

ISSUING DEPARTMENT INPUT DOCUMENT
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

New
 OTR
 Sole Source
 Bid Waiver
 Emergency
 Previous Contract/Project No. N/A
 Re-Bid
 Other – Access of Other Entity Contract
 LIVING WAGE APPLIES: YES NO
 Requisition No./Project No.: RFP-01172
 TERM OF CONTRACT 5 YEAR(S) WITH 2 YEAR(S) OTR

Requisition /Project Title: CLOUD-HOSTED SOLUTION FOR MAINFRAME ONLINE REPORTS

Description: Miami-Dade County, hereinafter referred to as the County, as represented by the Miami-Dade County Information Technology Department, is soliciting proposals to obtain a cloud-hosted solution for mainframe reports (Solution) to replace the IBM Content Manager OnDemand

Issuing Department: ITD
 Contact Person: Mirta Cardoso
 Phone: 305-596-8690
 Estimate Cost: \$2,000,000
 Funding Source: General
 GENERAL
 FEDERAL
 OTHER

ANALYSIS

Commodity Codes: 920-05
 Contract/Project History of previous purchases three (3) years
 Check here if this is a new contract/purchase with no previous history.

	<u>EXISTING</u>	<u>2ND YEAR</u>	<u>3RD YEAR</u>
Contractor:			
Small Business Enterprise:			
Contract Value:			

Comments: _____

Continued on another page (s): YES NO

RECOMMENDATIONS

	Set-Aside	Subcontractor Goal	Bid Preference	Selection Factor
SBE				

Basis of Recommendation: _____

Signed: Caroline Burgos
 Date sent to SBD: 7/8/2019
 Date returned to SPD: _____



**REQUEST FOR PROPOSALS (RFP) No. RFP-01172
FOR
CLOUD-HOSTED SOLUTION FOR MAINFRAME ONLINE REPORTS**

PRE-PROPOSAL CONFERENCE TO BE HELD:

_____, 2018 at __:00 AM (local time)
111 NW 1st Street, ___ Floor, Conf. Rm. __, Miami, Florida

ISSUED BY MIAMI-DADE COUNTY:

Internal Services Department, Strategic Procurement Division
for
Information Technology Department

MIAMI-COUNTY CONTACT FOR THIS SOLICITATION:

111 NW 1st Street, Suite 1300, Miami, Florida 33128
Telephone:
E-mail:

PROPOSALS DUE:

INSERT DATE AND TIME

**IT IS THE POLICY OF MIAMI-DADE COUNTY (COUNTY) THAT ALL ELECTED AND APPOINTED COUNTY OFFICIALS AND COUNTY EMPLOYEES SHALL ADHERE TO THE PUBLIC SERVICE HONOR CODE (HONOR CODE). THE HONOR CODE CONSISTS OF MINIMUM STANDARDS REGARDING THE RESPONSIBILITIES OF ALL PUBLIC SERVANTS IN THE COUNTY. VIOLATION OF ANY OF THE MANDATORY STANDARDS MAY RESULT IN ENFORCEMENT ACTION.
(SEE IMPLEMENTING ORDER 7-7)**

Electronic proposal responses to this RFP are to be submitted through a secure mailbox at BidSync until the date and time as indicated in this document. It is the sole responsibility of the Proposer to ensure its proposal reaches BidSync before the Solicitation closing date and time. There is no cost to the Proposer to submit a proposal in response to a Miami-Dade County solicitation via BidSync. Electronic proposal submissions may require the uploading of electronic attachments. The submission of attachments containing embedded documents or proprietary file extensions is prohibited. All documents should be attached as separate files. All proposals received and time stamped through the County's third party partner, BidSync, prior to the proposal submittal deadline shall be accepted as timely submitted. The circumstances surrounding all proposals received and time stamped after the proposal submittal deadline will be evaluated by the procuring department in consultation with the County Attorney's Office to determine whether the proposal will be accepted as timely. Proposals will be opened promptly at the time and date specified. The responsibility for submitting a proposal on or before the stated time and date is solely and strictly the responsibility of the Proposer. The County will in no way be responsible for delays caused by technical difficulty or caused by any other occurrence. All expenses involved with the preparation and submission of proposals to the County, or any work performed in connection therewith, shall be borne by the Proposer(s).

