

Solicitation 744-11384

Enterprise Content Management System (ECMS) and Professional Services

Bid designation: Public



City of Fort Lauderdale

Bid 744-11384

Enterprise Content Management System (ECMS) and Professional Services

Bid Number **744-11384**
Bid Title **Enterprise Content Management System (ECMS) and Professional Services**

Bid Start Date **Mar 6, 2014 1:33:39 PM EST**
Bid End Date **Apr 2, 2014 2:00:00 PM EDT**
Question & Answer
End Date **Mar 21, 2014 5:00:00 PM EDT**

Bid Contact **Richard Ewell**
Procurement Specialist II
Procurement Services
954-828-5138
rewell@fortlauderdale.gov

Pre-Bid Conference **Mar 14, 2014 2:00:00 PM EDT**
Attendance is optional
Location: Fort Lauderdale City Hall
100 N Andrews Avenue
2nd Floor Conference Room
Fort Lauderdale, FL 33301
Conference Bridge Telephone Number: 954-828-7451
Meeting: 1112

Changes made on Mar 13, 2014 9:01:42 AM EDT

Pre-Bid Conference Changes	Pre-Bid Conference information has changed. Please review all Pre-Bid Conferences.
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Changes were made to the following items:
Enterprise Content Management System (ECMS) and Professional Services

Changes made on Mar 20, 2014 7:43:48 AM EDT

New Documents	11384 PreBid Sign In.pdf
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Changes were made to the following items:
Enterprise Content Management System (ECMS) and Professional Services

Changes made on Mar 25, 2014 8:07:56 AM EDT

Previous End Date	Mar 31, 2014 2:00:00 PM EDT	New End Date	Apr 2, 2014 2:00:00 PM EDT
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Changes were made to the following items:
Enterprise Content Management System (ECMS) and Professional Services

Description

The City of Fort Lauderdale, Florida is seeking proposals from qualified proposers to procure an Enterprise Content Management system solution, including professional services for the City of Fort Lauderdale, in accordance with the terms, conditions, and specifications contained in this Request for Proposals. The City prefers to provision a system that is simple but powerful, cost effective and provides for rapid deployment.

For a copy of the RFP, go to www.bidsync.com.

Added on Mar 13, 2014:
Conference Bridge Information:

Date: 14 Mar. 2014
Start Time: 02:00 PM

Conference Bridge Telephone Number: 954-828-7451
Meeting ID: 1112

Added on Mar 20, 2014:

Pre-bid meeting sign in sheet has been attached.

Added on Mar 25, 2014:

Bid end date extended to April 2, 2014, 2:00 EDT.

Changes made on Mar 13, 2014 9:01:42 AM EDT

Changes made on Mar 20, 2014 7:43:48 AM EDT

Changes made on Mar 25, 2014 8:07:56 AM EDT

RFP: #744-11384
TITLE: Enterprise Content Management System (ECMS) and Professional Services

PART I – INTRODUCTION/INFORMATION

01. PURPOSE

The City of Fort Lauderdale, Florida (City) is seeking proposals from qualified proposers, hereinafter referred to as the Contractor, to procure an Enterprise Content Management system solution, including professional services for the City of Fort Lauderdale, in accordance with the terms, conditions, and specifications contained in this Request for Proposals (RFP). Any use of vendor specific terminology is purely accidental and unintentional. The City prefers to procure a system that is simple but powerful, cost effective and provides for rapid deployment.

02. INFORMATION OR CLARIFICATION

For information concerning technical specifications, please utilize the question / answer feature provided by BidSync at www.bidsync.com. Questions of a material nature must be received prior to the cut-off date specified in the RFP Schedule. Material changes, if any, to the scope of services or bidding procedures will only be transmitted by written addendum. (See addendum section of BidSync Site). Contractor's please note: Proposals shall be submitted as stated in PART VII – Requirements of the Proposal. No part of your proposal can be submitted via FAX. No variation in price or conditions shall be permitted based upon a claim of ignorance. Submission of a proposal will be considered evidence that the Contractor has familiarized themselves with the nature and extent of the work, and the equipment, materials, and labor required. The entire proposal must be submitted in accordance with all specifications contained in this solicitation. The questions and answers submitted in BidSync shall become part of any contract that is created from this RFP.

03. TRANSACTION FEES

The City of Fort Lauderdale uses BidSync (www.bidsync.com) to distribute and receive bids and proposals. There is no charge to vendors/contractors to register and participate in the solicitation process, nor will any fees be charged to the awarded vendor.

04. PRE-PROPOSAL CONFERENCE

There will be a pre-proposal conference meeting, also available via Phone Conference on the date and time specified in the Schedule Section of the RFP. It is strongly suggested that all Contractor's attend the pre-proposal conference.

While attendance is not mandatory, opportunities at other times might not be available. It is the sole responsibility of the Contractor to become familiar with the scope of the City's requirements and systems prior to submitting a proposal.

No variation in price or conditions shall be permitted based upon a claim of ignorance. Submission of a proposal will be considered evidence that the proposer has familiarized himself with the nature and extent of the work, and the equipment, materials, and labor required.

05. ELIGIBILITY

To be eligible for award of a contract in response to this solicitation, the Contractor must demonstrate that they have successfully completed services, as specified in the Technical Specifications / Scope of Services section of this solicitation and are normally and routinely engaged in performing such services, and are properly and legally licensed to perform such work. In addition, the Contractor must have no conflict of interest with regard to any other work performed by the Contractor for the City of Fort Lauderdale.

Contractor must respond to all requested information in this Request for Proposal.

06. PRICING/DELIVERY

All prices quoted shall be firm and fixed. Pricing shall be in the format contained in PART VIII – PROPOSAL PAGES – COST PROPOSAL of the RFP. Alternative approaches for the pricing of the requested products and services may be submitted; however, such alternate approaches shall be described separately and must be in addition to the format in Part VIII. Do not include cost or price figures anywhere except in the cost and pricing section, unless otherwise requested or instructed.

07. RFP DOCUMENTS

The Contractor shall examine this RFP carefully. Ignorance of the requirements will not relieve the Contractor from liability and obligation under the Contract.

08. AWARD

The City reserves the right to award to that proposer who will best serve the interests of the City, for the product/service that will best serve the needs of the City of Fort Lauderdale.

The City also reserves the right to waive minor variations in the specifications and in the bidding process. The City further reserves the right to accept or reject any and/or all proposals and to award or not award a contract based on this bid solicitation.

09. PRICE VALIDITY

Prices provided in this Request for Proposal (RFP) are valid for 120 days from time of RFP opening. The City shall award contract within this time period or shall request to the recommended awarded vendor an extension to hold pricing, until products/services have been awarded.

PART II - RFP SCHEDULE

EVENT	DATE/TIME
Release of RFP	March 6, 2014
Pre-Proposal Conference Meeting, also available via Phone Conference for this date	March 14, 2014 City Hall, 100 N Andrews Avenue, 2nd Floor Conference Room 2 PM EST - Conference Bridge Information will be provided via Bidsync in advance of the meeting
Deadline for Questions/Request for Clarifications	March 21, 2014
Proposal Due Date/Time (Deadline)	March 31, 2014

PART III - SPECIAL CONDITIONS

01. **GENERAL CONDITIONS**
RFP General Conditions Form G-107 Rev. 07/13 (GC) are included and made a part of this RFP.
02. **NEWS RELEASES/PUBLICITY**
News releases, publicity releases, or advertisements relating to this contract or the tasks or projects associated with the project shall not be made without prior City approval.
03. **RFP DOCUMENTS**
The Contractor shall examine this RFP carefully. Ignorance of the requirements will not relieve the Contractor from liability and obligations under the Contract.
04. **CONTRACTORS' COSTS**
The City shall not be liable for any costs incurred by Contractor in responding to this RFP.
05. **RULES AND PROPOSALS**
The signer of the proposal must declare that the only person(s), company or parties interested in the proposal as principals are named therein; that the proposal is made without collusion with any other person(s), company or parties submitting a proposal; that it is in all respects fair and in good faith, without collusion or fraud; and that the signer of the proposal has full authority to bind the principal Contractor.
06. **CONTRACT PERIOD**
The initial contract term shall commence upon final System Acceptance system and deliverables of the contract by the City and shall expire four (4) year(s) from that date or the day after the current contract expires, whichever is later. The City reserves the right to extend the contract for two (2) additional two(2) year terms providing all terms conditions and specifications remain the same, both parties agree to the extension, and such extension is approved by the City.

In the event services are scheduled to end because of the expiration of this contract, the Contractor shall continue the service upon the request of the City as authorized by the awarding authority. The extension period shall not extend for more than ninety (90) days beyond the expiration date of the existing contract. The Contractor shall be compensated for the service at the rate in effect when this extension clause is invoked by the City.
07. **COST ADJUSTMENTS**
Prices quoted shall be firm for the initial contract term. No cost increases shall be accepted in this initial contract term. Please consider this when providing your pricing for this request for proposal.

Thereafter, any extensions which may be approved by the City shall be subject to the following: Costs for any extension terms shall be subject to an adjustment only if increases or decreases occur in the industry. Such adjustment shall be based on the latest yearly percentage increase in the All Urban Consumers Price Index (CPI-U) as published by the Bureau of Labor Statistics, U.S. Department of Labor, and shall not exceed five percent (5%).

The yearly increase or decrease in the CPI shall be that latest Index published and available for the calendar year ending 12/31, prior to the end of the contract year then in effect, as compared to the index for the comparable month, one-year prior.

Any requested adjustment shall be fully documented and submitted to the City at least ninety (90) days prior to the contract anniversary date. Any approved cost adjustments shall become effective on the beginning date of the approved contract extension.

The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, or considered to be excessive, or if decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the Contract will be considered cancelled on the scheduled expiration date.

08. **CONTRACT COORDINATOR**

The City may designate a Contract Coordinator whose principal duties shall be:

- Liaison with Contractor.

- Coordinate and approve all work under the contract.

- Resolve any disputes.

- Assure consistency and quality of Contractor's performance.

- Schedule and conduct Contractor performance evaluations and document findings.

- Review and approve for payment all invoices for work performed or items delivered.

09. **INVOICES/PAYMENT**

A payment schedule shall be developed with the awarded vendor based upon an agreed schedule of deliverables.

The City will accept a single invoice on the acceptance and approval by the City of the completely installed and operational system, following the test period, in accordance with the RFP specifications.

The invoice shall fully detail the related costs and shall specify the status of the particular task or project as of the date of the invoice as regards the accepted schedule for that task or project. Payment will be made within forty-five (45) days after receipt of an invoice acceptable to the City, in accordance with the Florida Local Government Prompt Payment Act. If, at any time during the contract, the City shall not approve or accept the Contractor's work product, and agreement cannot be reached between the City and the Contractor to resolve the problem to the City's satisfaction, the City shall negotiate with the Contractor on a payment for the work completed and usable to the City.

