

# ISSUING DEPARTMENT INPUT DOCUMENT

## CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

New   
  OTR   
  Sole Source   
  Bid Waiver   
  Emergency   
 Previous Contract/Project No. FB-00001

Contract  
 Re-Bid   
  Other – Access of Other Entity Contract   
 LIVING WAGE APPLIES:  YES  NO

Requisition No./Project No.: RQID1900056   
 TERM OF CONTRACT 5 YEAR(S) WITH 0 YEAR(S) OTR

Requisition /Project Title: Commercial Records Management Services

Description: The purpose of this solicitation is to establish a contract for the purchase of commercial records management services for various Miami-Dade County departments on an “as-needed” basis. The services vary from storage, retrieval, delivery of file folders/boxes, etc...

Issuing Department: AV   
 Contact Person: Laura Miret   
 Phone: 305-869-8593

Estimate Cost: \$764,000

Funding Source:   
 GENERAL    
 FEDERAL    
 OTHER

### ANALYSIS

<b>Commodity Codes:</b>	<span style="border: 1px solid black; padding: 2px;">962-95</span>	<span style="border: 1px solid black; padding: 2px;">971-70</span>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>
Contract/Project History of previous purchases 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>		
<b>Contractor:</b>	<span style="border: 1px solid black; padding: 2px;">GRM Information Manage</span>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>		
<b>Small Business Enterprise:</b>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>		
<b>Contract Value:</b>	<span style="border: 1px solid black; padding: 2px;">873,400</span>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>		
<b>Comments:</b>	<span style="border: 1px solid black; padding: 2px;">Previous contract 5 yrs</span>				

Continued on another page (s):     YES     NO

### RECOMMENDATIONS

	Set-Aside	Subcontractor Goal	Bid Preference	Selection Factor
<b>SBE</b>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>	<span style="border: 1px solid black; padding: 2px;"></span>

Basis of Recommendation:

<b>Signed:</b> <span style="border: 1px solid black; padding: 2px;"></span>	Date sent to SBD: <span style="border: 1px solid black; padding: 2px;"></span>
	Date returned to SPD: <span style="border: 1px solid black; padding: 2px;"></span>

## SECTION 2

### SPECIAL TERMS AND CONDITIONS

#### **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 and retrieval, document destruction, and imaging/scanning for various Miami-Dade County (County) Departments, on an "as-needed" basis.

#### **2.2 TERM OF CONTRACT**

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 Blanket Purchase Order issued by the Internal Services Department, Strategic Procurement Division. The contract shall expire on the last day of the sixtieth (60th) month.

#### **2.3 METHOD OF AWARD**

Award of this contract will be made to the lowest priced responsive and responsible Bidder on a group-by-group basis. Bidder(s) may submit offers for one or both groups. To be considered for award of a group, Bidder(s) shall offer prices for all items within the group. If a Bidder fails to submit an offer for all items within a group, its offer for the group may be rejected.

Group (A) Non-Federally Funded Purchases

Group (B) Federally-Funded Purchases

##### **Submittal Requirements for Groups (A) and (B)**

Bidder(s) shall comply with each requirement below:

2.3.1 Bidder(s) should be regularly engaged in the business of providing commercial records management services as described in this solicitation. Bidder(s) must provide references from customers to whom it has provided or is currently providing services that are similar to those described in this solicitation for a period of at least two (2) years. The references must include the company's entity name, and the name, title, e-mail address and telephone number of the contact person who can verify that the Bidder(s) has successfully provided or is currently providing commercial records management services. These references shall ascertain to the County's satisfaction that the Bidder has sufficient expertise and success in the following four (4) commercial records management service areas:

1. Pick-up and delivery of file folders/boxes of records to be stored.
2. Document destruction, shredding.
3. Warehouse storage and retrieval.
4. Digital storage and scanning retention.

- 2.3.2 Have storage facility(ies) located in Miami-Dade or Broward Counties, Florida, that can provide the commercial record management services. Bidder shall provide the firm's storage facility(ies) main address(es), phone number(s) and hours of operation.
- 2.3.3 Bidder(s) must have designated staff working telephones, separate facsimile lines and/or email addresses to expedite quotes.
- 2.3.4 Bidder(s) shall certify that firm complies with the following regulations:
1. Florida Administrative code rules 1B24 and 1B26 for Public Records Scheduling and Deposition to include Electronic Recordkeeping
    - a. Rule: 1B-24.003:  
<https://www.flrules.org/gateway/RuleNo.asp?title=PUBLIC%20RECORDS%20SCHE%20DULING%20AND%20DISPOSITION&ID=1B-24.003>
    - b. Rule: 1B-26.003:  
<https://www.flrules.org/gateway/RuleNo.asp?title=RECORDS%20MANAGEMENT%20-%20STANDARDS%20AND%20REQUIREMENTS&ID=1B-26.003>
  2. Florida Statute 119 - Public Records  
<http://www.flsenate.gov/Laws/Statutes/2010/Chapter119>