A Proposer may submit a modified proposal to replace all or any portion of a previously submitted proposal up until the proposal due date. The County will only consider the latest version of the proposal. For competitive bidding opportunities available, please visit the County's Internal Services Department website at: <http://www.miamidade.gov/procurement/>.

Requests for additional information or inquiries must be made in writing and submitted using the question/answer feature provided by BidSync at www.bidsync.com. The County will issue responses to inquiries and any changes to this Solicitation it deems necessary in written addenda issued prior to the proposal due date (see addendum section of BidSync Site). Proposers who obtain copies of this Solicitation from sources other than through BidSync risk the possibility of not receiving addenda and are solely responsible for those risks.

1.0 PROJECT OVERVIEW AND GENERAL TERMS AND CONDITIONS

1.1 Introduction

Miami-Dade County, hereinafter referred to as the County, as represented by the Miami-Dade County Information Technology Department, is soliciting proposals to obtain a cloud-hosted solution for mainframe reports (Solution) to replace the IBM Content Manager OnDemand System. The Solution will capture, index and store mainframe reports. The proposed Solution is anticipated to manage the expiration of the reports based on defined policies and provides security segmentation of reports. The Solution shall be inclusive of all software licensing, implementation, integration, configuration, customization, data conversion, training, software maintenance and support services.

The County anticipates awarding a contract for a five (5) year period, with two (2) additional two (2) year option to renew.

The anticipated schedule for this Solicitation is as follows:

Solicitation Issued:

Pre-Proposal Conference: See front cover for date, time, and place. Attendance is recommended but not mandatory. If you need a sign language interpreter or materials in accessible format for this event, please call the ADA Coordinator at (305) 375-2013 or email hjwriq@miamidade.gov at least five days in advance.

Deadline for Receipt of Questions:

Proposal Due Date: See front cover for date and time.

Evaluation Process:

Projected Award Date:

1.2 Definitions

The following words and expressions used in this Solicitation shall be construed as follows, except when it is clear from the context that another meaning is intended:

1. The word "Contractor" to mean the Proposer that receives any award of a contract from the County as a result of this Solicitation, also to be known as "the prime Contractor".
2. The word "County" to mean Miami-Dade County, a political subdivision of the State of Florida.
3. The word "Proposal" to mean the properly signed and completed written good faith commitment by the Proposer submission in response to this Solicitation by a Proposer for the Services, and as amended or modified through negotiations.
4. The word "Proposer" to mean the person, firm, entity or organization, as stated on the Proposal Submittal Form, submitting a proposal to this Solicitation.
5. The words "Scope of Services" to mean Section 2.0 of this Solicitation, which details the work to be performed by the Contractor.
6. The word "Solicitation" to mean this Request for Proposals (RFP) document, and all associated addenda and attachments.
7. The word "Solution" to mean the software, implementation, information and technologies to support the business and technical capabilities required as detailed in the Scope of Services.
8. The word "Subcontractor" to mean any person, firm, entity or organization, other than the employees of the Contractor, who contracts with the Contractor to furnish labor, or labor and materials, in connection with the Services to the County, whether directly or indirectly, on behalf of the Contractor.
9. The words "Work", "Services", "Program", or "Project" to mean all matters and things that will be required to be done by the Contractor in accordance with the Scope of Services, and the terms and conditions of this Solicitation.

1.3 General Proposal Information

The County may, at its sole and absolute discretion, reject any and all or parts of any or all proposals; accept parts of any and all proposals; further negotiate project scope and fees; postpone or cancel at any time this Solicitation process; or waive any irregularities in this Solicitation or in the proposals received as a result of this process. In the event that a Proposer wishes to take an exception to any of the terms of this Solicitation, the Proposer shall clearly indicate the exception in its proposal. No exception shall be taken where the Solicitation specifically states that exceptions may not be taken. Further, no exception shall be allowed that, in the County's sole discretion, constitutes a material deviation from the requirements of the Solicitation. Proposals taking such exceptions may, in the County's sole discretion, be deemed nonresponsive. The County reserves the right to request and evaluate additional information from any Proposer regarding Proposer's responsibility after the submission deadline as the County deems necessary.