10. RELATED EXPENSES/TRAVEL EXPENSES

All related expenses chargeable to the City, such as supplies, printing, binders, etc shall be passed through at Contractor's cost. Related expenses shall not include any postage, telephone toll charges, or other charges incurred in the normal course of business.

Any travel out of the tri-county (Dade, Broward and Palm Beach Counties) area shall be in accordance with current City per diem rates and travel policy. Current policy may be viewed at the City website: http://www.fortlauderdale.gov/purchasing/travel/9_4_1.pdf. No costs for travel, meals, or accommodations shall be charged to the City for travel within the tri county area unless the Contractor's office assigned to the project is located outside this area. Proposer shall include as a part of the solicitation response, all details and costs regarding anticipated travel expenses and note such costs on the price sheet as a separate line item.

Contractor shall incur no travel or related expenses chargeable to the City without prior approval by an authorized City representative (City's travel officer).

Contractor shall provide, if required by the City, documentation of all actual travel or related costs.

11. NO EXCLUSIVE CONTRACT/ADDITIONAL SERVICES

While this contract is for software procurement and services as provided to the City as referenced in this Request for Proposals, the City will require similar work for the various City departments. Contractor agrees to take on such work unless such work would not be considered reasonable or become an undue burden to the Contractor. Subsequent Work or 'Task Orders' will be made part of the original agreement (e.g., Task Order, 1, 2 and so on). Each task Order and Scope of Work will be developed and approved prior to any work being performed.

Contractor agrees and understands that the contract shall not be construed as an exclusive arrangement and further agrees that the City may, at any time, secure similar or identical services from another vendor at the City's sole option.

The City may require additional items or services of a similar nature, but not specifically listed in the contract. The Contractor agrees to provide such items or services, and shall provide the City prices on such additional items or services based upon a formula or method, which is the same or similar to that used in establishing the prices in his proposal. If the price(s) offered are not acceptable to the City, and the situation cannot be resolved to the satisfaction of the City, the City reserves the right to procure those items or services from other vendors, or to cancel the contract upon giving the Contractor thirty (30) days written notice.

12. DELETION OR MODIFICATION OF SERVICES

The City reserves the right to delete any portion of the Contract at any time without cause, and if such right is exercised by the City, the total fee shall be reduced in the same ratio as the estimated cost of the work deleted bears to the estimated cost of the work originally planned. If work has already been accomplished on the portion of the Contract to be deleted, the Contractor shall be paid for the deleted portion on the basis

of the estimated percentage of completion of such portion.

If the Contractor and the City agree on modifications or revisions to the task elements, after the City has approved work to begin on a particular task or project, and a budget has been established for that task or project, the Contractor will submit a revised budget to the City for approval prior to proceeding with the work.

13. **SUBSTITUTION OF PERSONNEL**

It is the intention of the City that the Contractor's personnel proposed for the contract will be available for the initial Scope of Work. In the event the Contractor wishes to substitute trained, qualified, personnel for those listed in the proposal, the City shall receive prior notification and have the right to review, test and approve such substitutions. The Contractor shall propose personnel of equal or higher qualifications and all replacement personnel are subject to City approval. In the event substitute personnel are not satisfactory to the City and the matter cannot be resolved to the satisfaction of the City, the City reserves the right to cancel the Contract for cause. See Section 5.09 General Conditions.

14. **INSURANCE**

The Contractor shall furnish proof of insurance requirements as indicated below. The coverage is to remain in force at all times during the contract period. The following minimum insurance coverage is required. The City is to be added as an "additional insured" with relation to General Liability Insurance. This MUST be written in the description section of the insurance certificate, even if you have a check-off box on your insurance certificate. Any costs for adding the City as "additional insured" will be at the contractor's expense.

The City of Fort Lauderdale shall be given notice 10 days prior to cancellation or modification of any stipulated insurance. The insurance provided shall be endorsed or amended to comply with this notice requirement. In the event that the insurer is unable to accommodate, it shall be the responsibility of the Contractor to provide the proper notice. Such notification will be in writing by registered mail, return receipt requested and addressed to the Procurement Services Division.

The Contractor's insurance must be provided by an A.M. Best's "A-" rated or better insurance company authorized to issue insurance policies in the State of Florida, subject to approval by the City's Risk Manager. Any exclusions or provisions in the insurance maintained by the contractor that precludes coverage for work contemplated in this RFP shall be deemed unacceptable, and shall be considered breach of contract.

Workers' Compensation and Employers' Liability Insurance

Limits: Workers' Compensation – Per Florida Statute 440
Employers' Liability - \$500,000

Any firm performing work on behalf of the City of Fort Lauderdale must provide Workers' Compensation insurance. Exceptions and exemptions will be allowed by the City's Risk Manager, if they are in accordance with Florida Statute. For additional information contact the Department of Financial Services, Workers' Compensation Division at (850) 413-1601 or on the web at www.fldfs.com.

Commercial General Liability Insurance

Covering premises-operations, products-completed operations, independent contractors and contractual liability.

Limits: Combined single limit bodily injury/property damage \$1,000,000.

This coverage must include, but not limited to:

- a. Coverage for the liability assumed by the contractor under the indemnity provision of the contract.
- b. Coverage for Premises/Operations
- c. Products/Completed Operations
- d. Broad Form Contractual Liability
- e. Independent Contractors

Automobile Liability Insurance

Covering all owned, hired and non-owned automobile equipment.

Limits: Bodily injury	\$250,000 each person, \$500,000 each occurrence
Property damage	\$100,000 each occurrence

Professional Liability (Errors & Omissions)

Consultants

Limits: \$2,000,000 per occurrence

A copy of **ANY** current Certificate of Insurance should be included with your proposal.

In the event that you are the successful bidder, you will be required to provide a certificate naming the City as an "additional insured" for General Liability.

Certificate holder should be addressed as follows:

City of Fort Lauderdale
Procurement Services Division
100 N. Andrews Avenue, Room 619
Fort Lauderdale, FL 33301

15. SUBCONTRACTORS

If the Contractor proposes to use subcontractors in the course of providing these services to the City, this information shall be a part of the bid response. Such information shall be subject to review, acceptance and approval of the City, prior to any contract award. The City reserves the right to approve or disapprove of any subcontractor candidate in its best interest and to require Contractor to replace subcontractor with one that meets City approval.

Contractor shall ensure that all of Contractor's subcontractors perform in accordance with the terms and conditions of this Contract. Contractor shall be fully responsible for all of Contractor's subcontractors' performance, and liable for any of Contractor's

subcontractors' non-performance and all of Contractor's subcontractors' acts and omissions. Contractor shall defend, at Contractor's expense, counsel being subject to the City's approval or disapproval, and indemnify and hold harmless the City and the City's officers, employees, and agents from and against any claim, lawsuit, third-party action, or judgment, including any award of attorney fees and any award of costs, by or in favor of any Contractor's subcontractors for payment for work performed for the City.

16. **INSURANCE – SUBCONTRACTORS**

Contractor shall require all of its subcontractors to provide the aforementioned coverage as well as any other coverage that the contractor may consider necessary, and any deficiency in the coverage or policy limits of said subcontractors will be the sole responsibility of the contractor.

17. **PAYMENT AND PERFORMANCE BOND**

The Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Payment and Performance Bond, in the amount of the proposed price as surety for faithful performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Payment and Performance Bond. The Performance Bond must be executed by a surety company or recognized standing to do business in the State of Florida and having a resident agent.

The Contractor must have a Financial Size Categories (FSC) rating of no less than "A-" by the latest edition of Best's Key Rating Guide, or acceptance of insurance company that holds a valid Florida Certificate of Authority issued by the State of Florida, Department of Insurance, and are members of the Florida Guarantee Fund.

Acknowledgement and agreement is given by both parties that the amount herein set for the Payment and Performance Bond is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

18. **OWNERSHIP OF WORK**

The City shall have full ownership and the right to copyright, otherwise limit, reproduce, modify, sell, or use all of the work or product produced under this contract without payment of any royalties or fees to the Contractor above the agreed hourly rates and related costs.

Any customized software code or deliverable written upon the request of City for the use of City, together with any related documentation, flowcharts, drawing, charts, source codes, object codes, upgrades, revisions, enhancements and derivative works may be considered works jointly-owned by both Contractor and City unless otherwise agreed in writing by the City and the Contractor or in the Task Order(s). A copy of all custom source code developed, but not included in the Contractor's core Product Set, shall be provided to City upon completion and acceptance.

19. UNCONTROLLABLE CIRCUMSTANCES ("Force Majeure")

The City and Contractor will be excused from the performance of their respective obligations under this agreement when and to the extent that their performance is delayed or prevented by any circumstances beyond their control including, fire, flood, explosion, strikes or other labor disputes, act of God or public emergency, war, riot, civil commotion, malicious damage, act or omission of any governmental authority, delay or failure or shortage of any type of transportation, equipment, or service from a public utility needed for their performance, provided that:

A. The non performing party gives the other party prompt written notice describing the particulars of the Force Majeure including, but not limited to, the nature of the occurrence and its expected duration, and continues to furnish timely reports with respect thereto during the period of the Force Majeure;

B. The excuse of performance is of no greater scope and of no longer duration than is required by the Force Majeure;

C. No obligations of either party that arose before the Force Majeure causing the excuse of performance are excused as a result of the Force Majeure; and

D. The non performing party uses its best efforts to remedy its inability to perform. Notwithstanding the above, performance shall not be excused under this Section for a period in excess of two (2) months, (in the event that any parts of the system are hosted off premise, performance shall not be excused under this Section for a period in excess of eight (8) hours) provided that in extenuating circumstances, the City may excuse performance for a longer term. Economic hardship of the Contractor will not constitute Force Majeure. The term of the agreement shall be extended by a period equal to that during which either party's performance is suspended under this Section.

20. PUBLIC ENTITY CRIMES

NOTE: Contractor, by submitting a proposal attests she/he/it has not been placed on the convicted vendor list.

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 on 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, Florida Statutes, for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

21. CANADIAN COMPANIES

The City may enforce in the United States of America or in Canada or in both countries a judgment entered against the Contractor. The Contractor waives any and all defenses to the City's enforcement in Canada, of a judgment entered by a court in the United States of America. All monetary amounts set forth in this Contract are in United States dollars.

22. LOBBYING ACTIVITIES

ALL CONTRACTORS PLEASE NOTE: Any contractor submitting a response to this solicitation must comply, if applicable, with City of Fort Lauderdale Ordinance No. C-00-27 & Resolution No. 07-101, Lobbying Activities. Copies of Ordinance No. C-00-27 and Resolution No. 07-101 may be obtained from the City Clerk's Office on the 7th Floor of City Hall, 100 N. Andrews Avenue, Fort Lauderdale, Florida. The ordinance may also be viewed on the City's website at:

http://www.fortlauderdale.gov/clerk/LobbyistDocs/lobbyist_ordinance.pdf .