**Submittal Requirements for Group (B) (ONLY)**

Bidder(s) shall comply with each requirement below:

2.3.5 EXEMPTION TO CERTAIN CLAUSES (Applies to Group B only)

The contract to be awarded under this solicitation will be accessed by PHCD. As a Federally-funded agency, certain clauses within this solicitation do not apply to that Department's allocation:

- Section 1 Paragraph 1.11 (Local Preferences)
- Section 1, Paragraph 1.28 (Office of the Inspector General)
- Section 1 Paragraph 1.36 (County User Access Program - UAP)
- Section 1, Paragraph 1.44 (Small Business Contract Measures)
- Section 1, Paragraph 1.45 (Local Certified Veteran's Business Enterprise Preference)
- Section 1, Paragraph 1.47 (First Source Hiring Referral Program).

2.3.6 COMPLIANCE WITH FEDERAL REGULATIONS DUE TO FEDERAL FUNDING (Applies to Group B only)

PHCD will be using this contract and since some of the goods and/or services that will be acquired under this solicitation may be purchased, in part or in whole, with federal funding, it is hereby agreed and understood that Section 60-250.4, Section 60-250.5 and Section 60-741.4 of Title 41 of the United States Code, which addresses Affirmative Action requirements for disabled workers, is incorporated into this solicitation and resultant contract by reference.

2.3.7 MINIMUM WAGES BASED ON THE DAVIS BACON ACT (Applies to Group B only)

Since this solicitation is being processed in conjunction with federal funding, the wage rate paid to all classifications of employees of the bidder for the work under this solicitation shall not be less than the prevailing wage rates for similar classification of work in Dade County, Florida, as established in the Federal Area Wage Decision by the United States Department of Labor. Additionally, all federal regulations and statutes adopted by U.S. Department of Labor as a result of the Davis Bacon Act shall prevail during the term of this contract. Bidder(s) shall comply with the regulations of the Davis Bacon Act, pay wages in accordance with the act, submit to the County certify copies of their payroll whenever requested, allow the County to perform interviews to their work force and allow the County to inspect their payrolls as it may deem necessary. The above agreement shall be used only when federal funds are utilized for specific project in excess of \$2,000.00.

2.3.8 SECTION 3 REQUIREMENTS (Applies to Group B only)

This contract is a Section 3 covered activity for Public Housing and Community Development (PHCD). Section 3 requires that job training, employment and contracting opportunities be directed toward low and very-low income persons and to businesses that provide economic opportunities to those persons. Bidder(s) are required to execute and submit Document 00400, "Section 3 Economic Opportunity and Affirmative Marketing Plan (Plan)", with the bid (see Housing Affidavits Appendix "B" and Attachment 1). An executed Plan document is the bidder's certification that he or she will take all necessary affirmative marketing steps required, in connection with each PHCD project award, to (a) meet Section 3 training and employment goals, where feasible, when filling vacant or new positions resulting from PHCD awards, and also seek to recruit qualified minorities and women to fill vacant or new positions resulting from PHCD awards, and (b) meet Section 3 subcontracting goals and ensure small, minority and women subcontractors are used (where subcontracting is permitted). See Appendix B: Section 3 of the HUD Act of 1968.

2.3.9 PHCD USHUD GENERAL TERMS AND CONDITIONS (Applies to Group B only)

**1. HUD Instructions to Offerors Non-Construction (Form HUD-5369-B)**

This provision is designed to provide information to prospective contractors about the solicitation stage of the procurement process. Terms and conditions which apply to the contract upon award are referred to as contract clauses. Form HUD-5369-B contains provisions to be included in all solicitations for non-construction work.

**2. Certifications and Representations of Offerors Non-Construction Contract (Form HUD-5369-C)**

Form HUD-5369-C includes clauses required by OMB's common rule on bidding/offering procedures, implemented by HUD in 2 CFR part 200, and those requirements set forth in Executive Order 11625 for small, minority, women-owned businesses, and certifications for independent price determination, and conflict of interest.

**3. General Conditions for Non-Construction Contracts Section I – (With or without Maintenance Work) (Form HUD-5370C)**

This form is applicable to any contract agreement entered into between Miami-Dade County, as represented by PHCD, and the successful offeror(s). Form HUD-5370-C includes clauses.

