



**CONTRACT AWARD SHEET  
ISD DIVISION OF PROCUREMENT MANAGEMENT**

**BPO# ABCW1500373**

**CONTRACT NO.:** 8191-5/20-3

**PREVIOUS BID NO.:** 8191-5/20-2

**TITLE:** Backfile Conversion and Scanning Services

**Contract Period:** 12/01/2014 through 11/30/2016

**OTR Years:** 3 of 5

**Total Contract Value:** \$ 885,000

**Living Wage Applies:**  YES  NO

**Award Based On Measures:**  YES  NO

**Contract Manager:** Sherry Y. Crockett, Procurement Contracting Officer 1

Phone: (305)3 75-4693

E-Mail: [crocket@miamidade.gov](mailto:crocket@miamidade.gov)

**PART #1: PRE-QUALIFIED VENDOR POOL**

For a list of current vendors, please view the Award Sheet and BPO, which can be found using the link below:

<https://www.miamidade.gov/DPMww/SearchAwardSheetAttachments.aspx?ContractId=8191-5/20-3>

**PART #2: ITEMS AWARDED ON CONTRACT**

**Available Services:**

**Category A – Backfile Conversion**

**Category B – Scanning Services**

**Category C – Other Scanning Services**

## **PROCEDURES AND INSTRUCTIONS FOR USER DEPARTMENTS**

This Roadmap was designed to assist County Departments wishing to acquire Backfile Conversion and/or Scanning Services from the Pre-Qualified list of vendors through a Request for Quotation (RFQ) process. Each RFQ issued under this solicitation shall be consistent with AO No.3-38, "Master Procurement Administrative Order." Individual work orders issued under the pool, valued above \$1 million, shall be presented by ISD Procurement Management Services to the Board of County Commission for approval award.

**Applicable Ordinances:** Local and Locally Headquartered Preference, Bid Preference, Cone of Silence, UAP & Inspector General Ordinances shall be applicable to each RFQ issued under this contract.

**Bid Preference:** For awards valued up to and including \$100,000, a 10% (ten percent) bid preference shall apply for certified Micro Business Enterprise (Micro) bidders. For awards valued over \$100,000 and up to \$1,000,000, a 10% (ten percent) bid preference shall apply for certified Micro and SBE bidders. For awards valued over \$1,000,000, a 5% (five percent) bid preference shall apply for certified Micro and SBE bidders. Micro Business Enterprises and Small Business Enterprises must be certified by Small Business Development under Business Affairs, a division of the Department of Regulatory and Economic Resources (RER) for the type of goods and/or services the enterprise provides in accordance with the applicable commodity code(s) for this solicitation. A Micro Business Enterprise is a certified SBE firm whose three year average gross revenues does not exceed \$2 million, or is a manufacturer with fifty (50) employees or less, or is a wholesaler with fifteen (15) employees or less. For certification information, contact RER at 305-375-CERT (2378) or at <http://www.miamidade.gov/business/business-certificationprograms.asp>.

**Insurance Requirements:** If a project requires the vendor to perform services on-site (at a County property), the requesting County Department must first verify with the Department of Procurement Management (DPM) that the vendor has provided an insurance certificate meeting the requirements of this contract prior to work commencing.

**Record Retention:** For each purchase order issued under this contract, the User department shall maintain a record of the purchase including: all quotes and proposals sought, all quotes and proposals obtained, required exception forms, the Purchase Order and any other documentation supporting each purchase, in order to ensure compliance and establish the necessary accountability for audit purposes. The records shall be maintained by the User department in a location (either electronic or paper) easily accessible for purposes of review or audit. Due to that Purchase Order releases under this contract will be done by the End-Users, copies of all Purchase Orders will be furnished to the User department in order to facilitate centralization and accessibility to all documents. The End-User must also keep a copy of all documents in the same manner.

**County Legal Requirements:** Please note that all County procurement legislation and legal requirements apply to this contract and to the solicitation and award of each Purchase Order, including the Local Preference ordinance, which currently must also be applied to Broward County vendors; Bid Preference; Cone of Silence; User Access Program (UAP) fees; and Inspector General (IG) fees. For detailed information about these requirements, please read the "Instructions to Bidders" page attached to the Request for Quote Form.

## **USER DEPARTMENT RESPONSIBILITY**

It is the responsibility of the User and End-User Department Directors to ensure compliance with the above-mentioned procedures. Purchases under this contract will be subject to random review or audit by County authorities, including the Department of Procurement Management, Department of Human Resources, Audit and Management, and the Office of the Inspector General.