23. BID TABULATIONS/INTENT TO AWARD

(Notice of Intent to Award Contract/Bid, resulting from the City's Formal solicitation process, requiring City Commission action, may be found at

http://www.fortlauderdale.gov/purchasing/notices_of_intent.htm. Tabulations of receipt of those parties responding to a formal solicitation may be found at

<http://www.fortlauderdale.gov/purchasing/bidresults.htm>, or any interested party may call the Procurement Office at 954-828-5933.

24. SAMPLE CONTRACT AGREEMENT

A sample of the formal agreement template, which may be required to be executed by the awarded vendor, can be found at our website:

<http://fortlauderdale.gov/purchasing/general/contractsample021412.pdf>

25. LOCAL BUSINESS PREFERENCE

Section 2-199.2, Code of Ordinances of the City of Fort Lauderdale, (Ordinance No. C-12-04), provides for a local business preference.

In order to be considered for a local business preference, a proposer must include the Local Business Preference Certification Statement of this RFP, as applicable to the local business preference class claimed **at the time of proposal submittal**:

Upon formal request of the City, based on the application of a Local Business Preference the Proposer shall within ten (10) calendar days submit the following documentation to the Local Business Preference Class claimed:

A) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **and**

B) List of the names of all employees of the proposer and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of proposal submittal shall result in the Proposer being found ineligible for the local business preference.

THE COMPLETE LOCAL BUSINESS PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK:

<http://www.fortlauderdale.gov/purchasing/index.htm>

Definitions: The term "Business" shall mean a person, firm, corporation or other business entity which is duly licensed and authorized to engage in a particular work in the State of Florida. Business shall be broken down into four (4) types of classes:

1. Class A Business – shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **and** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
2. Class B Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **or** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
3. Class C Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone **and** staffed with full-time employees within the limits of Broward County.
4. Class D Business – shall mean any Business that does not qualify as either a Class A, Class B, or Class C business.

26. WARRANTY/EXTENDED MAINTENANCE/SUBSCRIPTIONS/LICENSES

The City requests the total system be fully warranted for a minimum of one (1) year following satisfactory installation and City Acceptance of the total system. Proposer shall state the initial software warranty in the technical proposal section of the Proposal Summary Pages.

Proposer shall also provide information and pricing for optional extended maintenance and support services that are available after expiration of the initial equipment and software warranties. Information shall include specific details on the type of coverage and all exclusions, if applicable.

Proposer should submit guaranteed annual extended maintenance and software support costs to the City for warranty services for the system proposed, in accordance with the RFP specifications.

Costs should be based on a firm, fixed, annual cost to the City for the second, third and fourth years, following initial one (1) year warranty expiration. If vendor is unable to guarantee a firm, fixed annual cost, the City will consider a maximum percentage escalator not to exceed 5% per year, or the CPI-U whichever is less.

If the City would be required to sign an extended maintenance contract, or software license agreement, Proposer shall include a copy of the standard maintenance forms(s) as a part of the RFP response. Such agreement shall be subject to City Attorney review, modification, and acceptance, if the City should elect to purchase the extended maintenance.

When new users or software are added to the system, the maintenance costs for each item should be adjusted so that all components of the system have the same renewal date. The City's fiscal year is October 1, thru September 30 of each year. The City requests that the maintenance renewal date become due October 1 of each year.

27. **INSTALLATION DATE**

Proposers shall provide a proposed timeline schedule, from date of City award, to complete the delivery of all system components, including all and any equipment, software, related supervision, and City staff training in order to provide a completed, satisfactory system installation. The delivery time shall be stated in calendar days from the date of City notification of award, or notice to proceed with delivery. Such timeline information and proposed dates shall include, but not necessarily be limited to: delivery, installation, diagnostic testing, training of designated personnel, and other phase related completion dates, in accordance with the RFP specification services.

28. **PERFORMANCE TRIAL AND ACCEPTANCE PERIOD**

The successful Contractor shall successfully complete the acceptance testing requirements within ninety (90) days following the mutually agreed upon Contract Scope of Work and Timeline schedule. The City will accept the operational product(s) when the Contractor(s) have successfully proven the respective product to function in accordance with the RFP requirements, but not to exceed one hundred and twenty (120) days from the Timeline schedule established in the Contract agreement. Performance trial and acceptance testing shall be based on the system, including all equipment and software, being fully and consistently operational for a period of not less than thirty (30) working days after receipt and installation.

The City will use this testing period to evaluate the products and verify that all requirements stated in this RFP have been met. In testing for acceptance, the City requires that the products operate problem free for thirty (30) continuous working days. If it is determined that all requirements have not been met or that resolution of any problems cannot be attained, the City reserves the right to return the product(s) at no cost to the City.

29. **SOFTWARE CODE IN ESCROW**

The City requests the software provider to put the source code for this software in escrow. This will ensure that if the provider should discontinue operations or support, the City will have a means to access this Code, if necessary. Contractor/Provider shall indicate the ability to comply with this request in the RFP Summary Pages.

30. **NEGOTIATIONS**

Negotiations may be conducted with at least the three (3) best qualified responsible offerors who submit proposals who are determined to be reasonably susceptible of being selected for award for the purpose of clarification to assure full understanding of, and conformation to, the solicitation requirements. If less than three (3) reasonable susceptible offers are received, then negotiations may be conducted with all best qualified offerors.

PART IV BACKGROUND INFORMATION

01. **City of Fort Lauderdale**

The City of Fort Lauderdale is situated on the southeast coast of Florida, centrally located between Miami and Palm Beach, encompassing more than 33 square miles, with a population of about 170,528. Fort Lauderdale is the largest of Broward County's 31 municipalities.

The City was established March 27, 1911. The Form of City Government: Commission – Manager. Fort Lauderdale is a city providing citizens with a full complement of municipal services. The major services provided by the City are administration, public works, water and sewer utility, parks and recreation, planning, permitting, code enforcement, public safety police and fire and parking Services.

The City's organizational structure at a high level can be found in Exhibit A.

02. **City of Fort Lauderdale ECMS Program Background**

City documents / records are an important resource for its staff, neighbors and public officials and are kept in numerous formats including paper, imaged and electronic copies in various systems. In 2002 the City had procured and implemented an Electronic Document Management System (EDMS) which currently contains records and metadata for Clerk's Office Agenda Items and related documents, Personnel Records, Applicant Tracking and Recruitment information, Fire Training Records, and Building Plans and Permits, all which will need to be imported into the new system once procured (Images and Metadata), as the current system will be replaced.

03. **CITYWIDE DEPLOYMENT GOALS**

The goal of the City is to implement a strategic ECMS that can enhance internal operating efficiencies and service delivery to the City's neighbors and staff. More specifically, the City seeks an ECMS solution that will deliver the following benefits:

- ***Staff time savings***
 - Reduce the time spent copying and forwarding documents to City Departments
 - Reduce or eliminate purging and boxing up of documents for transmittal to the City document storage warehouse
 - Reduce or eliminate staff time to retrieve documents from the warehouse
 - Find Information Faster
- ***Cost savings***
 - Reduce copier costs (paper, toner, and copier maintenance contracts)
 - Reduce off-site storage costs / retrieval costs
- ***Increase efficiency and staff productivity***
 - Finding and utilizing City documents / records
 - Decrease the possibility of lost files and misplaced information
 - Increase document accessibility
 - Streamline Integration and Deployment
- ***Enhanced Customer Service***
 - Improve Access to Public Records
 - Online access to City documents / records via web access to the ECMS

- **Space Savings**
 - Eliminate paper files / storage boxes and save office space
 - Mitigate or eliminate the need for document storage by Third Party Warehouse providers
- **Business Process Improvement**
 - Streamline business processes
 - Reduce staff workload
 - Shorten business process timelines with Workflow and Electronic Forms
- **Improved document Management**
 - Reduce the need for other City departments to maintain duplicate personnel documents and other official documents
 - Ensure compliance with document retention and accessibility policies
 - Improved information security and disaster recovery
 - Enforce Records Procedures with DoD-5015.2-certified Tools

04. Network and Information Systems Environment

Technology Standards	Current
Backup solution	Symantec NetBackup for physical servers , Dell Quest vRanger for Virtual Servers
Business application environment	The City is currently working with an Independent Consultant for Enterprise Resource Planning (ERP) RFP Development; Cayenta Utility Billing, SunGard OneSolution Community Development and Kronos Timekeeping Module will not be replaced in the ERP Solution. There will be a need for integration options with the above noted applications (<i>and others such as Granicus Legistar/Insite, etc.</i>) and the selected and awarded ERP Solution.
Desktop hardware	Dell OptiPlex desktops and Latitude laptops, Dell FX170 thin clients with Windows 7 embedded auto connect to a farm of Windows Server 2008 R2 servers (Fire Staff Only).
Desktop operating system	Windows 7
Email system	Exchange 2010
Firewall	CheckPoint SecurePlatform
Geographic information system (GIS)	Desktop GIS Software = Esri ArcGIS for Desktop/Web Server GIS = Esri ArcGIS for Server/Database Server GIS = Esri ArcSDE running on Microsoft SQL Server/GIS Data formats = Esri Enterprise Geodatabase, Esri file geodatabase, and Esri shapefile
Handheld devices	PARKING 14 handhelds – Motorola MC9500, Verizon network/NetMotion
EDMS Imaging/content management system	Currently emPower360
Interactive voice response system	Teleworks
Internet browser	Internet Explorer v10

Network operating system	Cisco IOS
Proxy server	ISA 2006 with Websense Integration
Relational databases	Oracle, IBM Informix, and Microsoft SQL Server(Preferred)
Remote access	CheckPoint Endpoint Security VPN and Netmotion
Report writer(s)	Cognos 8.3 FAMIS DataMart, Cognos Payroll 7.4(move to 7.5 w/Upgrade), Business Objects XI 3.1 (Risk Master); Cognos 8.4 (Cayenta); Crystal 11 and Crystal 2011
Server hardware	HP; Dell; IBM; Storage would also include NetApp
Server operating system	Microsoft; HP Unix; Linux; VMware
Server virtualization	VMware
User authentication	LDAP; Kerberos; Domain and Local accounts
Virus scanning software	SOPHOS EndPoint Security and Control v10.0
Web server software	IIS 7.5 Preferred
Databases Authentication	we use both database and operating system (Windows, UNIX) authentication

PART V - TECHNICAL SPECIFICATIONS/SCOPE OF SERVICES

01. **Scope of Work**

The scope of the proposed project(s) will provide for professional services, including project management, planning, installation, design, training, and configuration for implementation and integration services with other applications as identified for each task/work order as defined.

02. **Project Definition and Objective**

The City of Fort Lauderdale is issuing this Request for Proposal (RFP) for the purpose of selecting a qualified vendor to provide an *Enterprise Content Management System* and professional services for implementation and system integration services and desires a phased deployment approach. The City has chosen the Department of Sustainable Development (DSD) for the first task order, which consists of Building Services, Permitting, Inspections Plan Review, Code Enforcement and Urban Design and Planning.

