

**DEPARTMENTAL INPUT  
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION**

Rev 1

**New contract**   
  **OTR**   
  **CO**   
  **SS**   
  **BW**   
  **Emergency**   
 Previous Contract/Project No: 9494-0/14

**Re-Bid**   
  **Other**   
 LIVING WAGE APPLIES: \_\_\_ YES \_\_\_x\_\_\_ NO

Requisition/Project No: **ROID1400038**   
 TERM OF CONTRACT: **5** years  
 Requisition/Project Title: **Commercial Records Management Services**

Description: To establish a contract for Commercial Records Management Services include storage, retrieval, delivery of file folders/boxes, vault storage, permanent out materials, and imaging scanning.

User Department(s): AV \$100,000; ITD \$31,000; ID11 HR \$30,000; ID Procurement -\$20,000; ID05 Risk \$42,000; ME- \$500,000; PA -\$18,000 and PE04 - \$11,200  
 Issuing Department: Internal Services Dept. Procurement Mgmt. Services Division.   
 Contact Person: SEE Below:  
 Estimated Cost: \$934,000   
 Funding Source: AV – Neivy Garcia, Proprietary 305-876-4282

ITD, Manny Fernandez, Internal Services – 305-596-8103  
 ID11-HR – General Fund – Edsel Abreu - 305-375-4058  
 ID, Procurement – General Fund - Edsel Abreu – 305-375-4058  
 ID05-Risk – Susana Ramirez – Insurance Trust - 305-375-3062  
 PE04 – Manny Almuina, Operating and Revenue and Proprietary– 305-372-6785  
 PA, JC Romano – General Funds -\$30,000 305-375-4262  
 ME – Aylin Concepcion – General Fund – 305-547-5721

**ANALYSIS**

Commodity/Service No: 962-95,958-82, 962-69		SIC:	
<b>Trade/Commodity/Service Opportunities</b>			
Contract/Project History of Previous Purchases For Previous Three (3) Years Check Here <input type="checkbox"/> if this is a New Contract/Purchase with no Previous History			
	<b>EXISTING</b>	<b>2<sup>ND</sup> YEAR</b>	<b>3<sup>RD</sup> YEAR</b>
Contractor:			
Small Business Enterprise:			
Contract Value:			
Comments:			
Continued on another page (s): ___ Yes ___X___ No			

**RECOMMENDATIONS**

SBE	Set-Aside	Sub-Contractor Goal	Bid Preference	Selection Factor
		%		
		%		
		%		
		%		

Basis of Recommendation:

Signed: *Constance Thomas*

Date to DBD: 1/15/14  
 Date Returned to DPM: \_\_\_\_\_

RECEIVED  
 DEPT. BUSINESS DEV.  
 JAN 15 PM 4:45  
 2014

**DEPARTMENTAL INPUT  
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION**

Rev 1

**New contract**   
  **OTR**   
  **CO**   
  **SS**   
  **BW**   
  **Emergency**   
 Previous Contract/Project No: 9494-0/14

**Re-Bid**   
  **Other**   
 LIVING WAGE APPLIES: \_\_\_ YES \_\_\_ x \_\_\_ NO

Requisition/Project No: RQID1400038   
 TERM OF CONTRACT: 5 years  
 Requisition/Project Title: Commercial Records Management Services

Description: To establish a contract for Commercial Records Management Services include storage, retrieval, delivery of file folders/boxes, vault storage, permanent out materials, and imaging scanning.

User Department(s): AV \$100,000; ITD \$31,000; ID11 HR \$30,000; ID Procurement -\$20,000; ID05 Risk \$42,000; ME- \$500,000; PA -\$18,000 and PE04 - \$11,200  
 Issuing Department: Internal Services Dept. Procurement Mgmt. Services Division.  
 Estimated Cost: \$934,000

Contact Person: SEE Below:  
 Funding Source: AV – Neivy Garcia, Proprietary 305-876-4282  
 ITD, Manny Fernandez, Internal Services – 305-596-8103  
 ID11-HR – General Fund – Edsel Abreu - 305-375-4058  
 ID, Procurement – General Fund - Edsel Abreu – 305-375-4058  
 ID05-Risk – Susana Ramirez – Insurance Trust - 305-375-3062  
 PE04 – Manny Almuina, Operating and Revenue and Proprietary– 305-372-6785  
 PA, JC Romano – General Funds -\$30,000 305-375-4262  
 ME – Aylin Concepcion – General Fund – 305-547-5721

**ANALYSIS**

Commodity/Service No: 962-95,958-82, 962-69		SIC:	
<b>Trade/Commodity/Service Opportunities</b>			
Contract/Project History of Previous Purchases For Previous Three (3) Years Check Here <input type="checkbox"/> if this is a New Contract/Purchase with no Previous History			
	<b>EXISTING</b>	<b>2<sup>ND</sup> YEAR</b>	<b>3<sup>RD</sup> YEAR</b>
Contractor:			
Small Business Enterprise:			
Contract Value:			
Comments:			
Continued on another page (s): ___ Yes ___ X ___ No			

**RECOMMENDATIONS**

SBE	Set-Aside	Sub-Contractor Goal	Bid Preference	Selection Factor
		%		
		%		
		%		
		%		

Basis of Recommendation:

Signed: *Constance Thorne*

Date to DBD: 1/15/14  
 Date Returned to DPM: \_\_\_\_\_

RECEIVED  
 DEPT. BUSINESS DEV.  
 2014 JAN 15 PM 4:45



**BID NO.: DRAFT 10/ /13**

**OPENING: 5:00 P.M.**

**, 2014**

**MIAMI-DADE COUNTY, FLORIDA**

**I N V I T A T I O N  
T O B I D**

**TITLE:**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**FOR INFORMATION CONTACT:**

**Constance Thame, 305-375-1078, [cthame@miamidade.gov](mailto:cthame@miamidade.gov)**

**IMPORTANT NOTICE TO BIDDERS:**

- **READ THIS ENTIRE DOCUMENT, THE GENERAL TERMS AND CONDITIONS, AND HANDLE ALL QUESTIONS IN ACCORDANCE WITH THE TERMS OUTLINED IN PARAGRAPH 1.2(D) OF THE GENERAL TERMS AND CONDITIONS.**
- **FAILURE TO SIGN BID SUBMITTAL FORM IN SECTION 4 WILL RENDER YOUR BID NON-RESPONSIVE**

**MIAMI-DADE COUNTY  
INTERNAL SERVICES DEPARTMENT  
PROCUREMENT MANAGEMENT SERVICES DIVISION**



MIAMI-DADE COUNTY, FLORIDA

INVITATION TO BID

Bid Number:

Bid Title: COMMERCIAL RECORDS MANAGEMENT SERVICES

Procurement Officer: Constance Thame, CPPB

Bids will be accepted until 5:00 p.m. on \_\_\_\_\_, 2014

**Bids will be publicly opened.** The County provides equal access and does not discriminate on the basis of disability in its programs or services. It is our policy to make all communication available to the public, including those who may be visually or hearing impaired. If you require information in a non-traditional format please call 305-375-5278.

**Instructions:** The Clerk of the Board business hours are 8:00 a.m. to 4:30 p.m., Monday through Friday. Additionally, the Clerk of the Board is closed on holidays observed by the County. Each Bid submitted to the Clerk of the Board shall have the following information clearly marked on the face of the envelope: Bidder's name, return address, Bid number, opening date of the Bid, and the title of the Bid. Included in the envelope shall be an original and two (2) copies of the Bid Submittal, plus attachments, if applicable.

All Bids received time and date stamped by the Clerk of the Board prior to the Bid submittal deadline shall be accepted as timely submitted. The circumstances surrounding all Bids received and time stamped by the Clerk of the Board after the Bid submittal deadline will be evaluated by the procuring department, in consultation with the County Attorney's Office, to determine whether the Bid will be accepted as timely.

