

# Memorandum



**Date:** August 8, 2011  
**To:** Department Directors  
**From:** Carlos A. Gimenez  
Mayor  
  
**Subject:** Contracting Data Collection and Maintenance Survey

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On July 7, 2011, the Board approved Resolution No. R-564-11, directing the County Mayor to prepare a feasibility report which includes an assessment of contracting data availability with the ultimate objective of assuring that all segments of the County have a full, fair and meaningful opportunity to participate in County contracting regardless of race, gender or ethnic origin. I support this objective.

In order to compile the data necessary to comply with this Resolution, please complete the attached questionnaires regarding your department's internal procurement and contracting practices and procedures. Completed questionnaires should be emailed to Veronica Clark, Department of Small Business Development at [VMG@miamidade.gov](mailto:VMG@miamidade.gov), no later than Friday, August 12, 2011.

Your cooperation is appreciated. If you have questions or need clarifications, please contact Ms. Clark at 305-375-4770.

Attachment

c: Office of the Mayor Senior Staff  
Penelope Townsley, Director, SBD

Attachments

# DEPARTMENT CONTRACT DATA AVAILABILITY/RETRIEVABILITY

**Below are 25 critical elements needed to analyze contract data availability/retrievability**

**INSTRUCTIONS:** Insert a "1" in the **Availability** column to indicate the contract data element is available and a "0" if the data element is not available.

Insert an "E" in the **Retrievable Format** column to indicate the contract data element is maintained electronically and an "H" if the data element is maintained in hardcopy.

If the contract data element is maintained electronically, please indicate format in the **Electronic Format Type** (Oracle database, FAMIS, ADPICS, excel, etc.)

DEPARTMENT: \_\_\_\_\_

Contact Name \_\_\_\_\_ Phone Number: \_\_\_\_\_

DATA ELEMENT	AVAILABILITY	RETRIEVABLE FORMAT	ELECTRONIC FORMAT TYPE
Contract Number			
Industry Classification/Code			
Award Amount			
Award Date			
Change Order Amount			
Change Order Date			
Change Order Contract Number			
Vendor ID (FEIN Number)			
Vendor Name			
Vendor Address/Zip/E-Mail			
Vendor Business Type			
Vendor/Business Owner's Race/Ethnicity/Gender			
Vendor Link to Contract Number			
Subcontractor ID (FEIN Number)			
Subcontractor Name			
Subcontractor Award/Payments			
Subcontractor Address/Zip/E-Mail			
Subcontractor Services Provided			
Subcontractor/Business Owner's Race/Ethnicity/Gender			
Subcontractor Link to Contract No.			
Contract Number Related to Bids			
Bidders' Business Name			
Bidders' Address/Zip/E-Mail			
Bidder/Business Owner's Race/Ethnicity/Gender			
Bidders' Bid Amount			

## DEPARTMENT DATA LIMITATION ASSESSMENT

**Below are circumstances that may result in contract data availability limitations**

**INSTRUCTIONS:** If the below circumstances apply to your department, insert a "Y" in the **Applicable** column. Insert an "N" if the circumstance does not apply because the data source is not collected and/or maintained.

If you inserted an "N" in the Applicable column, state the reason in the **Comments** column *(you may add comment sheets as needed)*

If the below circumstances do not apply to your department because you do not engage in the particular type contracting, insert "N/A" in the Applicable column.

DEPARTMENT: \_\_\_\_\_

Contact Name \_\_\_\_\_ Phone Number: \_\_\_\_\_

DATA CIRCUMSTANCES	APPLICABLE	COMMENTS <i>(Explain reason for "N" circumstance: anticipated policy and/or procedural changes, future technology, enhancements, timeframe, etc.)</i>
All Contract and Vendor/Contractor related data are maintained in the same database		
Sub-contractors/vendors lists are collected and maintained for each bid and/or contract		
Changes in contract numbers, dates and amounts are updated and/or linked to original contract		
Complete bidders lists/tally sheets are maintained for each contract		
Construction contracts are easily discernible from Architecture/Engineering contracts		
Contract numbers are consistently linked to financial/ payment databases		
Subcontractor data is collected and/or maintained for Design/Build contracts		
Race/gender/ethnicity of business ownership is discernible in bid documents		
Common contract and vendor identification numbers are maintained at each level of the procurement and accounts payable systems		
Payment databases reference NAICS codes to Purchase Orders		
QUESTION	RESPONSE/COMMENT	
How many years of relevant contracting data do you have on site (list specific years/format)?		
How many years of relevant contracting data do you have in archive (list specific years/format)?		