Currently DSD maintains plans, permits and associated documents in the City's current, but outdated, Electronic Document Management system (images and metadata) formerly known as Global 360s, Empower 360, version 4 product, which will need to be imported into the new system. There are currently 296,300 images, approximately 438GB in size for the Department of Sustainable Development that will need to be imported to the new system.

The Department has also accumulated a large volume of back file hard copies during the past several years, which will be scanned and indexed and will need to be imported in to the new system as well. The City is in the process of preparing a proposal for third party scanning services, which will be require the vendor to be familiar with the ECMS system that is awarded, and also resides in the Tri-County area.

Other departments which currently have images and metadata in the current system are Human Resources, which include personnel files, recruitment folders and related documents. Fire Rescue Department maintains Fire Training Records, and the City Clerk's Office maintains Agenda's and related files and other official documents. All which will need to be imported to the new system (Images and Metadata). The total database size for all images' metadata including Building Services is approximately 21 GB.

The DSD department will also require the new ECMS system to interface with SunGard's, OneSolution, Community Development Module, for archiving of final approved plans, permits and associated documents. The project is in the very early implementation phase. We estimate that 250 named user licenses (or 120 concurrent user licenses) will be required for this department.

During the Contract period, the City will require that all existing departmental images and metadata in the current system will need to be imported into the new system and the City intends to make the ECMS solution available to additional departments, as the funds are identified and appropriated for each task by the respective departments. At

that point, additional licensing would need to be purchased to accommodate the additional users.

The City and the awarded vendor will develop a Task Order/Scope of Work for each implementation/task phase for approval prior to any work commencing. The Task Order for each Scope of Work will become an addendum to this RFP and completed contract once a vendor is selected and awarded the contract.

The Task Order, (Scope of Work, Statement of Work) may be amended as mutually agreed upon by both parties in writing and approved.

Contractor shall provide packaged software, custom software, software support (maintenance) and professional services for the implementation of the project(s) requiring electronic document management, content management systems, records management, electronic workflow, electronic forms, conversion, integration and professional services as described within the scope and requirements, to implement such projects.

Contractor shall furnish, install and maintain the systems and other items as required to perform the work that is necessary and has been contracted for. Contractor shall furnish all labor, materials, and tools, supplies as necessary to meet the project scope of work.

Contractor agrees to the addition and inclusion to the content of each Task Order, at a minimum, of the following: projected hours of Contractor Personnel per task, MS project plan including, all estimated reimbursable expenses shall be documented in contractor's proposal, approved by the City in advance, and authorized by a Task Order(s).

03. Required Services

The ECMS Contractor shall be expected to provide the following services:

- Project Management
- Hardware consulting, design, and installation
- Assist in identifying scanner needs
- Software Installation and configuration of the components
- Complete system testing of all installed components
- Integration and Interface Development
- Knowledge Transfer to Staff
- Operational Redesign Assistance
- Ongoing Support and Maintenance Services
- Training Services – Train the Trainer and Administrator Training for All components for the staff identified , including Security configuration (users, groups, access and functionality rights)
- Image and Data Migration Work with the City to create and import the current images and index fields for existing EDMS system data and images.
- Configuration of folder structure and implementation of naming best practices
- Work with the City to define and build a folder structure designed to maximize efficient use of the document management system and Transparent Records Management

3.1 Project Management

Contractor shall perform all work under this Contract in a manner satisfactory to City and in accordance with the terms and condition of the Contract. Upon the reasonable request of City, Contractor shall promptly remove and replace from the project any employee, subcontractor or any other person performing work in a manner, which is unsatisfactory to City, unprofessional, or in derogation of the Contract terms and conditions.

Contractor shall replace the Project Manager upon the request of City if the city determines that Contractor is not satisfying its Responsibilities as defined in Part XIII in the RFP, in default of any Contract provisions, or when the following performance and expectations are not met:

1. All activities of Project Manager shall be performed in a legal and ethical manner;
2. The Project Manager shall implement and enforce consistent and effective processes in the following areas:

- a) Regular communication, including weekly meetings with City and monthly status reporting contingent on City's attendance at such meetings;
- b) Project scope management / change requests;
- c) Progress tracking against project plan;
- d) Issue and risk management; and
- e) Accurate project documentation maintenance

3. Contractor shall use its best efforts to ensure that its personnel assigned to fulfill a Task Order or an obligation under the Contract have the proper skill, training, background, knowledge, experience, rights, authorizations, integrity, character, and licenses necessary to fulfill the Task Order or complete the contractual responsibility in a competent and professional manner. If City reasonably believes that any employee, officer or agent of Contractor is not performing in a manner consistent with the requirements for such a position, City shall inform Contractor of such and Contractor agrees use its reasonable discretion to replace the personnel.

4. The City hereby authorizes the City's project manager to determine in the first instance, on behalf of the City, the City's position on all questions of any nature whatsoever arising out of, under, or in connection with, or in any way related to or on account of, the Task Order(s), including without limitations: questions as to the value, acceptability and fitness of the Services; questions as to either party's fulfillment of its obligations under the Contract; negligence, fraud or misrepresentation before or subsequent to acceptance of the Proposal; questions as to the interpretation of the Scope of Services; and claims for damages, compensation and losses. The City agrees to make its determinations consistent with and within the terms of this Agreement and the Task Order(s)/Scope of Work.

3.2 Issue Resolution

City and Contractor each agree to use their best reasonable efforts to resolve promptly any functional, technical, cost overrun, and any other issue that may arise during the course of the Project. However, each party acknowledges that certain issues, by their nature, may require more time to resolve and in these situations, each party agrees to use its good faith and best reasonable efforts to expedite the resolution as soon as practicable and without delay.

3.3 Training

The City intends to explore the advantages, disadvantages and related costs of two implementation training approaches:

1. **End User Training Approach:** All end-user and technical training will be performed on-site through implementation and be performed by the Vendor.
 - a. End user implementation training will be provided by the Vendor and include joint participation by the relevant City process owner team lead supporting the process area in the new software system.
 - b. Technical Implementation training will include training for City IT staff on the technologies required to support the new system.
2. **Train the Trainer Approach:** The Vendor will incorporate a “train the trainer” approach where only key City team leads will be trained through implementation on their modules and then they will train the remainder of the City staff in their respective areas.
 - a. There could be up to 8-10 subject matter experts (SME's) for each department. This training would be provided at a City facility.
 - b. Training materials supplied by the Vendor would be used by SME's and team leads for training their staff.
 - c. Web conference or remote online tutorial sessions would be available to SME and team lead staff to participate in after initial training was completed in their module.
 - d. Technical implementation training will include training only key IT staff (3-4) to support the new system.

3.4 Maintenance and Support

1. Maintenance Services – maintenance services are to be provided by Contractor upon final acceptance of the products, services or proposals by City.
2. The Term of the Software Support Agreement shall run from the date the software is accepted by City. The City agrees to make payment for support once it can utilize the product in a production environment.

04. General System Requirements of the ECMS

The ECMS, at a minimum, should provide the following functionality

- Robust Document Management Solution
- Establish “best practices” naming conventions (for folders and documents)
- Ease of use
- Systems Management Requirements
- Records Management Requirements - DoD 5015.2 Certification (attach copy)
- Secure Deletions for permanent purges of documents
- Search and Retrieval, Full Text searches, Fuzzy Searches, Index Search

- Workflow and Electronic Forms Design and Processing, Data Validation, External data field integrations
 - Document Check/In Out and maintain document versioning
 - Document markup, Redaction, Annotations
 - Indexing, Full Text Searchable, OCR processing, Redaction, Document Markup, Controlled viewable by permissions
 - Document and Information Capture, Scanning Importing
 - Document Distribution
 - Business Process Management – Workflow Designer and Processing, Delegation of Authority /Permissions for forms that may use approval processes, Form Filing and storage converted to PDF/A
 - Security - Role- Based and Group Inherited permission Permissions
 - Electronic Forms, Internal and Anonymous public user form submission via City's Webpage
 - Ability Publish to CD for Records Requests
 - Unlimited Public Access to Web Searches /Read Only
 - Scanning, Indexing
 - Mobile device / iPad compatibility
 - Electronic Signatures
 - Required: Maintain records in the format accepted by the Rules of the State of Florida, Tiff Specification 6.0 or PDF/A
 - E-mail and print functionality of multiple selected documents
- **System Utilities/TOOLS**
 - Ability to define user access to the system including user ID, password and access privileges;
 - Ability to easily apply redaction to certain information frequently accessed by employees, citizens and other agencies, down to a field or word level
 - Ability to backup and restore any data or image file to disk storage
 - Utilities shall include on-line "help" facility
 - Ability to redact information by user access and privileges
 - Ability to generate a report log of all files access by user, data and time
 - Open Platform API and SDK (Software Development Kit)
- **Audit Trails**
 - As an added security the system must offer the ability to track who is using system, has used the system and who is viewing documents and what actions are being performed, and when.
 - Audit Trails and historical record of the state of transitions of a workflow instance from start to completion would also be required.

05. Technical Requirements

The ECMS system shall be:

- Windows Server 2008 and Higher, preferably be configured in a Virtual server environment
- Window 7, 8.1 Mac, iPad mobile Devices
- Section 508 Compliant
- Support MS SQL server 2008 and higher

- Support for Multiple systems, including VMware Environment
 - Records Management - DoD 5015.2 Certification
 - Non Proprietary Image headers
 - Support Multi Page Scanning and Storage, Multi-Function Network Scanning Desktop scanning, TWAIN, ISIS compatible
 - Provide Comprehensive Audit Reports
 - SQL Reporting Capability
 - **Conversion** - The system shall allow for the process of transforming electronic documents into the imaging system for full-text indexing of the document and later retrieval using the systems search capabilities.
 - *Conversion of images to TIFF/TIF Specification 6.0 per Florida State Electronic Records and ISO Standards, ISO 19005 - Document management - Electronic document file format for long-term preservation for PDF documents (PDF/A).*
 - Ability to interface/Integrate with other City applications, Granicus InSite for archiving published and posted items, Community Development and Planning modules of the SunGard OneSolution products, and others.
 - Open Platform API and SDK (Software Development Kit)
- **System Performance**
Response time across any potential configuration must be from 2 to 3 seconds for text only information, while images may range from 4 to 6 seconds. Image retrieval response should not exceed 7 seconds.
 - **Database Schema**
Upon Contract Award a copy of the database schema shall be provided to the City.

06. Enterprise Requirements

Other Systems that the City desires to interface with is Granicus Legistar/InSite Agendas and Attachments for Archival purposes and others as may be identified, such as Enterprise Resource Planning (ERP) System.