**NOTICE TO ALL BIDDERS:**

- **FAILURE TO SIGN THE BID SUBMITTAL FORM WILL RENDER YOUR BID NON-RESPONSIVE.**
- **THE BID SUBMITTAL FORM CONTAINS IMPORTANT CERTIFICATIONS THAT REQUIRE REVIEW AND COMPLETION BY ANY BIDDER RESPONDING TO THIS SOLICITATION.**

MIAMI-DADE COUNTY  
INTERNAL SERVICES DEPARTMENT  
PROCUREMENT MANAGEMENT SERVICES DIVISION

SECTION 1  
GENERAL TERMS AND CONDITIONS

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

All general terms and conditions of Miami-Dade County procurement contracts for Invitations to Bid are posted online. Persons and companies that receive an award from Miami-Dade County 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 Services Division website by clicking on the link below:

<http://www.miamidade.gov/procurement/library/boilerplate/general-terms-and-conditions-r13-8.pdf>

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**2.1 PURPOSE**

The purpose of this Solicitation is to establish a Contract for commercial records management services including storage, retrieval, delivery of file folders/boxes archive boxes, vault storage, permanent out materials, and imaging/scanning, in conjunction with various Miami-Dade County departments, on an "as-needed" basis.

**2.2 TERM OF CONTRACT: FIVE (5) YEARS**

This Contract shall commence on the first calendar day of the month succeeding approval of the Contract by the Board of County Commissioners, or designee, unless otherwise stipulated in the Notice of Award Letter, which is distributed by the County's Procurement Management Services Division, and contingent upon the completion and submittal of all required Bid documents. The Contract shall expire on the last day of the sixtieth (60<sup>th</sup>) month of the Contract Term.

**2.3 METHOD OF AWARD: TWO (2) LOWEST PRICED BIDDERS IN THE AGGREGATE**

Award of this Contract will be made to up to two (2) responsive and responsible Bidders who submit an offer on all items listed in the Solicitation and whose offer represents the lowest price when all services and items are added in the aggregate. The lowest-priced responsive and responsible Bidder in the aggregate shall be designated as the Primary Awarded Bidder and the second-lowest priced responsive and responsible Bidder in the aggregate shall be designated as the Secondary Awarded Bidder. While the County will award to multiple Bidders to assure availability, for the County's convenience, the Primary Bidder shall have the primary responsibility to deliver under the Contract. This multiple award does not exempt awarded Bidders from fulfilling their contractual obligations. An Awarded Bidder, Primary or Secondary, that fails to perform in accordance with Contract requirements may be terminated in accordance with Sections 1.24 and/or 1.25 of the General Terms and Conditions and/or charged re-procurement costs.

**2.3.1 Minimum Qualifications:**

To be considered for award, Bidder(s) must meet the following requirements:

**2.3.1.1** Be regularly engaged in the business of providing commercial records management services as required in this Solicitation. As proof, Bidder(s) will provide three (3) references (see Section 4) to whom the Bidder has provided services as those described in this Solicitation for a period of at least two (2) years. The references must include the customer's name, contact person's name, title address and telephone number and the person's name that is able to verify that the Bidder has successfully provided the offered services. These references shall ascertain to the County's satisfaction that the Awarded Bidder(s) has sufficient experience and expertise in the commercial records management services.

**2.3.1.2** Provide the firm's primary contact name, e-mail address, telephone number, fax number, cellular phone number and company main phone number.

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

- 2.3.1.3** Have storage facilities located in Miami-Dade County, Florida, that can provide the record management services.

**2.4** **PRICES**

The prices proposed by the Awarded Bidder(s) shall remain fixed for a period of one (1) year after the commencement of the Contract. After this period, the Awarded Bidder(s) may submit a price adjustment request annually to the County based on the most recent annual index of the following: **Consumer Price Index (CPI), All Urban Consumers, All Items, Miami/Ft. Lauderdale Area.**

It is the Awarded Bidder's responsibility to request any price adjustment under this provision. For any adjustment to be considered, it must be submitted ninety (90) days prior to expiration of the then one (1) year period. If no price adjustment request is received from the Awarded Bidder(s), the County will assume that the Awarded Bidder(s) has agreed to continue the Contract at the then current rate.

The County reserves the right to negotiate lower pricing for any subsequent one year (1) period based on market research information or other factors that influence price. The County reserves the right to apply any reduction in pricing for the one (1) year period based on the downward movement of the applicable index.

The County reserves the right to reject any price adjustments submitted by the Awarded Bidder(s).

**2.5** **INDEMNIFICATION AND INSURANCE – GENERAL SERVICE AND MAINTENANCE**

Contractor shall indemnify and hold harmless the County and its officers, employees, agents and instrumentalities from any and all liability, losses or damages, including attorneys' fees and costs of defense, which the County or its officers, employees, agents or instrumentalities may incur as a result of claims, demands, suits, causes of actions or proceedings of any kind or nature arising out of, relating to or resulting from the performance of this Agreement by the Contractor or its employees, agents, servants, partners principals or subcontractors. Contractor shall pay all claims and losses in connection therewith and shall investigate and defend all claims, suits or actions of any kind or nature in the name of the County, where applicable, including appellate proceedings, and shall pay all costs, judgments, and attorney's fees which may issue thereon. Contractor expressly understands and agrees that any insurance protection required by this Agreement or otherwise provided by Contractor shall in no way limit the responsibility to indemnify, keep and save harmless and defend the County or its officers, employees, agents and instrumentalities as herein provided.

The Awarded Bidder(s) shall furnish to Vendor Assistance Section, Procurement Management Services, 111 NW 1<sup>st</sup> Street, Suite 1300, Miami, Florida 33128, Certificate(s) of Insurance which indicate that insurance coverage has been obtained which meets the requirements as outlined below:

- A. Worker's Compensation Insurance for all employees of the Contractor as required by Florida Statute 440.

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

- B. Commercial General Liability Insurance on a comprehensive basis, in an amount not less than \$1,000,000 combined single limit per occurrence for bodily injury and property damage. **Miami-Dade County must be shown as an additional insured with respect to this coverage.**
- C. Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the work, in an amount not less than \$500,000 combined single limit per occurrence for bodily injury and property damage.

All insurance policies required above shall be issued by companies authorized to do business under the laws of the State of Florida, with the following qualifications:

The company must be rated no less than "B" as to management, and no less than "Class V" as to financial strength by Best's Insurance Guide, published by A.M. Best Company, Oldwick, New Jersey, or its equivalent, subject to the approval of the County Risk Management Division.

or

The company must hold a valid Florida Certificate of Authority as shown in the latest "List of All Insurance Companies Authorized or Approved to Do Business in Florida" issued by the State of Florida Office of Insurance Regulation.

Certificates will indicate no modification or change in insurance shall be made without thirty (30) days in advance notice to the certificate holder.

**CERTIFICATE HOLDER MUST READ: MIAMI-DADE COUNTY  
111 NW 1<sup>ST</sup> STREET  
SUITE 2340  
MIAMI, FL 33128**

**2.6 METHOD OF PAYMENT: MONTHLY INVOICES**

The Awarded Bidder(s) shall submit monthly invoices by the tenth (10th) calendar day of each month. These invoices shall be submitted to the County user department(s) that requested the service through a purchase order. The invoices shall reflect the type of service provided to the County in the prior month.

All invoices shall contain the following basic information:

- I. Awarded Bidder(s) Information:
- The name of the business organization as specified on the Contract between Miami-Dade County and Awarded Bidder(s)
  - Date of invoice
  - Invoice number
  - Awarded Bidder's Federal Identification Number on file with Miami-Dade

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

County

- II. County Information:
  - Miami-Dade County Release Purchase Order or Small Purchase Order Number
- III. Pricing Information:
  - Unit price of the goods, services provided
  - Extended total price of the goods or services
  - Applicable discounts
- IV. Goods or Services Provided per Contract:
  - Description
  - Quantity

**2.7 CONTACT PERSONS**

For any additional information regarding the terms and conditions of this Solicitation and resultant Contract, please contact Constance Thame at (305) 375-1078 or [cthame@miamidade.gov](mailto:cthame@miamidade.gov).

**2.8 SERVICES MAY BE ADDED OR DELETED**

It is hereby agreed and understood that additional goods/services may be added to this Contract at the County's option. It is also agreed and understood that the County may add or delete goods/services on this Contract at the County's option. Awarded Bidder(s) under this Contract shall be invited to submit price quotes for these additional goods/services. If these quotes are determined to be fair and reasonable, then the additional goods/services will be awarded to the current contracted Bidder(s) that offers the lowest acceptable pricing.

