E's request.

- Vendor to provide the cost for regular retrieval of files from a Record by per file

6.4 Rush Retrieval – File from Record. On a rush basis, Vendor shall retrieve files from a Record within 4 hours of PG&E's request.

- Vendor to provide cost for rush retrieval of files from a Record by per file.

6.5 Daily Volume Cap. The daily volume cap for standard retrieval services is 240 Records. Requests greater than 240 Records must be routed through escalation contacts for expedited premium service scheduling where volume discounts can be negotiated. PG&E will provide a minimum 48-hour advance notice for retrieval of Records beyond the cap of 240 Records per day. Vendor to provide details around Volume Cap, if applicable to this RFP Scope.

6.6 Where PG&E is retrieving Records pursuant to a delivery request per Section 7 hereof, the deadlines in Section 7 shall apply, and the retrieval deadlines in Section 6 shall not apply.

7. DELIVERY. PG&E may request that Vendor deliver to PG&E sites for Records or Devices stored at the Vendor site, as follows:

7.1 Next Day Delivery. • Next day delivery orders placed by 3:00 PM will be delivered the next Business Day before 3:00 PM. This delivery schedule is premised on the order not exceeding fifty (50) Records, and the PG&E delivery site not exceeding fifty (50) road miles from the Vendor facility.

- For such a delivery, Vendor shall provide PG&E with delivery cost plus cost per cubic foot of Records.

7.2 Half Day Delivery. • Half day delivery orders placed by 10:00 AM will be delivered on the same Business Day before 3:00 PM; half day delivery orders placed after 10:00 AM and before 3:00 PM will be delivered on the next Business Day by 12:00 PM. This delivery schedule is premised on the order not exceeding fifty (50) Records, and the PG&E delivery site not exceeding fifty (50) road miles from the Vendor facility.

- For such a delivery, Vendor shall provide PG&E the delivery cost plus cost per cubic foot of Records.

7.3 Rush Delivery, Business Day. • Rush delivery, business day orders will be delivered within three hours of placement of the order (for orders received not later than 2:00 PM) on a Business Day. If such an order is placed after 2:00 p.m. local time on a Business Day, the Order will be delivered as a "Rush Delivery - Weekends/Holidays/After Hours" (four-hour delivery on the same day) or delivered the next Business Day by 11:00 a.m. as a Half-Day Delivery – Business Day Order type. This delivery schedule is based on the order not exceeding fifty (50) Records and the PG&E delivery site not being more than fifty (50) road miles from a vendor facility.

- For such a delivery, Vendor should provide PG&E cost per delivery plus cost per cubic foot of Records.

7.4 Rush Delivery, Weekends/Holidays/After Hours. • Rush delivery, weekends/holidays/After Hours orders will be delivered no later than four (4) hours after placement of the order. This service applies when requesting delivery at a PG&E site on an accelerated basis when placement of order is received after 2:00 p.m.

local time on a Business Day, or on weekends or holidays. This delivery schedule is conditioned on the order not exceeding fifty (50) Records and the delivery destination not exceeding fifty (50) road miles from the Vendor facility. Requests outside of this condition shall be delivered as negotiated between the Parties based on the number of Records and/or the distance to the delivery site. The price for such deliveries shall also be negotiated.

- For such a delivery, Vendor shall provide PG&E cost per delivery plus cost per cubic foot of Records.

7.5 Non-Local Delivery. • Delivery to PG&E delivery sites more than fifty (50) road miles from a vendor facility can be completed via 3rd Party Carrier and shipped per the following service levels:

- For such deliveries, Vendor shall provide PG&E the amount (original invoice) that Vendor is charged by the 3rd Party plus packaging and handling charges per Record.

Service Level of PG&E Delivery Order	Released to Carrier when:	PG&E/Vendor Preferred Shipping Service Level Chosen:
Same Day Service Requested BY 3:00PM Local Time	Same Day	Next Day AM
Same Day Service Requested AFTER 3:00PM Local Time	Next Day	Next Day AM
Half Day Requested AFTER 10:00 AM, Next Day, Scheduled	Next Day	Ground

8. REFILING. PG&E may request that Vendor refile Records or files previously retrieved by returning them to the shelf or Record in the Vendor facility, as applicable, as follows:

8.1 Regular Refile – Record. Vendor shall refile Records within 72 hours of PG&E’s request.

- Vendor to provide PG&E the cost for regular refile of Records by per cubic foot and per device or device container.

8.2 Regular Refile – File from Record. Vendor shall refile specified files from a Record within 72 hours of PG&E’s request.

- Vendor to provide PG&E the cost for regular refile of files from a Record by per file.
- Vendor to provide PG&E the cost for refile of individual devices and/or device containers listed in section 3.1.