- Unlimited Public Search and Retrieval via Web Portal,
- A system that uses non-proprietary image file and text formats.
- A system that is flexible and will be able to expand to meet unique requirements of various departments;
- A solution to serve as a strong imaging engine to expand to meet the needs of the City Departments
- A solution which is supported by a strong and stable vendor who can survive market pressures and must be able to serve the City's long term imaging requirements; and a solution that can be supported in the City's present and future Systems environment.
- Any imaging system proposed must have the ability to expand and to interoperate/interface with various non-proprietary software packages in the future. The proposed ECM system configuration must be easily scalable. ODBC compliancy is also desired.
- The system shall allow for growth and support decentralized batch or just in time scanning, quality assurance (QA) and indexing process that comply with procedures, normal business practices, state of Florida requirements and industry standards.

- Index information should be stored in an SQL (Structured Query Language) database that is ODBC Compliant and supports multiple databases
 - ODBC compliant and support multiple databases.
- **Policy Issues/Legal Aspects/Retention Schedules**

Public Records Law: All proposal documents or other materials submitted by the proposer in response to this RFP will be open for inspection by any person and in accord with Chapter 119, Florida Statutes. The State of Florida Electronic Records and Record Management Practices will be adhered to in all areas of a system. Image System requirements must provide for purging index of data records in accordance with the General Records Schedule (GS1-SL in conjunction with GS2 0 GS15 as appropriate) For State and Local Government, dated October 1, 2013 (http://dlis.dos.state.fl.us/barm/genschedules/GS1-SL-2013_Final.pdf) along with the City's Records Retention Schedule and the State of Florida Records Management – Standard and Requirements Electronic Record keeping, Chapter 1B-26, Florida Administrative Code (http://dlis.dos.state.fl.us/barm/rules/1B26_003FAC.cfm).

07. Turnkey Solution

All prices quoted must include all available licensing options for all software and services necessary to make the system specified **fully operational** for the intent, function, and purposes stated herein. The City reserves the right to purchase hardware separately.

7.1 Hardware and Storage Environment

Describe the proposed computer hardware and storage specifications to support the system. A hardware configuration, which takes into account the size of the City, application modules, database size, and anticipated growth, must be provided.

PART VI – PROPOSAL EVALUATION CRITERIA

The award of the contract will be based on certain objective and subjective considerations listed below:

1. Understanding of the overall needs of the City as presented in the narrative technical proposal. Including the completeness and conformance with the response format of the Proposal submitted related to requirements of the RFP.

Maximum points available are 20

2. Stability of product, contractor experience, qualifications, and past performance of the proposing firm including persons proposed for the project and resources, including the extent of data/systems integration, especially prior experience with Granicus Legistar Agenda Management SunGard's OneSolution, Community Development Module including use of third party products. Client references shall be considered in this factor.

Maximum points available are 25

3. Functionality, suitability, ease of use, customization and configuration, compatibility, and upgradability of proposed equipment and software. Ability of the proposed system to comply with all the requirements of the RFP, as contained in the specifications.

Maximum points available are 25

4. Total Cost to the City: to include providing, installing, supervision, testing, training, conversions, travel costs, if applicable, and extended maintenance and support costs for up to five years following system acceptance.

Maximum points available are 30

TOTAL POINTS 100

An evaluation committee of qualified City Staff or other persons selected by the City will conduct evaluations of proposals. It may be a two-step process. In step one, the committee will evaluate all responsive proposals based upon the information and references contained in the proposals as submitted. The committee shall review each proposal and rank each proposer's evaluation criteria as stated in this RFP (i.e. criteria 1, 2, 3, 4), and determine a minimum of three (3), if more than three (3) proposals are responsive, to be finalists for further consideration. In the event there are less than three (3) responsive proposals, the committee will give further consideration to all responsive proposals received. In step two, the committee may conduct discussions (oral presentations), for clarification purposes only, with the finalists and re-score and re-rank the finalists' proposals. The evaluation committee may then make a recommendation, resulting from this process, to the City Manager for award of a contract.

The City may require visits to customer installations or demonstrations of product by Contractor's, as part of the evaluation process.

The City of Fort Lauderdale reserves the right, before awarding the contract, to require a Proposer to submit any evidence of its qualifications as the City may deem necessary, and to consider any evidence available of financial, technical and other qualifications and capabilities, including performance experience with past and present users.

The City of Fort Lauderdale reserves the right to request additional clarifying information and request an oral presentation from any and all Proposers prior to determination of award.

The City reserves the right to award the contract to that Proposer who will best serve the interest of the City. The City reserves the right based upon its deliberations and in its opinion, to accept or reject any or all proposals. The City also reserves the right to waive minor irregularities or variations to the specifications and in the bidding process.

The City uses a mathematical formula for determining allocation of evaluation criteria including cost points, to each responsive, responsible proposer. Each evaluation criteria stated in the RFP has an identified weighted factor. Each evaluation committee member will rank each criterion, from each proposer, giving their first ranked proposer as number 1, and second proposer as number 2 and so on. The City shall average the ranking for each criterion, for all evaluation committee members, and then multiply that average ranking by the weighted criteria identified in the RFP. The lowest average final ranking score will determine the recommendation by the evaluation committee to the City Manager.

PART VII - REQUIREMENTS OF THE PROPOSAL

To facilitate the analysis of responses to this RFP, the Contractor is required to prepare their proposals in accordance with the instructions outlined in this section. **Vendors must respond in full to all RFP sections and follow the RFP format (section numbering, etc.) in their response. Failure to follow these instructions may result in rejection.**

All proposals must be submitted as specified on the proposal pages, which follow. Any attachments must be clearly identified. To be considered, the proposal must respond to all parts of the RFP. Any other information thought to be relevant, but not applicable to the enumerated categories, should be provided as an appendix to the proposal. If publications are supplied by a proposer to respond to a requirement, the response should include reference to the document number and page number. Proposals not providing this reference will be considered to have no reference material included in the additional documents. The City prefers all responses to this RFP to be less than 50 pages and that the Contractor utilize recyclable materials as much as possible. Expensive or fancy binders are not preferred.

All proposals must be submitted in a sealed package with the RFP number, due and open date, and RFP title clearly marked on the outside. If more than one package is submitted they should be marked 1 of 2, etc.

THIS IS A PAPER RFP WITH CD's. All proposals must be received by the City of Fort Lauderdale, in the Procurement Services Division, Room 619, City Hall, 100 North Andrews Avenue, Fort Lauderdale, Florida, 33301 prior to 2:00 pm on the date specified in PART II – RFP SCHEDULE. Submittal of response by fax or e-mail will NOT be acceptable.

PROPOSERS MUST SUBMIT AN IDENTIFIED ORIGINAL HARD COPY, PLUS (2) ADDITIONAL HARD COPIES OF THEIR PROPOSAL PAGES INCLUDING ANY ATTACHMENTS.

THE ABOVE REQUIREMENTS TOTAL (3) HARD COPIES OF YOUR PROPOSAL. CONTRACTORS SHOULD SUBMIT YOUR PROPOSAL ALSO ON A CD. CONTRACTOR SHOULD PROVIDE (7) CD COPIES OF YOUR PROPOSAL. CD COPIES MUST MATCH THE ORIGINAL HARDCOPY. IN CASE OF ANY DISCREPANCY BETWEEN THE ORIGINAL HARD COPIES AND THE CD, THE ORIGINAL HARD COPY PREVAILS. FAILURE TO PROVIDE PROPOSALS AS STATED ABOVE, MAY BE GROUNDS TO FIND CONTRACTOR NON-RESPONSIVE.

The proposer understands that the information contained in these Proposal Pages is to be relied upon by the City in awarding the proposed Agreement, and such information is warranted by the proposer to be true. The proposer agrees to furnish such additional information, prior to acceptance of any proposal, relating to the qualifications of the proposer, as may be required by the City.

A representative who is authorized to contractually bind the Contractor shall sign the Bid/Proposal Signature page. Omission of a signature on that page may result in rejection of your proposal.

PART VIII - PROPOSAL PAGES – COST PROPOSAL

A Complete and Itemized Product License Price List along with the maintenance costs for each shall be included as an APPENDIX to the Cost Proposal, which represents your entire product line and license volume purchasing structure ,(i.e., 100-200, 200-300 and so on). Please indicate whether the licenses are based on named user or concurrent user licensing structure.

The City may not require development and/or implementation of each of the purchased modules for the for initial TASK Order for the Department of Sustainable Development (DSD) but the City requires the complete price list to assist us in our planning and rollout to for the other City departments.

Proposers shall provide itemized detail costs for all items contained in the proposed system, as an appendix to the RFP response, including all required labor, supervision, consultation, software and supplies at the costs provided.

If there are any additional costs for services or third party products required to accomplish any requirements, such as interface requirements, scanning and/or others, which may be offered as options, that are not included in the services as outlined in the RFP, Proposers shall include this information as an APPENDIX to the Cost Proposal. Be sure to take into account all areas of the RFP when responding to each of these categories.

SECTION I.

Task Order I. Scope and Requirements for the Department of Sustainable Development Professional services for initial system design, installation, implementation and Integration Services for the OneSolution Community Development application (as the project evolves). Existing document Images and metadata conversion/import of the DSD.

A. Software Licensing

– 250 Full User Licenses: \$_____

A.1 Unlimited Public Portal
Retrieval Access \$_____

A.2 Integration Tools (API, SDK...) \$_____

A.3 Subtotal (Items A, A.1, A2) \$_____

B. Professional Services

- Initial System Configuration and Implementation Costs \$_____

Estimated hours and duration _____

B.1 Task I Estimated Travel Costs \$_____

B.2 Subtotal (Items B, B1) \$_____

C. Other Professional Services: \$_____ per hour
Consulting, Project Management, etc.

C.1. Integration Services: \$_____ per hour

C.2. Conversion/Import Services: \$_____ per hour

D. Other Costs/Third Party Products
(Provide Itemized list and cost for Subtotal)

*This item may contain other costs as may be
 Identified on the appendix to this cost proposal*

\$ _____

E.1 Training Costs – Approach I. End user Training Approach

(Provide detail, total hours, cost per hour and all related travel costs)

(Onsite Training room seats available are 14 plus instructor)

	On-Site	Optional-Remote
E.1.1 End User Training	\$ _____	\$ _____
E.1.2 Admin Training	\$ _____	\$ _____
E.1.3 Electronic Forms Training	\$ _____	\$ _____
E.1.4 Workflow Training	\$ _____	\$ _____
E.1.5 Records Management Training	\$ _____	\$ _____
E.1.6 Task I Travel Costs	\$ _____	
<i>As stated in the RFP - All travel and related costs must adhere to the City's Travel Policy.</i>		
E.1.7 Subtotal On-site ONLY		\$ _____
(Items E.1.1, E.1.2, E.1.3, E.1.4, E.1.5, E.1.6)		

E. 2 Training Costs – Approach II. Train the Trainer Approach

	On-Site	Optional-Remote
E.2.1 End User Training	\$ _____	\$ _____
E.2.2 Admin Training	\$ _____	\$ _____
E.2.3 Electronic Forms Training	\$ _____	\$ _____
E.2.4 Workflow Training	\$ _____	\$ _____
E.2.5 Records Management Training	\$ _____	\$ _____
E.2.6 Task I Travel Costs	\$ _____	
<i>As stated in the RFP - All travel and related costs must adhere to the City's Travel Policy.</i>		
E.2.7 Subtotal On-site ONLY		\$ _____
(Items E.2.1, E.2.2, E.2.3, E.2.4, E.2.5, E.2.6)		

F. Software in Escrow (Extended 8 years)

Annual Cost \$_____ x 4 = Total \$_____

G. Maintenance and support costs (Provide a detailed description of items and costs as an Addendum)

Extended Maintenance/Support: Provide detailed pricing, including agreement documents that may be required, for system maintenance and on-going support for years 1 and 2, following City acceptance of the completely installed system, as contained in the RFP.