**SECTION 3**  
**TECHNICAL SPECIFICATIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**3.1 BACKGROUND**

The purpose of this Solicitation is to establish a Contract for commercial records management services including storage, retrieval, delivery of file folders/boxes archive boxes, vault storage, permanent out materials, and imaging/scanning, in conjunction with various Miami-Dade County departments, on an "as-needed" basis. Awarded Bidder(s) must also have designated staff, working telephones, separate facsimile lines and/or email addresses to expedite quotes.

**3.2 STORAGE FACILITY REQUIREMENTS**

Awarded Bidder(s) storage facility shall:

- a. Have floor space to accommodate a minimum of five hundred (500) cardboard boxes (boxes are approximately 12 ½" wide 16" long x 10" high) at any given time. The County reserves the right to change or alter the size and type of boxes.
- b. Be an individual structure separated from other buildings and external hazards to ensure a high degree of safety from fire, flood, and other potential hazards.
- c. Be located above the local flood plain and be constructed of concrete, masonry, or steel that meets all National Fire Prevention Standards (NFPS). All firewalls must be structurally sound and capable of withstanding impact and imposed loads if severe fire exposure would cause collapse of the framing on one wall. All openings in the firewalls must be protected on each side by fire doors suitable for immediate openings. All walls separating records storage areas from each other and from other portions of the facility shall consist of four (4) fire resistant walls.
- d. Maintain a controlled environment for humidity. For security of the County files, the facility must be secured and provide protection against unauthorized intrusion and access to the County's stored records.
- e. Have a fire sprinkler system that meets all national, County and Local Fire Code Standards, with smoke detectors and heat sensors, except for vault storage area, which must use inert gas suppression.
- f. Have no windows in any stack areas.
- g. Have shelving that must be of fire retardant, chemically neutral, steel construction. Bottom shelves shall be at least two and one fifth (2-1/5") inches from the floor.
- h. Be clean, well organized, and free of rodent and pest infestation.
- i. Possess a twenty-four (24) hour interior and exterior security system electronically linked to local police and fire departments.
- j. Be insured against damages or loss to stored property. Refer to Section 2.5 of this Solicitation.
- k. Provide for goods to be stored adequately, ventilated, and must have heat and smoke detectors in areas where County files are stored.

**SECTION 3**  
**TECHNICAL SPECIFICATIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**3.3 SERVICES TO BE PROVIDED**

Awarded Bidder(s) shall:

- a. Create/possess and utilize an in-house records indexing/cataloging system for expedited retrieval. Awarded Bidder(s) shall be required to work with the County in developing an inventory acceptable to the County and which will best service the County's needs.
- b. Have capability to dispose/destroy records and provide certification records of destruction requests to the County.
- c. Have an online base ordering system that allows the County to place orders electronically.
- d. Have the capability and ability to receive purchase orders/releases via e-mail or fax and provide goods/services as requested in the purchase order/release.
- e. Charge and invoice Miami-Dade County by box, item requested, and not by cubic feet.
- f. Comply with the following regulations:
  1. Florida Administrative code rules 1B24 and 1B26 for Public Records Scheduling and Deposition to include Electronic Recordkeeping  
<http://info.florida.gov/barm/rules/1B24FAC.cfm>  
[www.flclerks.com/Pub\\_info/2003\\_pdf/1B26\\_003FAC.pdf](http://www.flclerks.com/Pub_info/2003_pdf/1B26_003FAC.pdf)
  2. Florida Statute 119 - Public Records  
<http://www.flsenate.gov/Laws/Statutes/2010/Chapter119>
- g. Comply with a 30-60 day transition period, as the material kept in storage may need to be transferred from the incumbent facility to the Awarded Bidder's location. The transition period will minimize service interruptions to the County user departments.

**3.3.1 PICK-UP, DELIVERY, RETRIEVAL AND NEW ADDITIONS**

Awarded Bidder(s) shall:

- a. Provide initial pick-up per box/pallet from designated sites County owned and/or operated.
- b. Provide additional pick-up per box/pallet from designated sites County owned and/or operated.
- c. Provide deliveries per box to designated sites County owned and/or operated.
- d. Provide barcode sheet (16 barcode per sheet) record management.
- e. Provide boxes for additional records to be stored.
- f. Provide retrieval and refiling per box/pallet.

**SECTION 3**  
**TECHNICAL SPECIFICATIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

g. Provide emergency delivery per box/pallet.

**3.3.2 MONTHLY WAREHOUSE STORAGE**

The awarded Bidder(s) shall provide monthly warehouse storage per box/pallet.

**3.3.3 DOCUMENT DESTRUCTION**

The awarded Bidder(s) shall provide document destruction consisting of permanent out retrieval and materials.

**3.3.4 RETENTION SERVICES**

The awarded Bidder(s) shall:

- a. Provide scanning retention services.
- b. Provide digital storage per user department at Miami-Dade County's request.

**SECTION 4  
BID SUBMITTAL FORM**

**Submit Bid To:**  
**CLERK OF THE BOARD**  
**Stephen P. Clark Center**  
**111 NW 1<sup>st</sup> Street**  
**17<sup>th</sup> Floor, Suite 202**  
**Miami, Florida 33128-1983**

**OPENING: 2:00 P.M.**  
**, 2014**



**PLEASE QUOTE PRICES F.O.B. DESTINATION, FREIGHT ALLOWED, LESS TAXES,  
DELIVERED IN MIAMI-DADE COUNTY, FLORIDA.**

NOTE: Miami-Dade County is exempt from all taxes (Federal, State, Local). Bid price should be less all taxes. Tax Exemption Certificate furnished upon request.

Issued by: ct                      ISD/PM                      Date Issued:                      This Bid Submittal Consists of Pages 8 thru 13 + Affidavits

Sealed bids subject to the Terms and Conditions of this Invitation to Bid and the accompanying Bid Submittal. Such other Contract provisions, specifications, drawings or other data as are attached or incorporated by reference in the Bid Submittal, will be received at the office of the Clerk of the Board at the address shown above until the above stated time and date, and at that time, publicly opened for furnishing the supplies or services described in the accompanying Bid Submittal Requirement.

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

A Bid Deposit in the amount of **NA** the total amount of the bid shall accompany all bids.

A Performance Bond in the amount of **NA** the total amount of the bid will be required upon execution of the Contract by the successful Bidder and Miami-Dade County.

<b>DO NOT WRITE IN THIS SPACE</b>	
ACCEPTED _____	HIGHER THAN LOW _____
NON-RESPONSIVE _____	NON-RESPONSIBLE _____
DATE B.C.C. _____	NO BID _____
ITEM NOS. ACCEPTED _____	
COMMODITY CODE: <b>962-95, 958-82, 962-69</b>	
Procurement Contracting Officer: <b>Constance Thame, CPPB</b>	

FIRM NAME \_\_\_\_\_

**RETURN ONE ORIGINAL AND TWO COPIES OF BID SUBMITTAL PAGES AND AFFIDAVITS.**

**FAILURE TO SIGN THE BID SUBMITTAL FORM IN SECTION 4 WILL RENDER YOUR BID NON-RESPONSIVE.**

**SECTION 4  
 BID SUBMITTAL FOR:  
 COMMERCIAL RECORDS MANAGEMENT SERVICES**

FIRM NAME: \_\_\_\_\_

**4.1 MINIMUM REQUIREMENTS:**

Reference Section	Summarized Requirements	Initial as completed
<b>Section 2.3.1.1</b>	<b>Client Reference #1</b>	_____
	Company Name:	
	Contact Name:	
	Contact Title:	
	Contract Address:	
	Contact Telephone Number:	
	Contact e-mail address:	
	<b>Client Reference #2</b>	_____
	Company Name:	
	Contact Name:	
	Contact Title:	
	Contract Address:	
	Contact Telephone Number:	
	Contact e-mail address:	
	<b>Client Reference #3</b>	_____
	Company Name:	
	Contact Name:	
	Contact Title:	
	Contract Address:	
	Contact Telephone Number:	
	Contact e-mail address:	
<b>Section 2.3.1.2</b>	<b>Primary Contract Information</b>	_____
	Primary Contact:	
	E-Mail Address:	
	Contact Telephone Number:	
	Cellular Phone Number (if applicable):	
	Company Main Telephone No.:	
<b>Section 2.3.1.3</b>	<b>Facility shall be located in Miami-Dade County</b>	_____
	Address of Facility:	

**SECTION 4  
BID SUBMITTAL FOR:  
COMMERCIAL RECORDS MANAGEMENT SERVICES**

**FIRM NAME:** \_\_\_\_\_

**Note:** All Bidders are requested to submit with their Bid submittal, documents as evidence of compliance with the minimum qualification requirements; however, Miami-Dade County may, at its sole discretion, allow the Bidder to complete or supplement the qualification required information/document during the Bid evaluation period.