**2.4 PRICES**

The prices proposed by the awarded Bidder(s) shall remain fixed for the duration of the contract.

**2.5 INDEMNIFICATION AND INSURANCE**

**PENDING**

**2.6 ADDITIONAL ITEMS OR SERVICES**

While the County has listed all major services within this solicitation which are utilized by County departments in conjunction with their operations, there may be similar items or services that may be purchased by the County during the term of this contract. Under these circumstances, a County representative may contact the awarded Bidder to obtain a price quote for the similar items or services. The County reserves the right to award these similar items or services to the awarded Bidder based on a price quote, to negotiate pricing, or to acquire the items or services through a separate solicitation.

## SECTION 3

### SCOPE OF WORK/TECHNICAL SPECIFICATIONS

#### **3.1 SCOPE OF WORK**

This contract will be utilized for commercial records management services including storage, retrieval, delivery of file folders/boxes archive boxes, vault storage, document destruction, and imaging/scanning for various Miami-Dade County (County) Departments, on an "as-needed" basis.

#### **3.2 GOODS/SERVICES TO BE PROVIDED**

The awarded Bidder(s) shall provide the following required services:

- 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:
  2. Florida Administrative code rules 1B-24.003 and 1B-26.003 for Public Records Retention Scheduling and Deposition to include Electronic Recordkeeping
    - a. Rule: 1B-24.003:  
<https://www.flrules.org/gateway/RuleNo.asp?title=PUBLIC%20RECORDS%20SCHE%20DULING%20AND%20DISPOSITION&ID=1B-24.003>
    - b. Rule: 1B-26.003:  
<https://www.flrules.org/gateway/RuleNo.asp?title=RECORDS%20MANAGEMENT%20-%20STANDARDS%20AND%20REQUIREMENTS&ID=1B-26.003>
  3. Florida Statute 119 - Public Records
    - a. <http://www.flsenate.gov/Laws/Statutes/2010/Chapter119>

#### **3.2.1 PICK-UP, DELIVERY, RETRIEVAL, REMOVAL AND NEW ADDITIONS**

Awarded Bidder(s) shall:

1. Provide initial pick-up per box/pallet from designated sites County owned and/or operated.
2. Provide additional pick-up per box/pallet from designated sites County owned and/or operated.
3. Provide deliveries per box to designated sites County owned and/or operated.
4. Provide barcode sheet (16 barcode per sheet) record management.
5. Provide boxes for additional records to be stored.
6. Provide retrieval and refiling per box/pallet.

7. Provide emergency delivery within twenty (24) hours per box/pallet upon the County's request.
8. Provide for the permanent removal of boxes, upon the County's request.

### **3.2.2 MONTHLY WAREHOUSE STORAGE**

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

### **3.2.3 DOCUMENT DESTRUCTION**

The awarded Bidder(s) shall provide document destruction of records per box and have the capability to provide certification of destruction of records upon the request of the County.

### **3.2.3 RETENTION SERVICES**

The awarded Bidder(s) shall:

1. Provide scanning retention services. Scanning retention services will consist of scanning 8.5 x 11 documents (single & double sided). The documents will need to be pulled from County offices, packed and transported to the awarded bidder(s) scanning location; where the awarded bidder(s) will digitally convert the documents. The County shall transport the information to be scanned to the awarded bidder(s). The documents will have approximately 40-50 staples between every 100-120 pages. Documents should be filed using index fields. Some of the index fields will be easily located, while some may need to be researched. Documents will require a minimum of seven (7) index fields.
2. Provide approximately five (5) gigabytes of digital storage per user department, upon the County's request.

## **3.3 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 1/2" 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. Have a controlled environment for temperature and humidity for paraffin tissue blocks (78°F)
- e. For security of the County files, the facility must be secure and provide protection against unauthorized intrusion and access to the County's stored records.
- f. 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.
- g. Have no windows in any stack areas.

- h. 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.
- i. Be clean, well-organized, and free of rodent and pest infestation.
- j. Possess a twenty-four (24) hour interior and exterior security system electronically linked to local police and fire departments.
- k. Be insured against damages or loss to stored property.
- l. Provide for goods to be stored adequately, ventilated, and must have heat and smoke detectors in areas where County files are stored.

### **3.4 TRANSITION FROM PRIOR CONTRACT**

Upon Contract expiration or termination, there will be no permanent removal fee associated with the move-out of records from the incumbent Contractors and no electronic index data will be provided to subsequent Contractor(s). The incumbent Contractor shall ensure a seamless transfer of records (a 30-60 day transition period) and be responsible for coordinating the transfer and movement of records, files, boxes and pallets with any subsequent Contractor(s) necessary to transition the services of this Contract.

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