If there are additional maintenance/support services costs, not included in system maintenance and support shown above, please provide details on respective services and related costs. This information may be included as an appendix to your RFP response or identified in your complete product price list.

G.1 Year one (1) \$_____

G.2 Year two (2) \$_____

G.3 Year three (3) \$_____

G.4 Year four (4) \$_____

G.5 Subtotal (Items G.1, G.2, G.3, G.4) \$_____

H. Premium or Upgraded Service level Support Pricing

H.1 Year one (1) \$_____

H.2 Year two (2) \$_____

H.3 Year three (3) \$_____

H.4 Year four(4) \$_____

H.5 Subtotal (Items H.1, H.2, H.3, H.4) \$_____

I. GRAND TOTAL \$_____

OPTIONAL REMOTE TRAINING SSESSIONS**Training Costs – Approach I. End user Training Approach****Subtotal Optional Remote Training**

(Optional remote Training Items E.1.1, E.1.2, E.1.3, E.1.4, E.1.5)

\$_____

Training Costs – Approach II. Train the Trainer Approach**Subtotal Optional Remote Training**

(Optional Items E.2.1, E.2.2, E.2.3, E.2.4, E.2.5)

\$_____

SECTION II.

A. PRICE PROTECTION PERIOD/ADDITIONAL PURCHASES: The City requests that all costs contained in the RFP response shall be firm for additional purchases, should the City elect to make such purchases, for a period of twenty-four (**24**) months from date of award. Please indicate your ability to extend pricing in accordance with this request.

YES: _____ Can Comply

NO: _____ Unable to Comply

A.1 Alternate Price Protection Term: _____

PART IX - PROPOSAL PAGES - TECHNICAL PROPOSAL

The following issues should be fully responded to in your proposal in concise narrative form. Additional sheets should be used, but they should reference each issue and be presented in the same order.

- Tab 1: Bid/Proposal Signature page
- Tab 2: Cost Proposal Page
- Tab 3: Required Documents:
Non-Collusion Statement
Local Vendor Preference Form
Certificate of Insurance
- Tab 4: Letter of Interest, The letter of interest may contain any other information not in the proposal but should not exceed two (2) pages.
- Tab 5: Business Licenses. Evidence that your firm and/or persons performing the work are licensed to do business in the State of Florida.
- Tab 6: Please describe your company's experience, qualifications and past performance, including the extent of data/systems integration. Identify the individual in your organization who will act as a focal point for implementation. Include an organizational chart depicting your proposed implementation team, including titles and functional roles, and any subcontractors.
- Tab 7: Narrative - Proposals should respond to scope of work. This should describe the Proposers assessment of the City of Fort Lauderdale's needs and the quality of the proposal to meet those needs including a proposed timeline. The narrative should be no longer than five (5) pages.
- Tab 8: Please provide an overall description of **both** training methods (**End User Training Approach and Train the Trainer Approach**), including General timeframes in which both types of training will be conducted Please also list the nature, level, and amount of training to be provided for both options in each of the following areas:
- Technical training (e.g., Administration, configuration, for all modules, i.e., capture, scanning, indexing, process, publishing, forms, records management, workflow. etc.)
 - End User training
 - Other staff (e.g., executive level administrative staff)
- Tab 9: Describe the minimum and recommended hardware, software, storage, memory, operating system and other requirements for desktop computers to access the application including the proposed Server software, hardware and storage specifications to support the system. Include a hardware configuration chart, number of servers required for the different modules, etc., which takes into account the size of the City, application modules, database size, and anticipated growth.

- Tab 10: Response Part VIII – City’s Cost Proposal page and APPENDIX to the Cost Proposal including your complete line of product pricing as quoted for this proposal for the City of Fort Lauderdale.
- Tab 11: Responses to Part X – Contractor Questionnaire
- Tab 12: Include a minimum list of 5 clients/references for whom you have provided similar services in the last three years; preferably government sector client references that are using your software and where you have performed integration services with other applications, Including Granicus Legistar, NeoGov, SunGard’s OneSolution Community Development Module or others. Provide agency name, address, telephone number, email address of contact person, and date service was provided. Be prepared to provide, upon request, evidence of work product, ability to meet schedules, cooperation, and responsiveness. **Do not include City of Fort Lauderdale or its employees as references when submitting your proposal.**
- Tab 13: Any additional attachments to your proposal, including your DoD 5015.2 Certification. Please indicate the RFP section/Item and page number which your attachment refers to.

Part X – CONTRACTOR QUESTIONNAIRE

01. Company Overview

- 1) What are your company's key success factors and what differentiates you from your competition?
- 2) Please indicate if your Company has been profitable in your last 4 years of business.
- 3) What awards or certifications (if any) has your company received?
- 4) Does your company perform its own implementation and systems integration or do you outsource?

02. Product Overview

- 1) Please give an Executive Overview of your complete product line. .(Electronic Forms, Workflow, Records Management, etc.)
- 2) Describe the process to interface products with third party programs or populate your system with external systems data and data structure (fields, tables, etc.).
- 3) Does your company own full rights to the application and source code?
- 4) Is the image file header Non-Proprietary?

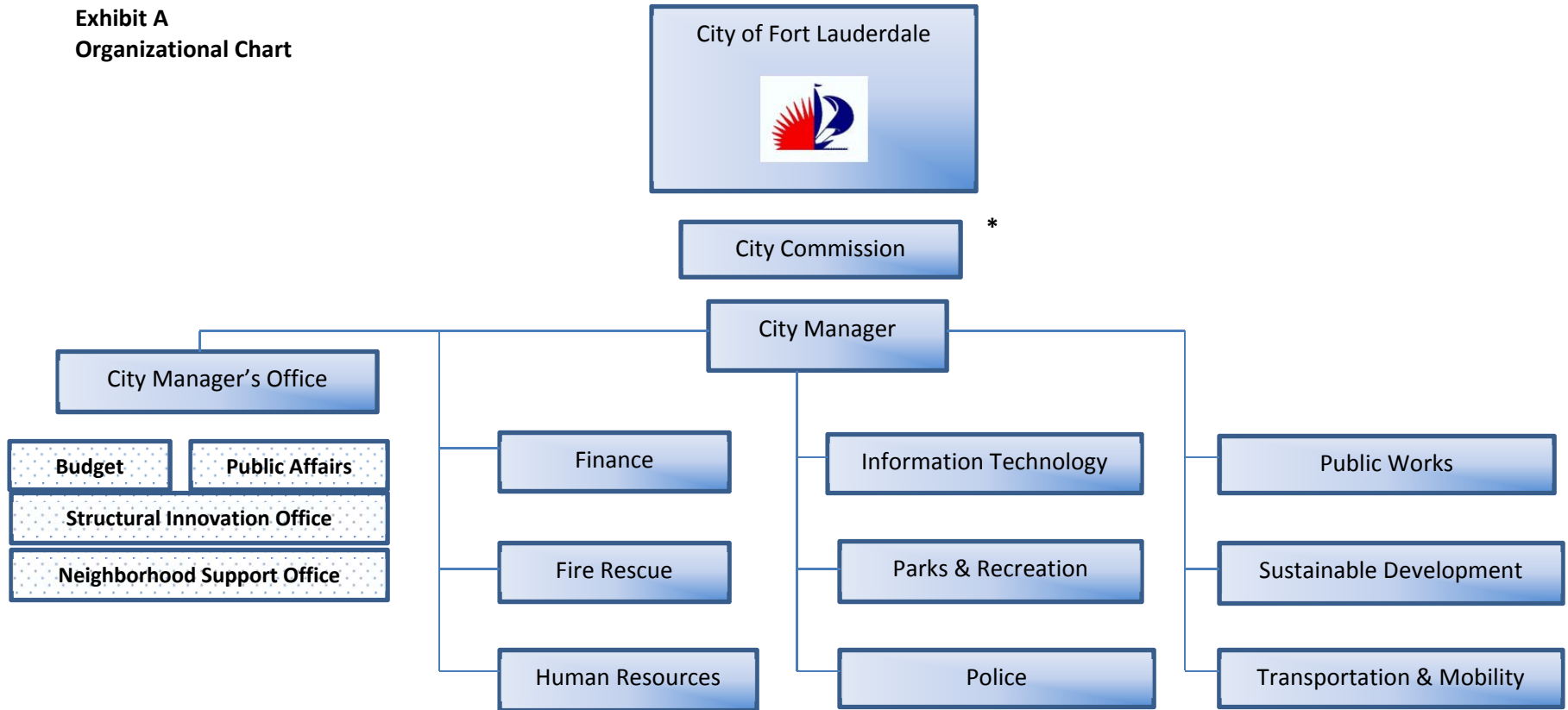
03. Implementation

1. Please list all the agencies which you have performed integration and image enabling services for , including the products Granicus Legistar/Insite, SunGard's OneSolution Community Development products and others.
2. Do you have your own internal resources or do you rely on outside resources for implementation?
3. What is your implementation lead-time in days?
4. Provide a sample implementation plan that details:
 - a. A brief description of the major steps in the implementation process.
 - b. Any major activity that involves our employees.
 - c. Time frames for critical activities and other tasks required of our organization.
5. Describe your escalation procedure for addressing problems during implementation.
6. Please submit a sample contract
7. Are you able to comply with a Service/Performance test period as specified within the RFP?

04. Customer Support and Service Levels

1. Please describe the help desk/technical support capabilities of your company.
2. Are there different tier/service levels?
3. Are all support calls and other help desk related issues handled directly by your company, or is support outsourced?
4. Do you have user group meetings?
5. Who can contact your Help Desk? (Anyone, Named Users or Administrators)
6. Is there an on-line help function available throughout process?
7. Please provide a list of specific exclusions from the maintenance/license agreement
8. Please provide your statement of response time for repair or issue correction.
9. If your company goes out of business, how will our account be handled?
10. What browsers are supported (provide minimum version supported)?
11. What kind of skill sets are required to maintain the application within our organizations?
12. What is your policy on upgrading of existing software?
13. What is the number of scheduled releases in past two years?
14. Describe how system enhancements are proposed; decided upon; and implemented.

**Exhibit A
Organizational Chart**



*Charter Offices - City Attorney's Office, the City Auditor's Office, and the City Clerk's Office report to the City Commission.