**Award Sheet Information:** The Award Sheet with the latest instructions, forms, addenda, and BPO information will be maintained at the Department of Procurement Management (DPM) web-site at:

<https://www.miamidade.gov/DPMww/SearchAwardSheetAttachments.aspx?ContractId=8191-5/20-3>

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## **REQUEST FOR QUOTATION PROCESS AND AWARD METHOD**

When scanning requirements are identified by the County, the pre-qualified vendors shall be invited to offer a proposal in response to a Request for Quotes (RFQ) (**FORM A**), which will be generated by the County.

The County reserves its absolute right to reject any and all bids submitted. As part of the RFQ process, the County will advise the pre-qualified bidders of the method that will be used to select the successful proposal:

- 1) When price is the only determinant, the vendor offering the lowest responsive and responsible proposal will be selected to begin developing a mutually agreeable Statement of Work that is consistent with the terms established under this Contract and specifications in the Request for Quotes. The County's decision as to what constitutes a responsive, and responsible proposal shall be final; or
- 2) When qualitative considerations are part of the selection process, as well as pricing, then a panel established by the County will conduct an evaluation process. The panel will rank the proposals based on the established criteria, and will subsequently begin negotiating a Statement of Work with the vendor whose proposal was the highest ranked. If the County and the highest ranked vendor cannot achieve contract with respect to the Statement of Work, then at the County's option, the County will begin negotiations with the next highest ranked vendor, or begin a new solicitation process.

Pricing submitted with proposals, in response to the County's Request for Quotes must be held fixed for a period of no less than 60 calendar days, to allow for time to award the project. If the project is not awarded within 60 calendar days, the County will allow the apparent lowest bidder the opportunity to extend such prices for another 30 calendar day period. If the vendor is unable to extend such prices, then the County shall issue a new Request for Quotes for the same project.

Pre-qualified vendors are required to submit bona fide proposals in response to Requests for Quotes issued by the County. Failure to respond to three or more Requests for Quotes for which the vendor has been pre-qualified, within a twelve-month period may result in vendor being removed from the pool of pre-qualified vendors. .

When less than three bona fide responses to Requests for Quotes are received, the County, at its option may reject the responses and issue a new Requests for Quotes, use another procurement instrument to acquire the services, or seek to negotiate the prices with the vendor offering the lowest or only price as a result of the solicitation.

Category A – Backfile Conversion

Category B – Scanning Services

Category C – Other Scanning Services

### **Bid Ceiling Rates:**

The bidder's rates shall not exceed the Bid Ceiling Rate quoted in the original bid in Category A "Backfile Conversion and Scanning Services", Category B "Scanning Services", and Category C "Other Scanning Services". ***Each Statement of Work solicited under this contract will require the vendor to provide pricing for the required tasks. Responses which contain prices higher than the Bid Ceiling Rates listed below will be considered non-responsive and will not be evaluated by the Department.***

### **PRIOR TO AWARD**

Prior to making an award under this pool, departments are reminded to:

- Obtain a signed Collusion Affidavit from the vendor to be recommended for award.
- Check that the recommended vendor is responsible, including checking the Pre-Award Vendor Website at <http://intra.miamidade.gov/procurement/vendor-compliance.asp>. Department may want to include a check of the vendor's performance history in BTS. (Go to Vendors Home Page, click on Registered Vendors, locate the vendor, in that vendor's profile, click on the Non.Perf.Hist. button.)
- In your notice to participants of the of the quote results, copy the Clerk of the Board (clerkbcc@miamidade.gov) and include language advising the vendor that the Cone of Silence is lifted.

(sample language - In accordance with the referenced solicitation, and Section 2-8.4 of the Code of Miami-Dade County, you are hereby notified that the \_\_\_ department, recommends award of this quote to: \_\_\_\_\_. Our provision of this notice also serves to confirm the lifting of the Cone of Silence from this procurement action as dictated by Section 2-11.1(t) of the County Code.)

Allow a three business day protest period, beginning the day after the award recommendation is posted with the Clerk and notification is sent to all participants.



**FORM A**

**REQUEST FOR QUOTATION (RFQ)**

## REQUEST FOR QUOTATION - FORM A

**GENERAL TERMS AND CONDITIONS:**

All general terms and conditions of Miami-Dade County Procurement Contracts are posted online. Bidders/Proposers that receive an award through Miami-Dade County's competitive procurement process must anticipate the inclusion of these requirements in the resultant Contract. These standard general terms and conditions are considered non-negotiable subject to the County's final approval.