**4.2 PRICES:**

Item	Five Year Est. Qty.	Description	Unit Price (Each)
<b>DELIVERY, RETRIEVAL AND NEW ADDITIONS (REFER TO SECTION 3.3.1)</b>			
1	13,825	Initial pick-up per box	\$
2	200	Initial pick-up per pallet	\$
3	6,500	Additional pick-up per box	\$
4	1,200	Additional pick-up per pallet	\$
5	8,500	Delivery of boxes	\$
6	14,380	Barcode sheet (16 barcode/sheet)	\$
7	17,400	Boxes for additional records to be stored	\$
8	16,480	Retrieval and re-file per box	\$
9	1,000	Emergency Delivery per box	\$
10	1,000	Emergency Delivery per pallet	\$
<b>MONTHLY WAREHOUSE STORAGE (REFER TO SECTION 3.3.2)</b>			
11	55,242	Regular warehouse storage per box	\$
12	7,800	Regular warehouse storage per pallet	\$
<b>DOCUMENT DESTRUCTION (REFER TO SECTION 3.3.3)</b>			
13	6,500	Permanent out retrieval per box	\$
14	4,000	Permanent out materials per box	\$
<b>RETENTION SERVICES (REFER TO SECTION 3.3.4)</b>			
15	503,000	Scanning retention services	\$
16	2	Digital Storage per user department	\$

SECTION 4  
BID SUBMITTAL FOR:

COMMERCIAL RECORDS MANAGEMENT SERVICES

ACKNOWLEDGEMENT OF ADDENDA

---

---

INSTRUCTIONS: COMPLETE PART I OR PART II, WHICHEVER APPLIES

---

---

**PART I:**

LIST BELOW THE DATES OF ISSUE FOR EACH ADDENDUM RECEIVED IN CONNECTION WITH THIS BID

Addendum #1, Dated \_\_\_\_\_

Addendum #2, Dated \_\_\_\_\_

Addendum #3, Dated \_\_\_\_\_

Addendum #4, Dated \_\_\_\_\_

Addendum #5, Dated \_\_\_\_\_

Addendum #6, Dated \_\_\_\_\_

Addendum #7, Dated \_\_\_\_\_

Addendum #8, Dated \_\_\_\_\_

---

---

**PART II:**

NO ADDENDUM WAS RECEIVED IN CONNECTION WITH THIS BID

---

---

FIRM NAME: \_\_\_\_\_

AUTHORIZED SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

TITLE OF OFFICER: \_\_\_\_\_

**Bid Title: COMMERCIAL RECORDS MANAGEMENT SERVICES**

By signing this Bid Submittal Form the Bidder certifies that it satisfies all legal requirements (as an entity) to do business with the County, including all Conflict of Interest and Code of Ethics provisions in Section 2-11 of the Miami-Dade County Code. Any County employee or member of his or her immediate family seeking to contract with the County shall seek a conflict of interest opinion from the Miami-Dade County Ethics Commission prior to submittal of a Bid response or application of any type to contract with the County by the employee or his or her immediate family and file a copy of that request for opinion and any opinion or waiver from the Board of County Commissioners with the Clerk of the Board. The affected employee shall file with the Clerk of the Board a statement in a form satisfactory to the Clerk disclosing the employee's interest or the interest of his or her immediate family in the proposed contract and the nature of the intended contract at the same time as or before submitting a Bid, response, or application of any type to contract with the County. Also a copy of the request for a conflict of interest opinion from the Ethics Commission and any corresponding opinion, or any waiver issued by the Board of County Commissioners, must be submitted with the response to the solicitation.

In accordance with Sec. 2-11.1(s) of the County Code as amended, prior to conducting any lobbying **regarding this solicitation, the Bidder must file the appropriate form with the Clerk of the Board stating that a particular lobbyist is authorized to represent the Bidder.** Failure to file the appropriate form in relation to each solicitation may be considered as evidence that the Bidder is not a responsible contractor.

The Bidder confirms that this Bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Bid for the same goods and/or services and in all respects is without collusion, and that the Bidder will accept any resultant award. Further, the undersigned acknowledges that award of a contract is contingent upon vendor registration. Failure to register as a vendor within the specified time may result in your firm not being considered for award.

Pursuant to Miami-Dade County Ordinance 94-34, any individual, corporation, partnership, joint venture or other legal entity having an officer, director, or executive who has been convicted of a felony during the past ten (10) years shall disclose this information at the time of bid or proposal submission.

Place a check mark here only if bidder has such conviction to disclose.

By executing this proposal through a duly authorized representative, the proposer certifies that the proposer is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, as those terms are used and defined in sections 287.135 and 215.473 of the Florida Statutes. In the event that the proposer is unable to provide such certification but still seeks to be considered for award of this solicitation, the proposer shall execute the proposal through a duly authorized representative and shall also initial this space: \_\_\_\_\_. In such event, the proposer shall furnish together with its proposal a duly executed written explanation of the facts supporting any exception to the requirement for certification that it claims under Section 287.135 of the Florida Statutes. The proposer agrees to cooperate fully with the County in any investigation undertaken by the County to determine whether the claimed exception would be applicable. The County shall have the right to terminate any contract resulting from this solicitation for default if the proposer is found to have submitted a false certification or to have been placed on the Scrutinized Companies for Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

**LOCAL PREFERENCE CERTIFICATION:** For the purpose of this certification, a "local business" is a business located within the limits of Miami-Dade County (or Broward County in accordance with the Interlocal Agreement between the two counties) that conforms with the provisions of Section 1.10 of the General Terms and Conditions of this solicitation and contributes to the economic development of the community 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 to the County's tax base.

Place a check mark here only if affirming bidder meets requirements for Local Preference. Failure to complete this certification at this time (by checking the box above) may render the vendor ineligible for Local Preference.

**LOCALLY-HEADQUARTERED BUSINESS CERTIFICATION:** For the purpose of this certification, a "locally-headquartered business" is a Local Business whose "principal place of business" is in Miami-Dade County, as defined in Section 1.10 of the General Terms and Conditions of this solicitation.

Place a check mark here only if affirming bidder meets requirements for the Locally-Headquartered Preference (LHP). Failure to complete this certification at this time (by checking the box above) may render the vendor ineligible for the LHP. The address of the locally-headquartered office is \_\_\_\_\_.



LOCAL CERTIFIED SERVICE-DISABLED VETERAN BUSINESS ENTERPRISE CERTIFICATION: A Local Certified Service-Disabled Veteran Business Enterprise is a firm that is (a) a local business pursuant to Section 2-8.5 of the Code of Miami-Dade County and (b) prior to bid submission is certified by the State of Florida Department of Management Services as a service-disabled veteran business enterprise pursuant to Section 295.187 of the Florida Statutes.

Place a check mark here only if affirming bidder is a Local Certified Service-Disabled Veteran Business Enterprise. A copy of the certification must be submitted with this proposal.

COUNTY USER ACCESS PROGRAM (UAP): Joint purchase and entity revenue sharing program

For the County's information, the bidder is requested to indicate, at 'A' and 'B' below, its general interest in participating in the Joint Purchase Program of the County User Access Program (UAP) described in Section 1.35 of this contract solicitation, if that section is present in this solicitation document. Bidder participation in the Joint Purchase portion of the UAP is voluntary, and the bidder's expression of general interest at 'A' and 'B' below is for the County's information only and shall not be binding on the bidder.

A. If awarded this County contract, would you be interest in participating in the Joint Purchase portion of the UAP with respect to other governmental, quasi-governmental or not-for-profit entities located within the geographical boundaries of Miami-Dade County?

Yes \_\_\_\_\_ No \_\_\_\_\_

B. If awarded this County contract, would you be interested in participating in the Joint Purchase portion of the UAP with respect to other governmental, quasi-governmental or not-for-profit entities located outside the geographical boundaries of Miami-Dade County?