The Proposer's proposal will be considered a good faith commitment by the Proposer to negotiate a contract with the County, in substantially similar terms to the proposal offered and, if successful in the process set forth in this Solicitation and subject to its conditions, to enter into a contract substantially in the terms herein. Proposer proposal shall be irrevocable until contract award unless the proposal is withdrawn. A proposal may be withdrawn in writing only, addressed to the County contact person for this Solicitation, prior to the proposal due date and time, or upon the expiration of 180 calendar days after the opening of proposals.

As further detailed in the Proposal Submittal Form, Proposers are hereby notified that all information submitted as part of, or in support of proposals will be available for public inspection after opening of proposals, in compliance with Chapter 119, Florida Statutes, popularly known as the "Public Record Law."

Any Proposer who, at the time of proposal submission, is involved in an ongoing bankruptcy as a debtor, or in a reorganization, liquidation, or dissolution proceeding, or if a trustee or receiver has been appointed over all or a substantial portion of the property of the Proposer under federal bankruptcy law or any state insolvency law, may be found non-responsible.

To request a copy of any code section, resolution and/or administrative/implementing order cited in this Solicitation, the Proposer must contact the Clerk of the Board at (305) 375-5126, Monday- Friday, 8:00 a.m. – 4:30 p.m.

1.4 **Aspirational Policy Regarding Diversity**

Pursuant to Resolution No. R-1106-15, Miami-Dade County vendors are encouraged to utilize a diverse workforce that is reflective of the racial, gender and ethnic diversity of Miami-Dade County and employ locally-based small firms and employees from the communities where work is being performed in their performance of work for the County. This policy shall not be a condition of contracting with the County, nor will it be a factor in the evaluation of solicitations unless permitted by law.

1.5 **Cone of Silence**

Pursuant to Section 2-11.1(t) of the Code of Miami-Dade County, as amended, a "Cone of Silence" is imposed upon each RFP or RFQ after advertisement and terminates at the time a written recommendation is issued. The Cone of Silence prohibits any communication regarding RFPs or RFQs between, among others:

- potential Proposers, service providers, lobbyists or consultants **and** the County's professional staff including, but not limited to, the County Mayor and the County Mayor's staff, County Commissioners or their respective staffs;
- the County Commissioners or their respective staffs **and** the County's professional staff including, but not limited to, the County Mayor and the County Mayor's staff; or
- potential Proposers, service providers, lobbyists or consultants, any member of the County's professional staff, the Mayor, County Commissioners or their respective staffs **and** any member of the respective Competitive Selection Committee.

The provisions do not apply to, among other communications:

- oral communications with the staff of the Vendor Services Section, the responsible Procurement Contracting Officer, provided the communication is limited strictly to matters of process or procedure already contained in the Solicitation document;
- oral communications at pre-proposal conferences and oral presentations before Competitive Selection Committees during any duly noticed public meeting, public presentations made to the Board of County Commissioners during any duly noticed public meeting;
- recorded contract negotiations and contract negotiation strategy sessions; or
- communications in writing at any time with any County employee, official or member of the Board of County Commissioners unless specifically prohibited by the applicable RFP or RFQ documents.

When the Cone of Silence is in effect, all potential vendors, service providers, bidders, lobbyists and consultants shall file a copy of any written correspondence concerning the particular RFP or RFQ with the Clerk of the Board, which shall be made available to any person upon request. The County shall respond in writing (if County deems a response is necessary) and file a copy with the Clerk of the Board, which shall be made available to any person upon request. Written communications may be in the form of e-mail, with a copy to the Clerk of the Board at clerkbcc@miamidadegov.

All requirements of the Cone of Silence policies are applicable to this Solicitation and must be adhered to. Any and all written communications regarding the Solicitation are to be submitted only to the Procurement Contracting Officer with a copy to the Clerk of the Board. The Proposer shall file a copy of any written communication with the Clerk of the Board. The Clerk of the Board shall make copies

available to any person upon request.