**CITY OF FORT LAUDERDALE
GENERAL CONDITIONS**

These instructions are standard for all contracts for commodities or services issued through the City of Fort Lauderdale Procurement Services Division. The City may delete, supersede, or modify any of these standard instructions for a particular contract by indicating such change in the Invitation to Bid (ITB) Special Conditions, Technical Specifications, Instructions, Proposal Pages, Addenda, and Legal Advertisement. In this general conditions document, Invitation to Bid (ITB) and Request for Proposal (RFP) are interchangeable.

PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:

- 1.01 BIDDER ADDRESS:** The City maintains automated vendor address lists that have been generated for each specific Commodity Class item through our bid issuing service, BidSync. Notices of Invitations to Bid (ITB'S) are sent by e-mail to the selection of bidders who have fully registered with BidSync or faxed (if applicable) to every vendor on those lists, who may then view the bid documents online. Bidders who have been informed of a bid's availability in any other manner are responsible for registering with BidSync in order to view the bid documents. There is no fee for doing so. If you wish bid notifications be provided to another e-mail address or fax, please contact BidSync. If you wish purchase orders sent to a different address, please so indicate in your bid response. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 PACKING SLIPS:** It will be the responsibility of the awarded Contractor, to attach all packing slips to the OUTSIDE of each shipment. Packing slips must provide a detailed description of what is to be received and reference the City of Fort Lauderdale purchase order number that is associated with the shipment. Failure to provide a detailed packing slip attached to the outside of shipment may result in refusal of shipment at Contractor's expense.
- 1.04 PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 45 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.05 TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.06 BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by the City for a period of one hundred twenty (120) days from the date of bid opening unless otherwise stated in the ITB.
- 1.07 VARIANCES:** For purposes of bid evaluation, Bidder's must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.
- By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared, by the City as conditional.
- 1.08 NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.09 MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its procurement activities. If your firm qualifies in accordance with the below definitions please indicate in the space provided in this ITB.

Minority Business Enterprise (MBE) "A Minority Business" is a business enterprise that is owned or controlled by one or more socially or economically disadvantaged persons. Such disadvantage may arise from cultural, racial, chronic economic circumstances or background or other similar cause. Such persons include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

The term "Minority Business Enterprise" means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence, minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

Women Business Enterprise (WBE) a "Women Owned or Controlled Business" is a business enterprise at least 51 percent of which is owned by females or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by females.

Small Business Enterprise (SBE) "Small Business" means a corporation, partnership, sole proprietorship, or other legal entity formed for the purpose of making a profit, which is independently owned and operated, has either fewer than 100 employees or less than \$1,000,000 in annual gross receipts.

BLACK, which includes persons having origins in any of the Black racial groups of Africa.

WHITE, which includes persons whose origins are Anglo-Saxon and Europeans and persons of Indo-European decent including Pakistani and East Indian.

HISPANIC, which includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish culture or origin, regardless of race.

NATIVE AMERICAN, which includes persons whose origins are American Indians, Eskimos, Aleuts, or Native Hawaiians.

ASIAN AMERICAN, which includes persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands.

1.10 MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION

It is the desire of the City of Fort Lauderdale to increase the participation of minority (MBE) and women-owned (WBE) businesses in its contracting and procurement programs. While the City does not have any preference or set aside programs in place, it is committed to a policy of equitable participation for these firms. Proposers are requested to include in their proposals a narrative describing their past accomplishments and intended actions in this area. If proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties have to be identified in the proposal. If a proposer is considered for award, he or she will be asked to meet with City staff so that the intended MBE/WBE participation can be formalized and included in the subsequent contract.

1.11 SCRUTINIZED COMPANIES

This Section applies to any contract for goods or services of \$1 million or more:

The Contractor certifies that it is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List and that it does not have business operations in Cuba or Syria as provided in section 287.135, Florida Statutes (2011), as may be amended or revised. The City may terminate this Contract at the City's option if the Contractor is found to have submitted a false certification as provided under subsection (5) of section 287.135, Florida Statutes (2011), as may be amended or revised, or been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or has engaged in business operations in Cuba or Syria, as defined in Section 287.135, Florida Statutes (2011), as may be amended or revised.

1.12 DEBARRED OR SUSPENDED BIDDERS OR PROPOSERS

The bidder or proposer certifies, by submission of a response to this solicitation, that neither it nor its principals and subcontractors are presently debarred or suspended by any Federal department or agency.

PART II DEFINITIONS/ORDER OF PRECEDENCE:

2.01 BIDDING DEFINITIONS The City will use the following definitions in its general conditions, special conditions, technical specifications, instructions to bidders, addenda and any other document used in the bidding process:

INVITATION TO BID (ITB) when the City is requesting bids from qualified Bidders.

REQUEST FOR PROPOSALS (RFP) when the City is requesting proposals from qualified Proposers.

BID – a price and terms quote received in response to an ITB.

PROPOSAL – a proposal received in response to an RFP.

BIDDER – Person or firm submitting a Bid.

PROPOSER – Person or firm submitting a Proposal.

RESPONSIVE BIDDER – A person whose bid conforms in all material respects to the terms and conditions included in the ITB.

RESPONSIBLE BIDDER – A person who has the capability in all respects to perform in full the contract requirements, as stated in the ITB, and the integrity and reliability that will assure good faith performance.

FIRST RANKED PROPOSER – That Proposer, responding to a City RFP, whose Proposal is deemed by the City, the most advantageous to the City after applying the evaluation criteria contained in the RFP.

SELLER – Successful Bidder or Proposer who is awarded a Purchase Order or Contract to provide goods or services to the City.

CONTRACTOR – Successful Bidder or Proposer who is awarded a Purchase Order, award Contract, Blanket Purchase Order agreement, or Term Contract to provide goods or services to the City.

CONTRACT – A deliberate verbal or written agreement between two or more competent parties to perform or not to perform a certain act or acts, including all types of agreements, regardless of what they may be called, for the procurement or disposal of equipment, materials, supplies, services or construction.

CONSULTANT – Successful Bidder or Proposer who is awarded a contract to provide professional services to the City.

The following terms may be used interchangeably by the City: ITB and/or RFP; Bid or Proposal; Bidder, Proposer, or Seller; Contractor or Consultant; Contract, Award, Agreement or Purchase Order.

2.02 SPECIAL CONDITIONS: Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,

PART III BIDDING AND AWARD PROCEDURES:

3.01 SUBMISSION AND RECEIPT OF BIDS: To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidders should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB issued by the City in separate sealed envelopes properly marked. When a particular ITB or RFP requires multiple copies of bids or proposals they may be included in a single envelope or package properly sealed and identified. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Procurement Office, or other designated area, in the presence of Bidders, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidder's and the public in accordance with applicable regulations.

3.02 MODEL NUMBER CORRECTIONS: If the model number for the make specified in this ITB is incorrect, or no longer available and replaced with an updated model with new specifications, the Bidder shall enter the correct model number on the bidder proposal page. In the case of an updated model with new specifications, Bidder shall provide adequate information to allow the City to determine if the model bid meets the City's requirements.

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- 3.03 PRICES QUOTED:** Deduct trade discounts, and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption number for EIN is 59-6000319, and State Sales tax exemption number is 85-8013875578C-1.
- 3.05 WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in the bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in the bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.
- 3.07 MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet or exceed these items, and feels that the technical specifications are overly restrictive, the bidder must notify the Procurement Services Division immediately. Such notification must be received by the Procurement Services Division prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle the bidder to any relief from the conditions imposed in the contract.
- 3.09 SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.
- 3.12 USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Procurement Director reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond or cashiers check. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 PUBLIC RECORDS/TRADE SECRETS/COPYRIGHT:** The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes.

Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the proposer agrees to defend, indemnify, and hold

harmless the city and the city's officers, employees, and agent, against any loss or damages incurred by any person or entity as a result of the city's treatment of records as public records. Proposals purporting to be subject to copyright protection in full or in part will be rejected.

EXCEPT FOR CLEARLY MARKED PORTIONS THAT ARE BONA FIDE TRADE SECRETS PURSUANT TO FLORIDA LAW, DO NOT MARK YOUR RESPONSE TO THE RFP AS PROPRIETARY OR CONFIDENTIAL. DO NOT MARK YOUR RESPONSE TO THE RFP OR ANY PART THEREOF AS COPYRIGHTED.

3.16 PROHIBITION OF INTEREST: No contract will be awarded to a bidding firm who has City elected officials, officers or employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.

3.17 RESERVATIONS FOR AWARD AND REJECTION OF BIDS: The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.

If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, at the sole option of the City.

3.18 LEGAL REQUIREMENTS: Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.

3.19 BID PROTEST PROCEDURE: ANY PROPOSER OR BIDDER WHO IS NOT RECOMMENDED FOR AWARD OF A CONTRACT AND WHO ALLEGES A FAILURE BY THE CITY TO FOLLOW THE CITY'S PROCUREMENT ORDINANCE OR ANY APPLICABLE LAW MAY PROTEST TO THE DIRECTOR OF PROCUREMENT SERVICES DIVISION (DIRECTOR), BY DELIVERING A LETTER OF PROTEST TO THE DIRECTOR WITHIN FIVE (5) DAYS AFTER A NOTICE OF INTENT TO AWARD IS POSTED ON THE CITY'S WEB SITE AT THE FOLLOWING LINK: http://www.fortlauderdale.gov/purchasing/notices_of_intent.htm

THE COMPLETE PROTEST ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK: <http://www.fortlauderdale.gov/purchasing/protestordinance.pdf>

PART IV BONDS AND INSURANCE

4.01 PERFORMANCE BOND: If a performance bond is required in Special Conditions, the Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Performance Bond, payable to the City of Fort Lauderdale, Florida, in the face amount specified in Special Conditions as surety for faithful performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Performance Bond. The Performance Bond must be executed by a surety company of recognized standing, authorized to do business in the State of Florida and having a resident agent.

Acknowledgement and agreement is given by both parties that the amount herein set for the Performance Bond is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

4.02 INSURANCE: If the Contractor is required to go on to City property to perform work or services as a result of ITB award, the Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

The Contractor shall provide to the Procurement Services Division original certificates of coverage and receive notification of approval of those certificates by the City's Risk Manager prior to engaging in any activities under this contract. The Contractor's insurance is subject to the approval of the City's Risk Manager. The certificates must list the City as an ADDITIONAL INSURED for General Liability Insurance, and shall have no less than thirty (30) days written notice of cancellation or material change. Further modification of the insurance requirements may be made at the sole discretion of the City's Risk Manager if circumstances change or adequate protection of the City is not presented. Bidder, by submitting the bid, agrees to abide by such modifications.

PART V PURCHASE ORDER AND CONTRACT TERMS:

5.01 COMPLIANCE TO SPECIFICATIONS, LATE DELIVERIES/PENALTIES: Items offered may be tested for compliance to bid specifications. Items delivered which do not conform to bid specifications may be rejected and returned at Contractor's expense. Any violation resulting in contract termination for cause or delivery of items not conforming to specifications, or late delivery may also result in:

- Bidders name being removed from the City's bidder's mailing list for a specified period and Bidder will not be recommended for any award during that period.
- All City Departments being advised to refrain from doing business with the Bidder.
- All other remedies in law or equity.