Yes \_\_\_\_\_ No \_\_\_\_\_

Firm Name: \_\_\_\_\_

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

Mailing Address (if different): \_\_\_\_\_

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_

Email Address: \_\_\_\_\_ FEIN No. \_/ - / / / / / /

Prompt Payment Terms: \_\_\_\_% \_\_\_\_ days net \_\_\_\_ days (Please see paragraph 1.2 H of General Terms and Conditions)

Signature: \_\_\_\_\_ (Signature of authorized agent)
\*\*By signing this document the bidder agrees to all Terms and Conditions of this Solicitation and the resulting Contract.\*\*

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF PROPOSER TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED ABOVE BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE PROPOSAL NON-RESPONSIVE. THE COUNTY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE PROPOSER TO THE TERMS OF ITS OFFER.



# **APPENDIX**

## **AFFIDAVITS** **FORMAL BIDS**



*Miami-Dade County*  
*Internal Services Department*  
*Procurement Management Division*  
**Affirmation of Vendor Affidavits**

In accordance with Ordinance 07-143 amending Section 2-8.1 of the Code of Miami-Dade County, effective June 1, 2008, vendors are required to complete a new Vendor Registration Package, including a Uniform Affidavit Packet (Vendor Affidavits).



**BID NO.: DRAFT 10/ /13**

**OPENING: 5:00 P.M.**

**, 2014**

**MIAMI-DADE COUNTY, FLORIDA**

**I N V I T A T I O N  
T O B I D**

**TITLE:**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**FOR INFORMATION CONTACT:**

**Constance Thame, 305-375-1078, [cthame@miamidade.gov](mailto:cthame@miamidade.gov)**

**IMPORTANT NOTICE TO BIDDERS:**

- **READ THIS ENTIRE DOCUMENT, THE GENERAL TERMS AND CONDITIONS, AND HANDLE ALL QUESTIONS IN ACCORDANCE WITH THE TERMS OUTLINED IN PARAGRAPH 1.2(D) OF THE GENERAL TERMS AND CONDITIONS.**
- **FAILURE TO SIGN BID SUBMITTAL FORM IN SECTION 4 WILL RENDER YOUR BID NON-RESPONSIVE**

**MIAMI-DADE COUNTY  
INTERNAL SERVICES DEPARTMENT  
PROCUREMENT MANAGEMENT SERVICES DIVISION**



MIAMI-DADE COUNTY, FLORIDA

INVITATION TO BID

Bid Number:

Bid Title: COMMERCIAL RECORDS MANAGEMENT SERVICES

Procurement Officer: Constance Thame, CPPB

Bids will be accepted until 5:00 p.m. on \_\_\_\_\_, 2014

**Bids will be publicly opened.** The County provides equal access and does not discriminate on the basis of disability in its programs or services. It is our policy to make all communication available to the public, including those who may be visually or hearing impaired. If you require information in a non-traditional format please call 305-375-5278.

**Instructions:** The Clerk of the Board business hours are 8:00 a.m. to 4:30 p.m., Monday through Friday. Additionally, the Clerk of the Board is closed on holidays observed by the County. Each Bid submitted to the Clerk of the Board shall have the following information clearly marked on the face of the envelope: Bidder's name, return address, Bid number, opening date of the Bid, and the title of the Bid. Included in the envelope shall be an original and two (2) copies of the Bid Submittal, plus attachments, if applicable.

All Bids received time and date stamped by the Clerk of the Board prior to the Bid submittal deadline shall be accepted as timely submitted. The circumstances surrounding all Bids received and time stamped by the Clerk of the Board after the Bid submittal deadline will be evaluated by the procuring department, in consultation with the County Attorney's Office, to determine whether the Bid will be accepted as timely.

**NOTICE TO ALL BIDDERS:**

- **FAILURE TO SIGN THE BID SUBMITTAL FORM WILL RENDER YOUR BID NON-RESPONSIVE.**
- **THE BID SUBMITTAL FORM CONTAINS IMPORTANT CERTIFICATIONS THAT REQUIRE REVIEW AND COMPLETION BY ANY BIDDER RESPONDING TO THIS SOLICITATION.**

MIAMI-DADE COUNTY  
INTERNAL SERVICES DEPARTMENT  
PROCUREMENT MANAGEMENT SERVICES DIVISION

SECTION 1  
GENERAL TERMS AND CONDITIONS

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

All general terms and conditions of Miami-Dade County procurement contracts for Invitations to Bid are posted online. Persons and companies that receive an award from Miami-Dade County 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 Services Division website by clicking on the link below:

<http://www.miamidade.gov/procurement/library/boilerplate/general-terms-and-conditions-r13-8.pdf>

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**2.1 PURPOSE**

The purpose of this Solicitation is to establish a Contract for commercial records management services including storage, retrieval, delivery of file folders/boxes archive boxes, vault storage, permanent out materials, and imaging/scanning, in conjunction with various Miami-Dade County departments, on an "as-needed" basis.

**2.2 TERM OF CONTRACT: FIVE (5) YEARS**

This Contract shall commence on the first calendar day of the month succeeding approval of the Contract by the Board of County Commissioners, or designee, unless otherwise stipulated in the Notice of Award Letter, which is distributed by the County's Procurement Management Services Division, and contingent upon the completion and submittal of all required Bid documents. The Contract shall expire on the last day of the sixtieth (60<sup>th</sup>) month of the Contract Term.

**2.3 METHOD OF AWARD: TWO (2) LOWEST PRICED BIDDERS IN THE AGGREGATE**

Award of this Contract will be made to up to two (2) responsive and responsible Bidders who submit an offer on all items listed in the Solicitation and whose offer represents the lowest price when all services and items are added in the aggregate. The lowest-priced responsive and responsible Bidder in the aggregate shall be designated as the Primary Awarded Bidder and the second-lowest priced responsive and responsible Bidder in the aggregate shall be designated as the Secondary Awarded Bidder. While the County will award to multiple Bidders to assure availability, for the County's convenience, the Primary Bidder shall have the primary responsibility to deliver under the Contract. This multiple award does not exempt awarded Bidders from fulfilling their contractual obligations. An Awarded Bidder, Primary or Secondary, that fails to perform in accordance with Contract requirements may be terminated in accordance with Sections 1.24 and/or 1.25 of the General Terms and Conditions and/or charged re-procurement costs.

**2.3.1 Minimum Qualifications:**

To be considered for award, Bidder(s) must meet the following requirements:

**2.3.1.1** Be regularly engaged in the business of providing commercial records management services as required in this Solicitation. As proof, Bidder(s) will provide three (3) references (see Section 4) to whom the Bidder has provided services as those described in this Solicitation for a period of at least two (2) years. The references must include the customer's name, contact person's name, title address and telephone number and the person's name that is able to verify that the Bidder has successfully provided the offered services. These references shall ascertain to the County's satisfaction that the Awarded Bidder(s) has sufficient experience and expertise in the commercial records management services.

**2.3.1.2** Provide the firm's primary contact name, e-mail address, telephone number, fax number, cellular phone number and company main phone number.

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

- 2.3.1.3 Have storage facilities located in Miami-Dade County, Florida, that can provide the record management services.

**2.4 PRICES**

The prices proposed by the Awarded Bidder(s) shall remain fixed for a period of one (1) year after the commencement of the Contract. After this period, the Awarded Bidder(s) may submit a price adjustment request annually to the County based on the most recent annual index of the following: **Consumer Price Index (CPI), All Urban Consumers, All Items, Miami/Ft. Lauderdale Area.**

It is the Awarded Bidder's responsibility to request any price adjustment under this provision. For any adjustment to be considered, it must be submitted ninety (90) days prior to expiration of the then one (1) year period. If no price adjustment request is received from the Awarded Bidder(s), the County will assume that the Awarded Bidder(s) has agreed to continue the Contract at the then current rate.

The County reserves the right to negotiate lower pricing for any subsequent one year (1) period based on market research information or other factors that influence price. The County reserves the right to apply any reduction in pricing for the one (1) year period based on the downward movement of the applicable index.

The County reserves the right to reject any price adjustments submitted by the Awarded Bidder(s).