1.6 Communication with Competitive Selection Committee Members

Proposers are hereby notified that direct communication, written or otherwise, to Competitive Selection Committee members or the Competitive Selection Committee as a whole are expressly prohibited. Any oral communications with Competitive Selection Committee members other than as provided in Section 2-11.1 of the Code of Miami-Dade County are prohibited.

1.7 Public Entity Crimes

Pursuant to Paragraph 2(a) of Section 287.133 of the Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal for a contract to provide any goods or services to a public entity; may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit proposals on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and, may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 of the Florida Statutes for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

1.8 Lobbyist Contingency Fees

- a) In accordance with Section 2-11.1(s) of the Code of Miami-Dade County, after May, 16, 2003, no person may, in whole or in part, pay, give or agree to pay or give a contingency fee to another person. No person may, in whole or in part, receive or agree to receive a contingency fee.
- b) A contingency fee is a fee, bonus, commission or non-monetary benefit as compensation which is dependent on or in any way contingent upon the passage, defeat, or modification of: 1) any ordinance, resolution, action or decision of the County Commission; 2) any action, decision or recommendation of the County Mayor or any County board or committee; or 3) any action, decision or recommendation of any County personnel during the time period of the entire decision-making process regarding such action, decision or recommendation which foreseeably will be heard or reviewed by the County Commission or a County board or committee.

1.9 Collusion

In accordance with Section 2-8.1.1 of the Code of Miami-Dade County, where two (2) or more related parties, as defined herein, each submit a proposal for any contract, such proposals shall be presumed to be collusive. The foregoing presumption may be rebutted by the presentation of evidence as to the extent of ownership, control and management of such related parties in preparation and submittal of such proposals. Related parties shall mean Proposer, the principals, corporate officers, and managers of the Proposer; or the spouse, domestic partner, parents, stepparents, siblings, children or stepchildren of a Proposer or the principals, corporate officers and managers thereof which have a direct or indirect ownership interest in another Proposer for the same contract or in which a parent company or the principals thereof of one Proposer have a direct or indirect ownership in another Proposer for the same contract. Proposals found to be collusive shall be rejected. Proposers who have been found to have engaged in collusion may be considered non-responsible, and may be suspended or debarred, and any contract resulting from collusive bidding may be terminated for default.

2.0 SCOPE OF SERVICES

2.1 Current Application and Processes

Background

In the early 2000s, ITD implemented IBM's Content Manager on Demand (CMOD) on the IBM mainframe to manage the County's enterprise content generated on the mainframe. One of the primary functions of selecting CMOD was CMOD'S ability to segment reports based on given user security requirements.

2.1 Current Application and Processes

The County currently utilizes IBM CMOD on ITD's IBM Mainframe z/12 2828 H13 z/OS 2.2 (the latest hyper maintenance applied). There are approximately 2,000 active users from varying departments using CMOD. Today's content is approximately 10GB in size, consisting of approximately 7,700 folder objects or reports. CMOD uses segmentation in reports for information security. An on-site User Administrator defines user access to the CMOD system and grants access to specified reports.

2.2 Objectives

The County is seeking a Solution that will:

1. Transfer reports from the IBM Mainframe to the Solution as the reports are created by applications on the mainframe to a given SYSOUT class in the JCL
2. Maintain the same report security segmentation as the CMOD, whereby the segmentation is content-based, there can be multiple segments on any given report
3. Migrate the existing report templates to the Solution while maintaining the same retention periods and security segmentation
4. Use the County's Active Directory (AD) for authentication

The proposed Solution will be the primary repository for IBM Mainframe user reports. The Solution should be scalable so that other report types from other sources and additional users can be added in the future.

2.3 Functionalities

The County is seeking the following functionality:

- Provide the ability to do Security segmentation in the reports, whereby the segmentation is content-based, there can be multiple segments on any given report
- Match report retention to current configuration, and documents that have not yet expired must be migrated to the new Solution
- Provide a web-based thin client user interface
- Have cloud implementation that meet Miami-Dade County Criminal Justice Information Services (CJIS) security compliance requirements, as applicable
- Allow the Administrator function (managing users and defining reports) to continue to be managed by an ITD employee, provide recommended roles and responsibilities of other support personnel.
- Provide training for supporting and using Solution
- Be scalable in terms of adding capacity for more reports and users as the number of reports may grow over five years, but not expected to be more than 10% per year
- Interface with ITD's IBM Mainframe z/12 2828 H13 z/OS 2.2 (the latest Hyper maintenance applied)
- Be able to move reports from the Mainframe to the Solution
- ~~Provide a production environment service level agreement 24x7 that must have a high availability solution of 99.99%~~
- Provide a ~~production solution~~ Solution that has a Disaster Recovery (DR) ~~capabilities~~ solution and shall be able to participate in the County's Disaster Recovery (DR) exercises, at least two times per year, whereby the DR ~~capabilities~~ Solution are accessible ~~from MDC's DR solution by the County~~ for the purpose of testing reports during the exercise without affecting the production environment
- Support multiple types of content; support multiple types of documents (ASCII, EDCIDIC, AFP, DJDE/Metacode, PDF, PCL, Postscript, Word, Excel, images, digital pictures, etc); captured data and documents must be stored in the original format and not be transformed
- Be able to extract and migrate Advanced Function Presentation (AFP) data in current system to the new Solution maintaining any index data and resources required to archive and present the data
- Provide advanced retention management capabilities to control scheduled deletion at the report level, report version level and for individual sections or pages within a report
- Provide the ability to place a report, document, version of a report, and individual sections or pages of a report on legal hold to override pre-defined retention policies; the legal hold is to be set in the system through a user interface or through external events triggered via an API
- Ability for data redaction of report and document content to be performed on a policy basis and dynamically created upon retrieval. Redaction policies must support security models by user and/or group authentication rules automatically
- Leverage a web-based thin client viewer developed using HTML5 and JSON versus JAVA
- Generate archives that are encrypted.
- Retrieve content through a web-based user interface or optionally through a RESTful services based API

Commented [GB(1)]: I am assuming from this item that the Solution is exposed to CJJ data. MDPD underwent a recent audit and we now have a new section that needs to be added to the RFP and draft agreement as a result. We can pull the language from RFP-01154.

Note: The infrastructure of the Solution, including any servers, storage, web application servers and databases must be provided as a fully managed, hosted service.

2.4 Integrations

The County is seeking the following integrations:

- Interface with ITD's IBM Mainframe z/12 2828 H13 z/OS 2.2 (the latest Hyper maintenance applied) for reporting purposes
- Maintain compatibility with future upgrades of the mainframe hardware and/or OS
- Be certified to run in a scalable cloud environment.
- Be compatible with the County's Active Directory (AD) and Single Sign-on (SSO) via Security Assertion Markup Language (SAML) (ADFS service provider)

2.62.5 Configuration

The proposed Solution shall have a web-based user interface in which no software is installed on client devices.

2.72.6 Data Conversion

The selected Proposer will transfer the existing CMOD reports as outlined in Section 2.12 into the proposed Solution, including completion of any data conversion required to complete the transfer. Post-As part of implementation, the selected Proposer will transfer all designated user reports from the mainframe to the Solution.

2.82.7 Training

The selected Proposer shall provide on-site training for ITD User Administrators. Additionally, training for all Report Users is requested. The County will consider multiple training options (on-site or web-based) for Report Users. Additionally, the selected Proposer shall provide continuously accessible web training throughout the life of the contract. The estimated number of users for training and expected number of licenses required are as follows:

Role	Estimate
Report Users	2,000
User Administrators	2 Users

2.92.8 Project Management

The selected Proposer shall assess and report the current status of the Solution implementation and provide the designated Project Manager with overall direction in managing the implementation of the Solution. The project planning and management task of the selected Proposer may include but not be limited to review of initial phase reports, recommendation of overall direction for implementation, assist the County in setting priorities, develop schedules for entire project and in more detail for each of the phases, identify resource requirements, define milestones and resource requirements, and define software testing method. Upon the time of award, the selected Proposer shall provide the County with a detailed report on the selected Proposer's recommended schedule of implementation, including work schedule and completion dates which will be adhered to by the selected Proposer. This document shall be submitted for approval prior to commencement. The Selected Proposer shall also provide an electronic version of the company's training manual and operations manual. The County reserves the right to reproduce and post electronically the training and operations manuals for the County's use.