All applicable terms and conditions pertaining to this solicitation and resultant contract may be viewed online at the Miami-Dade County Procurement Management website by clicking on the below link:

<http://www.miamidade.gov/procurement/library/boilerplate/general-terms-and-conditions-r15-3.pdf>

<b>REQUEST FOR QUOTATION (RFQ)</b> <i>(This is not an order)</i>	<b>Contract # 8191-5/20-3</b>  <b>Backfile Conversion and Scanning Services</b>	<u>Page of Pages</u>	
		1	
<b>RFQ NO:</b>	<b>DATE ISSUED:</b>	<b>QUOTES DUE DATE:</b>	
<b>REQUESTING DEPARTMENT INFORMATION</b>			
<b>DEPARTMENT: xx</b>		<b>CONTACT PERSON: xx</b>	
<b>TELEPHONE NO.: x</b>	<b>FAX:</b>	<b>E-MAIL: xx</b>	
<b>ADDRESS: xx</b>			
<b>QUOTES REQUESTED FROM:</b>			
<b>NAME:</b>			

<b>FEI NO:</b>	<b>IMPORTANT:</b> All deliveries are to be FOB Destination. This is a RFQ and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it to the address as referenced for the receipt of quotes. This request does not commit MIAMI-DADE COUNTY to pay any costs incurred in the preparation of the submission on this quotation or to contract for supplies and services. The quoter must complete and submit requested documentation and/or certification and attach to this RFQ.
<b>TELEPHONE NO:</b>	
<b>FAX NO:</b>	
<b>E-MAIL:</b>	

**QUOTE INFORMATION:**

**STATEMENT OF WORK:** Attached

**Delivery and pickup details**

**Delivery address:** xx

<b>Item No.:</b>	<b>Commodity/Service Description</b>	<b>Commodity Code No.</b>	<b>Quantity</b>	<b>Unit Price</b>	<b>Total</b>
I.		920-38			
II.		920-38			

**BIDDER INFORMATION**

**Name of Bidder:** \_\_\_\_\_  
(type or print)

**Authorized Signature:**

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

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

**City:** \_\_\_\_\_ **State** \_\_\_\_\_

**Payment Terms:** \_\_\_\_\_

**Zip Code:** \_\_\_\_\_

**Tel:** \_\_\_\_\_

**Quote Valid for:** \_\_\_\_\_ **Days**

**Fax:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_

## **INSTRUCTIONS TO BIDDERS**

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1. A sealed quote is not required, thus the bidder may submit its written quotation by fax, mail, or e-mail (provided that it includes a scanned signed quote), to the Specialist identified on the attached form, unless otherwise specified.
2. Quotes received after the time and date specified, and after any other quotes have been opened shall not be accepted.
3. Bidder shall insert unit price and extension, as required, opposite each item. Where the unit price and the extension price are at variance, the unit price shall prevail.

### **Legal Requirements**

Bidders are advised that this contract is subject to all legal requirements contained in the County's Administrative Order 3-28 and all other applicable County Ordinances and/or State and Federal Statutes. Where conflicts exist between this Request for Quotes and these legal requirements, the higher authority shall prevail.

### **Local Preference**

The evaluation of competitive bids is subject to Section 2-8.5 of the Miami-Dade County Code, which, except where contrary to federal and state law, or any other funding source requirements, provides that preference be given to local businesses.

#### **A. A Local Business shall be defined as:**

1. a business that has a valid Local Business Tax Receipt, issued by Miami-Dade County at least one year prior to bid or proposal submission;
2. a business that has physical business address located within the limits of Miami-Dade County from which the vendor operates or performs business. Post Office Boxes are not verifiable and shall not be used for the purpose of establishing said physical address; and
3. a business that contributes to the economic development and well-being of Miami-Dade County in a verifiable and measurable way. This may include but not be limited to the retention and expansion of employment opportunities and the support and increase in the County's tax base. To satisfy this requirement, the vendor shall affirm in writing its compliance with either of the following objective criteria as of the bid or proposal submission date stated in the solicitation:
  - (a) vendor has at least ten (10) permanent full time employees, or part time employees equivalent to 10 FTE ("full-time equivalent" employees working 40 hours per week) that live in Miami-Dade County, or at least 25% of its employees that live in Miami-Dade County, or
  - (b) vendor contributes to the County's tax base by paying either real property taxes or tangible personal property taxes to Miami-Dade County, or
  - (c) some other verifiable and measurable contribution to the economic development and well-being of Miami-Dade County.