**2.5 INDEMNIFICATION AND INSURANCE – GENERAL SERVICE AND MAINTENANCE**

Contractor shall indemnify and hold harmless the County and its officers, employees, agents and instrumentalities from any and all liability, losses or damages, including attorneys' fees and costs of defense, which the County or its officers, employees, agents or instrumentalities may incur as a result of claims, demands, suits, causes of actions or proceedings of any kind or nature arising out of, relating to or resulting from the performance of this Agreement by the Contractor or its employees, agents, servants, partners principals or subcontractors. Contractor shall pay all claims and losses in connection therewith and shall investigate and defend all claims, suits or actions of any kind or nature in the name of the County, where applicable, including appellate proceedings, and shall pay all costs, judgments, and attorney's fees which may issue thereon. Contractor expressly understands and agrees that any insurance protection required by this Agreement or otherwise provided by Contractor shall in no way limit the responsibility to indemnify, keep and save harmless and defend the County or its officers, employees, agents and instrumentalities as herein provided.

The Awarded Bidder(s) shall furnish to Vendor Assistance Section, Procurement Management Services, 111 NW 1<sup>st</sup> Street, Suite 1300, Miami, Florida 33128, Certificate(s) of Insurance which indicate that insurance coverage has been obtained which meets the requirements as outlined below:

- A. Worker's Compensation Insurance for all employees of the Contractor as required by Florida Statute 440.

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

- B. Commercial General Liability Insurance on a comprehensive basis, in an amount not less than \$1,000,000 combined single limit per occurrence for bodily injury and property damage. **Miami-Dade County must be shown as an additional insured with respect to this coverage.**
- C. Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the work, in an amount not less than \$500,000 combined single limit per occurrence for bodily injury and property damage.

All insurance policies required above shall be issued by companies authorized to do business under the laws of the State of Florida, with the following qualifications:

The company must be rated no less than "B" as to management, and no less than "Class V" as to financial strength by Best's Insurance Guide, published by A.M. Best Company, Oldwick, New Jersey, or its equivalent, subject to the approval of the County Risk Management Division.

or

The company must hold a valid Florida Certificate of Authority as shown in the latest "List of All Insurance Companies Authorized or Approved to Do Business in Florida" issued by the State of Florida Office of Insurance Regulation.

Certificates will indicate no modification or change in insurance shall be made without thirty (30) days in advance notice to the certificate holder.

**CERTIFICATE HOLDER MUST READ:      MIAMI-DADE COUNTY**  
**111 NW 1<sup>ST</sup> STREET**  
**SUITE 2340**  
**MIAMI, FL 33128**

**2.6      METHOD OF PAYMENT: MONTHLY INVOICES**

The Awarded Bidder(s) shall submit monthly invoices by the tenth (10th) calendar day of each month. These invoices shall be submitted to the County user department(s) that requested the service through a purchase order. The invoices shall reflect the type of service provided to the County in the prior month.

All invoices shall contain the following basic information:

- I. Awarded Bidder(s) Information:
  - The name of the business organization as specified on the Contract between Miami-Dade County and Awarded Bidder(s)
  - Date of invoice
  - Invoice number
  - Awarded Bidder's Federal Identification Number on file with Miami-Dade

**SECTION 2**  
**SPECIAL CONDITIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

County

II. County Information:

- Miami-Dade County Release Purchase Order or Small Purchase Order Number

III. Pricing Information:

- Unit price of the goods, services provided
- Extended total price of the goods or services
- Applicable discounts

IV. Goods or Services Provided per Contract:

- Description
- Quantity

**2.7 CONTACT PERSONS**

For any additional information regarding the terms and conditions of this Solicitation and resultant Contract, please contact Constance Thame at (305) 375-1078 or [cthame@miamidade.gov](mailto:cthame@miamidade.gov).

**2.8 SERVICES MAY BE ADDED OR DELETED**

It is hereby agreed and understood that additional goods/services may be added to this Contract at the County's option. It is also agreed and understood that the County may add or delete goods/services on this Contract at the County's option. Awarded Bidder(s) under this Contract shall be invited to submit price quotes for these additional goods/services. If these quotes are determined to be fair and reasonable, then the additional goods/services will be awarded to the current contracted Bidder(s) that offers the lowest acceptable pricing.

**SECTION 3**  
**TECHNICAL SPECIFICATIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**3.1 BACKGROUND**

The purpose of this Solicitation is to establish a Contract for commercial records management services including storage, retrieval, delivery of file folders/boxes archive boxes, vault storage, permanent out materials, and imaging/scanning, in conjunction with various Miami-Dade County departments, on an "as-needed" basis. Awarded Bidder(s) must also have designated staff, working telephones, separate facsimile lines and/or email addresses to expedite quotes.

**3.2 STORAGE FACILITY REQUIREMENTS**

Awarded Bidder(s) storage facility shall:

- a. Have floor space to accommodate a minimum of five hundred (500) cardboard boxes (boxes are approximately 12 ½" wide 16" long x 10" high) at any given time. The County reserves the right to change or alter the size and type of boxes.
- b. Be an individual structure separated from other buildings and external hazards to ensure a high degree of safety from fire, flood, and other potential hazards.
- c. Be located above the local flood plain and be constructed of concrete, masonry, or steel that meets all National Fire Prevention Standards (NFPS). All firewalls must be structurally sound and capable of withstanding impact and imposed loads if severe fire exposure would cause collapse of the framing on one wall. All openings in the firewalls must be protected on each side by fire doors suitable for immediate openings. All walls separating records storage areas from each other and from other portions of the facility shall consist of four (4) fire resistant walls.
- d. Maintain a controlled environment for humidity. For security of the County files, the facility must be secured and provide protection against unauthorized intrusion and access to the County's stored records.
- e. Have a fire sprinkler system that meets all national, County and Local Fire Code Standards, with smoke detectors and heat sensors, except for vault storage area, which must use inert gas suppression.
- f. Have no windows in any stack areas.
- g. Have shelving that must be of fire retardant, chemically neutral, steel construction. Bottom shelves shall be at least two and one fifth (2-1/5") inches from the floor.
- h. Be clean, well organized, and free of rodent and pest infestation.
- i. Possess a twenty-four (24) hour interior and exterior security system electronically linked to local police and fire departments.
- j. Be insured against damages or loss to stored property. Refer to Section 2.5 of this Solicitation.
- k. Provide for goods to be stored adequately, ventilated, and must have heat and smoke detectors in areas where County files are stored.

**SECTION 3**  
**TECHNICAL SPECIFICATIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**3.3 SERVICES TO BE PROVIDED**

Awarded Bidder(s) shall:

- a. Create/possess and utilize an in-house records indexing/cataloging system for expedited retrieval. Awarded Bidder(s) shall be required to work with the County in developing an inventory acceptable to the County and which will best service the County's needs.
- b. Have capability to dispose/destroy records and provide certification records of destruction requests to the County.
- c. Have an online base ordering system that allows the County to place orders electronically.
- d. Have the capability and ability to receive purchase orders/releases via e-mail or fax and provide goods/services as requested in the purchase order/release.
- e. Charge and invoice Miami-Dade County by box, item requested, and not by cubic feet.
- f. Comply with the following regulations:
  1. Florida Administrative code rules 1B24 and 1B26 for Public Records Scheduling and Deposition to include Electronic Recordkeeping  
<http://info.florida.gov/barm/rules/1B24FAC.cfm>  
[www.flclerks.com/Pub\\_info/2003\\_pdf/1B26\\_003FAC.pdf](http://www.flclerks.com/Pub_info/2003_pdf/1B26_003FAC.pdf)
  2. Florida Statute 119 - Public Records  
<http://www.flsenate.gov/Laws/Statutes/2010/Chapter119>
- g. Comply with a 30-60 day transition period, as the material kept in storage may need to be transferred from the incumbent facility to the Awarded Bidder's location. The transition period will minimize service interruptions to the County user departments.

**3.3.1 PICK-UP, DELIVERY, RETRIEVAL AND NEW ADDITIONS**

Awarded Bidder(s) shall:

- a. Provide initial pick-up per box/pallet from designated sites County owned and/or operated.
- b. Provide additional pick-up per box/pallet from designated sites County owned and/or operated.
- c. Provide deliveries per box to designated sites County owned and/or operated.
- d. Provide barcode sheet (16 barcode per sheet) record management.
- e. Provide boxes for additional records to be stored.
- f. Provide retrieval and refiling per box/pallet.