2.442.9 Maintenance and Technical Support

The County is seeking maintenance services and technical support, as listed below.

1. All software must be of the most recent release and all software upgrades issued by the Selected Proposer must be available to the County at no additional charge. The software maintenance plan shall include the installation of new releases by the selected Proposer.
2. Corrections of substantial defects so that the Solution will operate according to specifications to be resolved as Severity Level 1. See Section 2.102 chart below for the County's desired escalation and response times.
3. Periodic updates of the Solution may incorporate:
 - Corrections of any substantial defects;
 - Fixes of any minor bugs; and,
 - Fixes due to any conflicts with mandatory operating security patches, to be resolved as Severity Level 1; and,
 - Enhancements made to any solution components that the County has licensed.
4. Updates to the Solution must be provided as determined by legally mandated requests
6. Maintenance of other non-production County environments, such as test, development, staging, and DRDR will be included as part of support, if applicable.

Commented [BC(2)]: Not applicable to cloud this is applicable, the software will need to be patched and upgraded

Commented [GB(3)]: Yes, there will be patches and upgrades, but for a cloud solution, there is no other option that to have the vendor do it. The County does not have access to run updates, so this language is not applicable.

Commented [BC(4)]: Add recent release language (ISD)

Add question to proposer how handle need for test environment cloning environment for DR

2.432.10 Escalation and Response Times

3 The selected Proposer shall be responsible for providing on-call technical support services 24 hours per day, 7 days 365 days per year, to ensure optimal performance of the Solution system, including all components.

The County desires an escalation and response time as listed below:

Severity	Definition	Response Time	Resolution Time	Status Frequency Update
1=Critical	A major component of the Solution, whether hardware or software, is in a non-responsive state and severely affects Users' productivity or operations. A high impact problem which affects the Users.	15 minutes	One (1) Hour	15 minutes
2=Urgent	Any component failure or loss of functionality not covered in Severity 1, which is hindering operations, such as, but not limited to: excessively slow response time; functionality degradation; error messages; backup problems; or issues affecting the use of a module or the data.	One (1) Hour	Four (4) Hours	30 minutes
3=Important	Lesser issues, questions, or items that minimally impact the work flow or require a work around.	4 hours	Twenty-four (24) Hours	Four (4) Hours
4=Minor	Issues, questions, or items that don't impact the work flow. Issues that can easily be scheduled such as an upgrade or patch.	8 hours	72 hours for an acceptable work around until final resolution	Weekly Status Call

2.11 Criminal Justice Information Security

Any contract awarded to a private contractor/vendor wherein a software application/program that accesses, processes, and stores criminal justice information (CJI), or the selected private contractor/vendor requires physical or logical access to the County's network which contains CJI, must comply with all security policy requirements outlined in the Florida Department of Law Enforcement's (FDLE) Criminal Justice Information Systems (CJIS) Security Policy, as outlined at the following link:

[http://benchmarks.cisecurity.org/downloads/browse/index.cfm?category=benchmarks.](http://benchmarks.cisecurity.org/downloads/browse/index.cfm?category=benchmarks)

The selected Proposer, and any of its employees or sub-contractors, that requires physical or logical access to the County's network must review the Federal Bureau of Investigation's (FBI) CJIS Security Addendum (attached as Annex A to the Draft Form of Agreement), and sign the FBI's CJIS Security Addendum Certification upon completion of a fingerprint, criminal background check, proof of citizenship or authorization to be employed in the United States, and successful passing of the CJIS Security Awareness Test (attached as Annex B to the Draft Form of Agreement), biennially.

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3.42.12 Cloud Services

1. The Solution ~~should all~~ be a high availability/fault tolerant solution maintaining availability of 99% uptime annually. Routine maintenance or administrative procedures should not require Solution to be off-line or a re-start to take effect.
2. Network requirements
 - a. The Solution should be designed to effectively mitigate latency and data speed issues
 - b. Appropriate bandwidth required to ensure optimal performance for concurrent application access and data access for "normal" daily operational use
3. The Solution ~~shall have~~ should provide fully automated backups.