9. DESTRUCTION. PG&E may request that Vendor destroy Records stored at Vendor, as follows:

9.1 Archival Destruction - Record. Vendor shall securely shred Records, and their paper-based content.

- Vendor to provide fee by per cubic foot, plus any relevant retrieval fee by per cubic foot.

9.2 Archival Destruction –File from Record. Vendor shall securely shred individual files contained in Records (rather than entire Records), and their paper-based contents.

- Vendor to provide fee by per cubic foot, plus a retrieval fee by per File.

9.3 Destruction Certifications. Vendor shall provide certifications to PG&E of boxes destroyed by PG&E request.

10. PERMANENT WITHDRAWAL. PG&E may permanently remove Records from Vendor’s facilities as follows:

10.1 Permanent Withdrawal - Record. At PG&E’s request, Vendor shall permanently remove Records stored at Vendor.

- Vendor to provide a fee per cubic foot, plus any relevant retrieval fee of by per cubic foot.

10.2 Permanent Withdrawal – File from Record. At PG&E’s request, Vendor shall permanently remove individual files contained in Records (rather than entire Records), and their paper-based contents, stored at Vendor.

- Vendor to provide a fee by per File, plus any relevant retrieval fee by per File.

11. SUPPLIES. Vendor should provide unit storage costs for supplies at PG&E's request for the following:

- 11.1 #200 X-Ray Carton (15 x 6.25 x 20 / 1.8 cubic feet) =
- 11.2 #2000A Auto-Fold Letter/Legal Carton (15 x 12 x 10 / 1.2 cubic feet) =
- 11.3 #2000 Standard Letter/Legal Carton (15 x 12 x 10 / 1.2 cubic feet) =
- 11.4 #450 Letter Transfile Carton (24 x 12 x 10 / 2.4 cubic feet) =
- 11.5 #550 Legal Transfile Carton (24 x 15 x 10 / 3.6 cubic feet) =
- 11.6 #844 Check Carton (24 x 9 x 4.5 / 0.9 cubic feet) =
- 11.7 #631 Medium Planner Carton (43 x 6 x 6 / 1.5 cubic feet) =
- 11.8 Device Media supplies see section 3.1.

12. IMAGE ON DEMAND. Vendor shall provide its Image on Demand services to PG&E as follows:

12.1 Vendor shall provide Image on Demand services for a minimum of fifty images, provide cost plus cost for each image more than fifty.

12.2 Conversion work (covering document preparation, scanning, quality control, standard indexing, scanning non-letter legal documents and reassembly) that exceeds 8 minutes, provide per file charges by hourly rate (per order).

12.3 Flatbed scanning may be required for damaged, illegible, and/or odd sized documents, vendor to provide the photocopy rate.

12.4 Provide Image on Demand Services, if available, for a next-day service. Provide cost for rush or half day Image on Demand services as well.

12.5 All pages contained in a file submitted for Image on Demand service should be scanned. Digital images to be scanned at 300 DPI, in black and white as a PDF multi-page image or in color as requested by PG&E.

12.6 Vendor shall work with PG&E to implement customized naming convention for (Image on Demand digital scans) file names to enable PG&E to implement a more efficient process for retrievals and integration within PG&E inventory tool.

13. Metadata Integration & System Interoperability: A critical requirement of this engagement is the supplier's ability to **integrate with PG&E's physical records inventory ecosystem.**

13.1 The supplier must: Enable secure exchange of records inventory data and metadata between Offsite vendor inventory database, tracking system and PG&E Inventory tool (Zasio Versatile products) for the following order types:

- Supplies e.g., boxes and labels.
- Deposits (New Inventory)
- Pick-up/Deliveries
- Retrieval of Boxes
- Retrieval of files for scans
- Image on Demand
- Permanent Withdrawal
- Update existing inventory.
- Destruction Orders

13.2 Utilize PG&E-provided metadata fields (beyond box and file sequence numbers) to:

- a. Support bidirectional visibility where appropriate.
- b. Improve searchability and retrieval accuracy.
- c. Increase successful document "found" rates.
- d. enable streamlined record retrieval processes resulting in reduced complexity.

13.4 Suppliers should use modern technology to enhance operations, including:

- a. Mobile-enabled workflows (e.g., tablets or equivalent devices for warehouse staff).
- b. Real-time access to record metadata during retrieval and scanning activities. PG&E will provide core identifiers (e.g., box number and file sequence), while the supplier's tools must enable enriched metadata access to their staff to support accurate and efficient retrievals.
- c. Vendor to provide a fee and the ability to integrate with PG&E Inventory tools, plus any relevant fees for customization including but not limited to:
 - Configuration, setup, and validation
 - File transfers Nightly Maintenance
 - File transfers Annual Maintenance
 - Set up Nightly History Downloads
 -

14. ANNUAL AUDITS. PG&E will conduct annual audits of vendor facilities where most PG&E records are stored. These audits are intended to ensure compliance with the terms outlined in the Agreement, as well as adherence to ARMA industry standards for records storage facilities. Facilities that are used less frequently will be audited at least once during the contract period. PG&E will maintain documentation and logs of all visits, including detailed findings from each audit. When deviations from the required standards are identified, PG&E expects the vendor to implement corrective actions to address those issues.