**SECTION 3**  
**TECHNICAL SPECIFICATIONS**

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

g. Provide emergency delivery per box/pallet.

**3.3.2 MONTHLY WAREHOUSE STORAGE**

The awarded Bidder(s) shall provide monthly warehouse storage per box/pallet.

**3.3.3 DOCUMENT DESTRUCTION**

The awarded Bidder(s) shall provide document destruction consisting of permanent out retrieval and materials.

**3.3.4 RETENTION SERVICES**

The awarded Bidder(s) shall:

- a. Provide scanning retention services.
- b. Provide digital storage per user department at Miami-Dade County's request.

**SECTION 4  
BID SUBMITTAL FORM**

**Submit Bid To:**  
**CLERK OF THE BOARD**  
**Stephen P. Clark Center**  
**111 NW 1<sup>st</sup> Street**  
**17<sup>th</sup> Floor, Suite 202**  
**Miami, Florida 33128-1983**

**OPENING: 2:00 P.M.**  
**, 2014**



**PLEASE QUOTE PRICES F.O.B. DESTINATION, FREIGHT ALLOWED, LESS TAXES,  
DELIVERED IN MIAMI-DADE COUNTY, FLORIDA.**

NOTE: Miami-Dade County is exempt from all taxes (Federal, State, Local). Bid price should be less all taxes. Tax Exemption Certificate furnished upon request.

Issued by: ct                      ISD/PM                      Date Issued:                      This Bid Submittal Consists of Pages 8 thru 13 + Affidavits

Sealed bids subject to the Terms and Conditions of this Invitation to Bid and the accompanying Bid Submittal. Such other Contract provisions, specifications, drawings or other data as are attached or incorporated by reference in the Bid Submittal, will be received at the office of the Clerk of the Board at the address shown above until the above stated time and date, and at that time, publicly opened for furnishing the supplies or services described in the accompanying Bid Submittal Requirement.

**COMMERCIAL RECORDS MANAGEMENT SERVICES**

A Bid Deposit in the amount of **NA** the total amount of the bid shall accompany all bids.

A Performance Bond in the amount of **NA** the total amount of the bid will be required upon execution of the Contract by the successful Bidder and Miami-Dade County.

<b>DO NOT WRITE IN THIS SPACE</b>	
ACCEPTED _____	HIGHER THAN LOW _____
NON-RESPONSIVE _____	NON-RESPONSIBLE _____
DATE B.C.C. _____	NO BID _____
ITEM NOS. ACCEPTED _____	
COMMODITY CODE: <b>962-95, 958-82, 962-69</b>	
Procurement Contracting Officer: <b>Constance Thame, CPPB</b>	

FIRM NAME \_\_\_\_\_

**RETURN ONE ORIGINAL AND TWO COPIES OF BID SUBMITTAL PAGES AND AFFIDAVITS.**

**FAILURE TO SIGN THE BID SUBMITTAL FORM IN SECTION 4 WILL RENDER YOUR BID NON-RESPONSIVE.**

**SECTION 4  
BID SUBMITTAL FOR:  
COMMERCIAL RECORDS MANAGEMENT SERVICES**

FIRM NAME: \_\_\_\_\_

**4.1 MINIMUM REQUIREMENTS:**

Reference Section	Summarized Requirements	Initial as completed
<b>Section 2.3.1.1</b>	<b>Client Reference #1</b>	_____
	Company Name:	
	Contact Name:	
	Contact Title:	
	Contract Address:	
	Contact Telephone Number:	
	Contact e-mail address:	
	<b>Client Reference #2</b>	_____
	Company Name:	
	Contact Name:	
	Contact Title:	
	Contract Address:	
	Contact Telephone Number:	
	Contact e-mail address:	
	<b>Client Reference #3</b>	_____
	Company Name:	
	Contact Name:	
	Contact Title:	
	Contract Address:	
	Contact Telephone Number:	
	Contact e-mail address:	
<b>Section 2.3.1.2</b>	<b>Primary Contract Information</b>	_____
	Primary Contact:	
	E-Mail Address:	
	Contact Telephone Number:	
	Cellular Phone Number (if applicable):	
	Company Main Telephone No.:	
<b>Section 2.3.1.3</b>	<b>Facility shall be located in Miami-Dade County</b>	_____
	Address of Facility:	

**SECTION 4**  
**BID SUBMITTAL FOR:**  
**COMMERCIAL RECORDS MANAGEMENT SERVICES**

**FIRM NAME:** \_\_\_\_\_

**Note:** All Bidders are requested to submit with their Bid submittal, documents as evidence of compliance with the minimum qualification requirements; however, Miami-Dade County may, at its sole discretion, allow the Bidder to complete or supplement the qualification required information/document during the Bid evaluation period.

**4.2 PRICES:**

Item	Five Year Est. Qty.	Description	Unit Price (Each)
<b>DELIVERY, RETRIEVAL AND NEW ADDITIONS (REFER TO SECTION 3.3.1)</b>			
1	13,825	Initial pick-up per box	\$
2	200	Initial pick-up per pallet	\$
3	6,500	Additional pick-up per box	\$
4	1,200	Additional pick-up per pallet	\$
5	8,500	Delivery of boxes	\$
6	14,380	Barcode sheet (16 barcode/sheet)	\$
7	17,400	Boxes for additional records to be stored	\$
8	16,480	Retrieval and re-file per box	\$
9	1,000	Emergency Delivery per box	\$
10	1,000	Emergency Delivery per pallet	\$
<b>MONTHLY WAREHOUSE STORAGE (REFER TO SECTION 3.3.2)</b>			
11	55,242	Regular warehouse storage per box	\$
12	7,800	Regular warehouse storage per pallet	\$
<b>DOCUMENT DESTRUCTION (REFER TO SECTION 3.3.3)</b>			
13	6,500	Permanent out retrieval per box	\$
14	4,000	Permanent out materials per box	\$
<b>RETENTION SERVICES (REFER TO SECTION 3.3.4)</b>			
15	503,000	Scanning retention services	\$
16	2	Digital Storage per user department	\$

SECTION 4  
BID SUBMITTAL FOR:

COMMERCIAL RECORDS MANAGEMENT SERVICES

ACKNOWLEDGEMENT OF ADDENDA

---

---

INSTRUCTIONS: COMPLETE PART I OR PART II, WHICHEVER APPLIES

---

---

**PART I:**

LIST BELOW THE DATES OF ISSUE FOR EACH ADDENDUM RECEIVED IN CONNECTION WITH THIS BID

Addendum #1, Dated \_\_\_\_\_

Addendum #2, Dated \_\_\_\_\_

Addendum #3, Dated \_\_\_\_\_

Addendum #4, Dated \_\_\_\_\_

Addendum #5, Dated \_\_\_\_\_

Addendum #6, Dated \_\_\_\_\_

Addendum #7, Dated \_\_\_\_\_

Addendum #8, Dated \_\_\_\_\_

---

---

**PART II:**

NO ADDENDUM WAS RECEIVED IN CONNECTION WITH THIS BID

---

---

FIRM NAME: \_\_\_\_\_

AUTHORIZED SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

TITLE OF OFFICER: \_\_\_\_\_



**Bid Title: COMMERCIAL RECORDS MANAGEMENT SERVICES**

By signing this Bid Submittal Form the Bidder certifies that it satisfies all legal requirements (as an entity) to do business with the County, including all Conflict of Interest and Code of Ethics provisions in Section 2-11 of the Miami-Dade County Code. Any County employee or member of his or her immediate family seeking to contract with the County shall seek a conflict of interest opinion from the Miami-Dade County Ethics Commission prior to submittal of a Bid response or application of any type to contract with the County by the employee or his or her immediate family and file a copy of that request for opinion and any opinion or waiver from the Board of County Commissioners with the Clerk of the Board. The affected employee shall file with the Clerk of the Board a statement in a form satisfactory to the Clerk disclosing the employee's interest or the interest of his or her immediate family in the proposed contract and the nature of the intended contract at the same time as or before submitting a Bid, response, or application of any type to contract with the County. Also a copy of the request for a conflict of interest opinion from the Ethics Commission and any corresponding opinion, or any waiver issued by the Board of County Commissioners, must be submitted with the response to the solicitation.