3.0 RESPONSE REQUIREMENTS

3.1 Submittal Requirements

In response to this Solicitation, Proposer should **complete and return the entire Proposal Submission Package**. Proposers should carefully follow the format and instructions outlined therein. All documents and information must be fully completed and signed as required and submitted in the manner described.

The proposal shall be written in sufficient detail to permit the County to conduct a meaningful evaluation of the proposed services. However, overly elaborate proposals are not requested or desired.

4.0 EVALUATION PROCESS

4.1 Review of Proposals for Responsiveness

Each proposal will be reviewed to determine if the proposal is responsive to the submission requirements outlined in this Solicitation. A responsive proposal is one which follows the requirements of this Solicitation, includes all documentation, is submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the proposal being deemed non-responsive.

4.2 Evaluation Criteria

Proposals will be evaluated by a Competitive Selection Committee which will evaluate and rank proposals on criteria listed below. The Competitive Selection Committee will be comprised of appropriate County personnel and members of the community, as deemed necessary, with the appropriate experience and/or knowledge, striving to ensure that the Competitive Selection Committee is balanced with regard to both ethnicity and gender. The criteria are itemized with their respective weights for a maximum total of one hundred (100) points per Competitive Selection Committee member.

<u>Technical Criteria</u>	<u>Points</u>
1. Proposer's relevant experience and qualifications including key personnel of the Proposer and any key personnel of subcontractors, that will be assigned to this project, and experience and qualifications of subcontractors.	20
2. Proposer's approach and methodology to providing the services requested in this Solicitation.	20
3. Proposed timeline for complete Solution implementation, including completion of all customization, configuration, integration, testing, and final solution acceptance.	10
4. Solution Functionality: Proposer's capability to meet the functional and technical specifications described in this Solicitation, together with an evaluation of how well it matches the Proposer's	30

understanding of the County's needs described in Section 2.0, Scope of Services, of this Solicitation.

Price Criteria

5. Proposed price will be evaluated based on the Solution proposed and overall best value to the County. 20

4.3 Oral Presentations

Upon evaluation of the technical and price criteria indicated above, rating and ranking, the Competitive Selection Committee may choose to conduct an oral presentation with the Proposer(s) which the Competitive Selection Committee deems to warrant further consideration based on, among other considerations, scores in clusters and/or maintaining competition. (See Affidavit – "Lobbyist Registration for Oral Presentation" regarding registering speakers in the proposal for oral presentations.) Upon completion of the oral presentation(s), the Competitive Selection Committee will re-evaluate, re-rate and re-rank the proposals remaining in consideration based upon the written documents combined with the oral presentation.

4.4 Selection Factor

This Solicitation includes a selection factor for Miami-Dade County Certified Small Business Enterprises (SBE's) as follows. A SBE/Micro Business Enterprise is entitled to receive an additional ten percent (10%) of the total technical evaluation points on the technical portion of such Proposer's proposal. An SBE/Micro Business Enterprise must be certified by Small Business Development for the type of goods and/or services the Proposer provides in accordance with the applicable Commodity Code(s) for this Solicitation. For certification information contact Small Business Development at (305) 375-2378 or <http://www.miamidade.gov/smallbusiness/>

The SBE/Micro Business Enterprise must be certified by proposal submission deadline, at contract award, and for the duration of the contract to remain eligible for the preference. Firms that graduate from the SBE Program during the contract term may remain on the contract.

4.5 Local Certified Veteran Business Enterprise Preference

This Solicitation includes a preference for Miami-Dade County Local Certified Veteran Business Enterprises in accordance with Section 2-8.5.1 of the Code of Miami-Dade County. "Local Certified Veteran Business Enterprise" or "VBE" 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 proposal or bid submittal is certified by the State of Florida Department of Management Services as a veteran business enterprise pursuant to Section 295.187 of the Florida Statutes. A VBE that submits a proposal in response to this solicitation is entitled to receive an additional five percent of the evaluation points scored on the technical portion of such vendor's proposal. If a Miami-Dade County Certified Small Business Enterprise (SBE) measure is being applied to this Solicitation, a VBE which also qualifies for the SBE measure shall not receive the veteran's preference provided in this section and shall be limited to the applicable SBE preference. At the time of proposal submission, the firm must affirm in writing its compliance with the certification requirements of Section 295.187 of the Florida Statutes and submit this affirmation and a copy of the actual certification along with the Proposal Submittal Form.