15. ACCOUNT MANAGEMENT & BILLING.

- a. Vendor must assign dedicated support to PG&E. The resources' roles and responsibilities include the following and are not limited to:
- b. Deliver timely and accurate monthly invoices aligned to rates displayed on the contract/MSA.
- c. Provide monthly billing detail reports categorized by storage type that match invoice totals. Each report should include, at a minimum and when applicable: Customer ID (Storage Account), Division, Division Name, Department Name, Invoice ID, Invoice Date, Order Number, Order Date, Bill Code, Bill Code Description, Unit Quantity, Unit Rate, Amount, Order Purchase Order #, Contract Purchase Order #, Ordered by, Taxes/Surcharge, Order Contact, Storage Dates.
- d. Deliver timely and accurate monthly forecast PG&E.
- e. Respond to typical agenda items may include but are not limited to a review of:
 - 1. SLA performance
 - 2. Billing inquiries and resolution
 - 3. Timely updates to billing codes for new contract terms
 - 4. Single point of contact for Customer Support escalations
 - 5. Participate in problem solving sessions to address challenges and opportunities
 - 6. Oversight to ensure timely submission of accruals and invoices to PG&E
 - 7. Proactively resolve reoccurring issue with root cause solutions
 - 8. Provide training for online tool usage
 - 9. Ensure vendor staff are trained on new unique processes established for PG&E
 - 10. Oversight of deliverables related to other Statement of Work projects such as digitization efforts and box audits
 - 11. Develop and manage on-going issue tracker to ensure timely resolution.
 - 12. Conduct analysis on PG&E's current state of records management, providing benchmarking and best practices customized to PG&E to support its advancement of record maturity.

15.1 BUSINESS REVIEW. Vendor should provide PG&E monthly reporting in a mutually agreeable format on the following:

- 15.2 Storage volumes
- 15.3 Retrieval and refile activity.
- 15.4 Destruction and permanent withdrawal activity
- 15.5 Transportation activity (including on-time statistics)
- 15.6 Special project progress review
- 15.7 Overall program review and recommendations
- 15.8 PG&E special projects/initiatives
- 15.9 Vendor updates

16. Digitization & Project-Based Services

- 16.1 Support for large-scale and ad hoc digitization initiatives
- 16.2 Ability to meet **defined project milestones, timelines, and quality standards.**
- 16.3 Flexible resourcing model scales for enterprise digitization efforts.
- 16.4 Customized Billing to specific functional area contacts within PG&E.
- 16.5 Vendor agrees to collaborate on Field Clean-Up workflow to increase communications and reporting including discrepancies and/or errors that may be discovered during or after processing.

17. SERVICE LEVELS. If in any month Vendor fails to meet the time limits set forth in any section with respect to more than 5% of the Records handled that month, then upon request, PG&E shall be entitled to a credit of charges for said service failures beyond 5% against sums owed to Vendor in that month. The supplier will be required to meet or exceed performance expectations, including but not limited to:

- 17.1 Timely updates to PG&E inventory systems
 - 17.2 Image-on-Demand accuracy & turnaround
-

17.3 On-time delivery and pickup performance

17.4 Achievement of digitization project timelines and milestones

17.5 Status and/or Resolution of tickets submitted to project management leaders or the vendors customer support within 48 hours (Standard); same day (expedites)

Key Outcomes & Expectations

PG&E is seeking a forward-looking partner that will:

- Enhance operational efficiency through **LEAN processing and modern AI technology.**
 - Improve retrieval accuracy through **metadata-driven processes.**
 - Enable seamless integration between physical and digital records ecosystems.
 - Support compliance with PG&E records, governance and regulatory standards.
 - Deliver a scalable, high-performance solution that supports both current operations and future-state transformation.
-

Conduct Requirements:

Suppliers, as well as their employees, subcontractors, and sub-suppliers, must adhere to the principles and standards outlined in our Supplier Code of Conduct as they provide goods and services to PG&E.

Review Code and understand its obligations here:

<http://www.pgecorp.com/corp/about-us/compliance-ethics/program/third-party-code-conduct.page>

How to Respond:

Suppliers interested in participating in this Contract Opportunity must:

- Express interest by registering for the Wood Mackenzie event, by **July 7, 2026**, at:
<https://www.poweradvocate.com/pR.do?okey=242016&pubEvent=true>
- RFP response due date is **August 7, 2026, by 3:00 PM PST.**

NOTE: This Contract Opportunity Announcement is used to solicit and assess supplier capabilities for this RFI. Not all respondents will be invited to bid.

Please register to gain access to Wood Mackenzie to submit your questions (see registration link above).