In accordance with Sec. 2-11.1(s) of the County Code as amended, prior to conducting any lobbying **regarding this solicitation, the Bidder must file the appropriate form with the Clerk of the Board stating that a particular lobbyist is authorized to represent the Bidder.** Failure to file the appropriate form in relation to each solicitation may be considered as evidence that the Bidder is not a responsible contractor.

The Bidder confirms that this Bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Bid for the same goods and/or services and in all respects is without collusion, and that the Bidder will accept any resultant award. Further, the undersigned acknowledges that award of a contract is contingent upon vendor registration. Failure to register as a vendor within the specified time may result in your firm not being considered for award.

Pursuant to Miami-Dade County Ordinance 94-34, any individual, corporation, partnership, joint venture or other legal entity having an officer, director, or executive who has been convicted of a felony during the past ten (10) years shall disclose this information at the time of bid or proposal submission.

Place a check mark here only if bidder has such conviction to disclose.

By executing this proposal through a duly authorized representative, the proposer certifies that the proposer is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, as those terms are used and defined in sections 287.135 and 215.473 of the Florida Statutes. In the event that the proposer is unable to provide such certification but still seeks to be considered for award of this solicitation, the proposer shall execute the proposal through a duly authorized representative and shall also initial this space: \_\_\_\_\_. In such event, the proposer shall furnish together with its proposal a duly executed written explanation of the facts supporting any exception to the requirement for certification that it claims under Section 287.135 of the Florida Statutes. The proposer agrees to cooperate fully with the County in any investigation undertaken by the County to determine whether the claimed exception would be applicable. The County shall have the right to terminate any contract resulting from this solicitation for default if the proposer is found to have submitted a false certification or to have been placed on the Scrutinized Companies for Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

**LOCAL PREFERENCE CERTIFICATION:** For the purpose of this certification, a "local business" is a business located within the limits of Miami-Dade County (or Broward County in accordance with the Interlocal Agreement between the two counties) that conforms with the provisions of Section 1.10 of the General Terms and Conditions of this solicitation and contributes to the economic development of the community 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 to the County's tax base.

Place a check mark here only if affirming bidder meets requirements for Local Preference. Failure to complete this certification at this time (by checking the box above) may render the vendor ineligible for Local Preference.

**LOCALLY-HEADQUARTERED BUSINESS CERTIFICATION:** For the purpose of this certification, a "locally-headquartered business" is a Local Business whose "principal place of business" is in Miami-Dade County, as defined in Section 1.10 of the General Terms and Conditions of this solicitation.

Place a check mark here only if affirming bidder meets requirements for the Locally-Headquartered Preference (LHP). Failure to complete this certification at this time (by checking the box above) may render the vendor ineligible for the LHP. The address of the locally-headquartered office is \_\_\_\_\_.



LOCAL CERTIFIED SERVICE-DISABLED VETERAN BUSINESS ENTERPRISE CERTIFICATION: A Local Certified Service-Disabled Veteran Business Enterprise is a firm that is (a) a local business pursuant to Section 2-8.5 of the Code of Miami-Dade County and (b) prior to bid submission is certified by the State of Florida Department of Management Services as a service-disabled veteran business enterprise pursuant to Section 295.187 of the Florida Statutes.

Place a check mark here only if affirming bidder is a Local Certified Service-Disabled Veteran Business Enterprise. A copy of the certification must be submitted with this proposal.

COUNTY USER ACCESS PROGRAM (UAP): Joint purchase and entity revenue sharing program

For the County's information, the bidder is requested to indicate, at 'A' and 'B' below, its general interest in participating in the Joint Purchase Program of the County User Access Program (UAP) described in Section 1.35 of this contract solicitation, if that section is present in this solicitation document. Bidder participation in the Joint Purchase portion of the UAP is voluntary, and the bidder's expression of general interest at 'A' and 'B' below is for the County's information only and shall not be binding on the bidder.

A. If awarded this County contract, would you be interest in participating in the Joint Purchase portion of the UAP with respect to other governmental, quasi-governmental or not-for-profit entities located within the geographical boundaries of Miami-Dade County?

Yes \_\_\_\_\_ No \_\_\_\_\_

B. If awarded this County contract, would you be interested in participating in the Joint Purchase portion of the UAP with respect to other governmental, quasi-governmental or not-for-profit entities located outside the geographical boundaries of Miami-Dade County?

Yes \_\_\_\_\_ No \_\_\_\_\_

Firm Name: \_\_\_\_\_

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

Mailing Address (if different): \_\_\_\_\_

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_

Email Address: \_\_\_\_\_ FEIN No. \_/\_-\_/\_/\_/\_/\_/

Prompt Payment Terms: \_\_\_\_% \_\_\_\_ days net \_\_\_\_ days (Please see paragraph 1.2 H of General Terms and Conditions)

Signature: \_\_\_\_\_ (Signature of authorized agent)

\*\*By signing this document the bidder agrees to all Terms and Conditions of this Solicitation and the resulting Contract.\*\*

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF PROPOSER TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED ABOVE BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE PROPOSAL NON-RESPONSIVE. THE COUNTY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE PROPOSER TO THE TERMS OF ITS OFFER.



# **APPENDIX**

## **AFFIDAVITS FORMAL BIDS**





**SUBCONTRACTOR/SUPPLIER LISTING**  
**(Miami-Dade County Code Sections 2-8.1, 2-8.8 and 10-34)**

Name of Proposer: \_\_\_\_\_ FEIN No. \_\_\_\_\_

In accordance with Sections 2-8.1, 2-8.8 and 10.34 of the Miami-Dade County Code, this form must be submitted as a condition of award by all Proposers on County contracts for purchase of supplies, materials or services, including professional services which involve expenditures of \$100,000 or more, and all Proposers on County or Public Health Trust construction contracts which involve expenditures of \$100,000 or more. The Proposers who is awarded this contract shall not change or substitute first tier subcontractors or direct suppliers or the portions of the contract work to be performed or materials to be supplied from those identified, except upon written approval of the County. The Proposers should enter the word "NONE" under the appropriate heading of this form if no subcontractors or suppliers will be used on the contract and sign the form below.

In accordance with Ordinance No. 11-90, an entity contracting with the County shall report the race, gender and ethnic origin of the owners and employees of all first tier subcontractors/suppliers. In the event that the recommended Proposer demonstrates to the County prior to award that the race, gender, and ethnic information is not reasonably available at that time, the Proposer shall be obligated to exercise diligent efforts to obtain that information and provide the same to the County not later than ten (10) days after it becomes available and, in any event, prior to final payment under the contract.

(Please duplicate this form if additional space is needed.)

Business Name and Address of First Tier Subcontractor/ Subconsultant	Principal Owner	Scope of Work to be Performed by Subcontractor/ Subconsultant	Principal Owner (Enter the number of male and female owners by race/ethnicity)							Employee(s) (Enter the number of male and female employees and the number of employees by race/ethnicity)							
			Gender		Race/Ethnicity					Gender		Race/Ethnicity					
			M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/ Native Alaskan	Other	M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/ Native Alaskan
Business Name and Address of First Tier Direct Supplier	Principal Owner	Supplies/Materials/Services to be Provided by Supplier	Principal Owner (Enter the number of male and female owners by race/ethnicity)							Employee(s) (Enter the number of male and female employees and the number of employees by race/ethnicity)							
			Gender		Race/Ethnicity					Gender		Race/Ethnicity					
			M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/ Native Alaskan	Other	M	F	White	Black	Hispanic	Asian/Pacific Islander	Native American/ Native Alaskan

Mark here if race, gender and ethnicity information is not available and will be provided at a later date. This data may be submitted to contracting department or on-line to the Small Business Development of the Department of Regulatory and Economic Resources at <http://www.miamidade.gov/business/business-development-contracts.asp>. As a condition of final payment, Proposer shall provide subcontractor information on the Subcontractor Payment Report Sub 200 form which can be found at <http://www.miamidade.gov/business/library/forms/subcontractors-payment.pdf>.

certify that the representations contained in this Subcontractor/Supplier listing are to the best of my knowledge true and accurate.

Signature of Proposer \_\_\_\_\_ Print Name \_\_\_\_\_ Print Title \_\_\_\_\_ Date \_\_\_\_\_