4.6 Price Evaluation

The price proposal will be evaluated subjectively in combination with the technical proposal, including an evaluation of how well it matches Proposer's understanding of the County's needs described in this Solicitation, the Proposer's assumptions, and the value of the proposed services. The pricing evaluation is used as part of the evaluation process to determine the highest ranked Proposer. The County reserves the right to negotiate the final terms, conditions and pricing of the contract as may be in the best interest of the County.

4.7 Local Preference

The evaluation of competitive solicitations is subject to Section 2-8.5 of the Miami-Dade County Code of Miami-Dade County, which, except where contrary to federal or state law, or any other funding source requirements, provides that preference be given to local businesses. If, following the completion of final rankings by the Competitive Selection Committee a non-local Proposer is the highest ranked responsive and responsible Proposer, and the ranking of a responsive and responsible local Proposer is within 5% of the ranking obtained by said non-local Proposer, then the Competitive Selection Committee **will** recommend that a contract be negotiated with said local Proposer.

4.8 Negotiations

Commented [GB(5)]: We need to check this language. I don't think this is current.

Commented [GB(6)]: Can't do both after and in combination.

The Competitive Selection Committee will evaluate, score and rank proposals, and submit the results of the evaluation to the County Mayor or designee with its recommendation. The County Mayor or designee will determine with which Proposer(s) the County shall negotiate, if any, taking into consideration the Local Preference Section above. The County Mayor or designee, at their sole discretion, may direct negotiations with the highest ranked Proposer, negotiations with multiple Proposers, and/or may request best and final offers. In any event the County engages in negotiations with a single or multiple Proposers and/or requests best and final offers, the discussions may include price and conditions attendant to price.

Notwithstanding the foregoing, if the County and said Proposer(s) cannot reach agreement on a contract, the County reserves the right to terminate negotiations and may, at the County Mayor's or designee's discretion, begin negotiations with the next highest ranked Proposer(s). This process may continue until a contract acceptable to the County has been executed or all proposals are rejected. No Proposer shall have any rights against the County arising from such negotiations or termination thereof.

Any Proposer recommended for negotiations shall complete a Collusion Affidavit, in accordance with Section 2-8.1.1 of the Code of Miami-Dade County. (If a Proposer fails to submit the required Collusion Affidavit, said Proposer shall be ineligible for award.)

Any Proposer recommended for negotiations may be required to provide to the County:

- a) Its most recent certified business financial statements as of a date not earlier than the end of the Proposer's preceding official tax accounting period, together with a statement in writing, signed by a duly authorized representative, stating that the present financial condition is materially the same as that shown on the balance sheet and income statement submitted, or with an explanation for a material change in the financial condition. A copy of the most recent business income tax return will be accepted if certified financial statements are unavailable.
- b) Information concerning any prior or pending litigation, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the Proposer, any of its employees or subcontractors is or has been involved within the last three years.

4.9 Contract Award

Any proposed contract, resulting from this Solicitation, will be submitted to the County Mayor or designee. All Proposers will be notified in writing of the decision of the County Mayor or designee with respect to contract award. The Contract award, if any, shall be made to the Proposer whose proposal shall be deemed by the County to be in the best interest of the County. Notwithstanding the rights of protest listed below, the County's decision of whether to make the award and to which Proposer shall be final.

4.10 Rights of Protest

A recommendation for contract award or rejection of all proposals may be protested by a Proposer in accordance with the procedures contained in Sections 2-8.3 and 2-8.4 of the Code of Miami-Dade County, as amended, and as established in Implementing Order No. 3-21.

5.0 TERMS AND CONDITIONS

The County's anticipated form of agreement is attached. Proposers should review the draft in its entirety

6.0 ATTACHMENTS

Draft Form of Agreement

Exhibit 1 - Cloud Service Usage Policy

Proposal Submission Package:

Proposer Information Section

Web Forms – Proposal Submittal Form, Fair Subcontract Practices Affidavit, Subcontractor Listing, Lobbyist

Registration Form, and Contractor Due Diligence Affidavit

Form 1 – Price Proposal Schedule