**B. Additionally, a Locally-Headquartered Business shall mean a Local Business as defined above which has a "principal place of business" in Miami-Dade County. "Principal place of business" means *the nerve center or the center of overall direction, control, and coordination of***

*activities of the bidder.* If the bidder has only one business location, such business location shall be its principal place of business.

**C.** If the Low Bidder is a not a Local Business, then any and all responsive and responsible Local Businesses submitting a price within ten percent of the Low Bid, the Low Bidder, and any and all responsive and responsible Locally-Headquartered Businesses submitting a price within fifteen percent of the Low Bid, shall have an opportunity to submit a best and final bid equal to or lower than the Low Bid.

**D.** If the Low Bidder is a Local Business which is not a Locally- Headquartered Business, then any and all responsive and responsible Locally Headquartered Businesses submitting a price within five percent of the Low Bid, and the Low Bidder shall have an opportunity to submit a best and final bid equal to or lower than the Low Bid.

**E.** At this time, there is an interlocal agreement in effect between Miami-Dade and Broward Counties until September 2013. Therefore, a vendor which meets the requirements of (1), (2) and (3) above for Broward County shall be considered a Local Business pursuant to this Section.

**Bid Preference:**

For awards valued up to and including \$100,000, a 10% (ten percent) bid preference shall apply for certified Micro Business Enterprise (Micro) bidders. For awards valued over \$100,000 and up to \$1,000,000, a 10% (ten percent) bid preference shall apply for certified Micro and SBE bidders. For awards valued over \$1,000,000, a 5% (five percent) bid preference shall apply for certified Micro and SBE bidders. Micro Business Enterprises and Small Business Enterprises must be certified by Small Business Development under Business Affairs, a division of the Department of Regulatory and Economic Resources (RER) for the type of goods and/or services the enterprise provides in accordance with the applicable commodity code(s) for this solicitation. A Micro Business Enterprise is a certified SBE firm whose three year average gross revenues does not exceed \$2 million, or is a manufacturer with fifty (50) employees or less, or is a wholesaler with fifteen (15) employees or less. For certification information, contact RER at 305-375-CERT (2378) or at <http://www.miamidade.gov/business/business-certificationprograms.asp>.

**Cone of Silence**

Pursuant to Section 2-11.1(t) of the County Code, this RFQ is subject to the "Cone of Silence" until an award recommendation has been forwarded to the appropriate authority. Any communication or inquiries, except for clarification of process or procedure already contained in the solicitation, are to be made in writing to the attention of the Specialist identified on the cover page of the Award Sheet. Such inquiries or request for information shall be submitted to the procurement specialist in writing and shall contain the requester's name, address, and telephone number. If transmitted by facsimile, the request should also include a cover sheet with Bidder's facsimile number. The requestor must also file a copy of this written request with the Clerk of the Board, 111 NW 1<sup>st</sup> Street, 17<sup>th</sup> Floor, suite 202, Miami, Florida 33128-1983 or email [clerkbcc@miamidade.gov](mailto:clerkbcc@miamidade.gov).

**County User Access Program (UAP) - User Access Fee**

Pursuant to Miami-Dade County Budget Ordinance No. 03-192, this quote and any resulting order is subject to a user access fee under the County User Access Program (UAP) in the amount of two percent (2%). The vendor providing goods or services under this contract shall invoice the contract price and shall accept as payment thereof the contract price less the 2% UAP as full and complete payment for the goods and/or services specified on the invoice. The

County shall retain the 2% UAP for use by the County to help defray the cost of the procurement department. Vendor participation in the UAP is mandatory.

**Office of the Inspector General**

Miami-Dade County has established the Office of the Inspector General, which is authorized and empowered to review past, present, and proposed County and Public Health Trust programs, contracts, transactions, accounts, records and programs. The Inspector General (IG) has the power to subpoena witnesses, administer oaths, require the production of records and monitor existing projects and programs. The Inspector General may, on a random basis, perform audits on all County contracts. The cost of random audits shall be incorporated into the contract price of all contracts and shall be one quarter (1/4) of one (1) percent of the contract price, except as otherwise provided in Section 2-1076(c)(8) of the County Code.

For additional details of the ordinances mentioned above, please visit the Department of Procurement Management web site at: <http://www.miamidade.gov/dpm>