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- 5.02 ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.
- 5.03 SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupation Safety and Health Act of 1970 as amended, and be in compliance with Chapter 442, Florida Statutes. Any toxic substance listed in Section 38F-41.03 of the Florida Administrative Code delivered as a result of this order must be accompanied by a completed Material Safety Data Sheet (MSDS).
- 5.04 ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB the bidder will supply only material or equipment that is 100% asbestos free.
- 5.05 OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, the bidder may, if the bidder has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.
- 5.06 VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications which are in writing from an authorized City representative may be considered. Only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, will be recognized by the City as duly authorized expressions on behalf of Contractors.
- 5.07 INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, procurement policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.
- 5.08 INDEMNITY/HOLD HARMLESS AGREEMENT:** The Contractor agrees to protect, defend, indemnify, and hold harmless the City of Fort Lauderdale and its officers, employees and agents from and against any and all losses, penalties, damages, settlements, claims, costs, charges for other expenses, or liabilities of every and any kind including attorneys fees, in connection with or arising directly or indirectly out of the work agreed to or performed by Contractor under the terms of any agreement that may arise due to the bidding process. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable Statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.
- 5.09 TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.
- 5.10 TERMINATION FOR CONVENIENCE:** The City reserves the right, in its best interest as determined by the City, to cancel contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this contract. The Contractor agrees to make available to the City Auditor or designee, during normal business hours and in Broward, Miami-Dade or Palm Beach Counties, all books of account, reports and records relating to this contract should be retained for the duration of the contract and for three years after the final payment under this Agreement, or until all pending audits, investigations or litigation matters relating to the contract are closed, whichever is later.
- 5.13 PERMITS, TAXES, LICENSES:** The successful Contractor shall, at their own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under this contract.
- 5.14 LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.
- 5.15 NON-DISCRIMINATION:** There shall be no discrimination as to race, sex, color, creed, age or national origin in the operations conducted under this contract.
- 5.16 UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party of the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required prior items or services, then the Contractor may request adjustments to the costs to the City to reflect the changed circumstances. The circumstances must be beyond the control of the Contractor, Form G-107 Rev. 10/13

and the requested adjustments must be fully documented. The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, increases are considered to be excessive, or decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the City will reserve the following options:

1. The contract can be canceled by the City upon giving thirty (30) days written notice to the Contractor with no penalty to the City or Contractor. The Contractor shall fill all City requirements submitted to the Contractor until the termination date contained in the notice.
2. The City requires the Contractor to continue to provide the items and services at the firm fixed (non-adjusted) cost until the termination of the contract term then in effect.
3. If the City, in its interest and in its sole opinion, determines that the Contractor in a capricious manner attempted to use this section of the contract to relieve themselves of a legitimate obligation under the contract, and no unusual circumstances had occurred, the City reserves the right to take any and all action under law or equity. Such action shall include, but not be limited to, declaring the Contractor in default and disqualifying him for receiving any business from the City for a stated period of time.

If the City does agree to adjusted costs, these adjusted costs shall not be invoiced to the City until the Contractor receives notice in writing signed by a person authorized to bind the City in such matters.

- 5.17 ELIGIBILITY:** If applicable, the Contractor must first register with the Department of State of the State of Florida, in accordance with Florida State Statutes, prior to entering into a contract with the City.
- 5.18 PATENTS AND ROYALTIES:** The Contractor, without exception, shall indemnify and save harmless the City and its employees from liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including its use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.
- 5.19 ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Commission or the City Manager or City Manager's designee, depending on original award approval.
- 5.20 LITIGATION VENUE:** The parties waive the privilege of venue and agree that all litigation between them in the state courts shall take place in Broward County, Florida and that all litigation between them in the federal courts shall take place in the Southern District in and for the State of Florida.
- 5.21 LOCATION OF UNDERGROUND FACILITIES:** If the Contractor, for the purpose of responding to this solicitation, requests the location of underground facilities through the Sunshine State One-Call of Florida, Inc. notification system or through any person or entity providing a facility locating service, and underground facilities are marked with paint, stakes or other markings within the City pursuant to such a request, then the Contractor, shall be deemed non-responsive to this solicitation in accordance with Section 2-184(5) of the City of Fort Lauderdale Code of Ordinances.
- 5.22 PUBLIC AGENCY CONTRACTS FOR SERVICES:** if applicable, for each public agency contract for services, Contractor is required to comply with F.S. 119.0701, which includes the following:
- a) Keep and maintain public records that ordinarily and necessarily would be required by the public agency in order to perform the service.
 - (b) Provide the public with access to public records on the same terms and conditions that the public agency would provide the records and at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
 - (c) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.
 - (d) Meet all requirements for retaining public records and transfer, at no cost, to the public agency, all public records in possession of the contractor upon termination of the contract and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the public agency in a format that is compatible with the information technology systems of the public agency.

NON-COLLUSION STATEMENT:

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME**RELATIONSHIPS**

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local BUSINESS preference classification as indicated herein, and further certifies and agrees that it will re-affirm it's local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

- (1) _____ is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the City of Fort Lauderdale current year Business Tax Receipt and a complete list of full-time employees and their addresses shall be provided within 10 calendar days of a formal request by the City.
Business Name
- (2) _____ is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Business Tax Receipt or a complete list of full-time employees and their addresses shall be provided within 10 calendar days of a formal request by the City.
Business Name
- (3) _____ is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.
Business Name
- (4) _____ requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
Business Name
- (5) _____ requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
Business Name
- (6) _____ is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-12-04, Sec.2-199.2. and does not qualify for Local Preference consideration.
Business Name

BIDDER'S COMPANY: _____

AUTHORIZED COMPANY PERSON: _____
NAME SIGNATURE DATE

BID/PROPOSAL SIGNATURE PAGE

How to submit bids/proposals: Proposals must be submitted by hard copy only. It will be the sole responsibility of the Bidder to ensure that the bid reaches the City of Fort Lauderdale, City Hall, Procurement Services Division, Suite 619, 100 N. Andrews Avenue, Fort Lauderdale, FL 33301, prior to the bid opening date and time listed. Bids/proposals submitted by fax or email will NOT be accepted.

The below signed hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the CITY and such acceptance covers all terms, conditions, and specifications of this bid/proposal.

Please Note: All fields below **must** be completed. If the field does not apply to you, please note N/A in that field.

Submitted by: _____
(signature) (date)

Name (printed) _____ Title: _____

Company: (Legal Registration) _____

CONTRACTOR, IF FOREIGN CORPORATION, MAY BE REQUIRED TO OBTAIN A CERTIFICATE OF AUTHORITY FROM THE DEPARTMENT OF STATE, IN ACCORDANCE WITH FLORIDA STATUTE §607.1501 (visit <http://www.dos.state.fl.us/>).

Address: _____

City _____ State: _____ Zip _____

Telephone No. _____ FAX No. _____ Email: _____

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): _____

Payment Terms (section 1.04): _____ Total Bid Discount (section 1.05): _____

Does your firm qualify for MBE or WBE status (section 1.09): MBE _____ WBE _____

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

Addendum No.

Date Issued

P-CARDS: Will your firm accept the City's Credit Card as payment for goods/services?

YES _____ **NO** _____

VARIANCES: State any variations to specifications, terms and conditions in the space provided below or reference in the space provided below all variances contained on other pages of bid, attachments or bid pages. No variations or exceptions by the Proposer will be deemed to be part of the bid submitted unless such variation or exception is listed and contained within the bid documents and referenced in the space provided below. If no statement is contained in the below space, it is hereby implied that your bid/proposal complies with the full scope of this solicitation. **HAVE YOU STATED ANY VARIANCES OR EXCEPTIONS BELOW? BIDDER MUST CLICK THE EXCEPTION LINK IF ANY VARIATION OR EXCEPTION IS TAKEN TO THE SPECIFICATIONS, TERMS AND CONDITIONS.** If this section does not apply to your bid, simply mark N/A in the section below.

Variances:

**RFP PRE-PROPOSAL MEETING
ATTENDANCE SIGN-IN FORM**

DATE: March 14, 2014

TIME: 2:00 pm

RFP #: 744-11384

OPENING DATE: March 31, 2014

RFP TITLE: Enterprise Content Management System (ECMS) and Professional Services

PROCUREMENT CONTACT: Richard Ewell

NAME	COMPANY	PHONE	EMAIL
MATTHEW SCOTT	CRM	786.245.9188	msscott@grmdocument.com
BREARDA LIENDO	CDI	713.591.3458	BLIENDO@CDIAC.COM
LEONARDO CRANE	CDI	954.639.8894	LCRANE@CDIAC.COM
Anthony J. Mann	ABS	954-258-1979	ajmann@ABV-Data.com
Jonathan Bennett	SI	954 462 5400	jbennett@5i.Solutionsinc.com
Jeff Polka	MTS	954-978-9900	jpolka@mts-software.net
G.W. Gilbert	Results Eng	954 923-5000	George.Gilbert@Results.com
Mark Wheelock	MTS	954 954-561-3500	mwheelock@mts-software.net
George Bushak	BackBone	954-881-0061	GEORGE@BACKBONE.CC

**RFP PRE-PROPOSAL MEETING
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DATE: March 14, 2014

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RFP TITLE: Enterprise Content Management System (ECMS) and Professional Services

PROCUREMENT CONTACT: Richard Ewell

NAME	COMPANY	PHONE	EMAIL
Dave Mullin	Recorded It Inc	(844) 544-8889	David.Nichols@RecordedIt.com
Alexis Narayao	CompSMT4 Inter	(381) 293-1333	Alexis.Narayao@CDLinc.com
William Diers	Trusteas	(615) 345-6607	Boulevard@Trusteas.com
Dans Rakelings	Educ Systems Inc.	(301) 378-6217	D.Rakelings@educsystems.com
Jeremy Munich	Knowledge Lake	(401) 496-3715	Jeremy.Munich@knowledgelake.com
Bonnie Farkas	IQ Business Group	(504) 514-2046	Bonnie.Farkas@IQBGInc.com
Michael Wilkerson	Optext	(919) 630-8056	MWilkerson@optext.com
Amanda Bush	ImageSoft	(919) 462-8505	AmandaB@ImageSoft.com
Jessie Tensson	Carphsoft Tech	(703) 871-8639	Jessie.Tensson@carphsoft.com
Crestge Gilbert	Results Engineering	(954) 937-5800	Crestge.Gilbert@ResultsEng.com

**RFP PRE-PROPOSAL MEETING
ATTENDANCE SIGN-IN FORM**

DATE: March 14, 2014

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PROCUREMENT CONTACT: Richard Ewell

NAME	COMPANY	PHONE	EMAIL
Logan D. Lello	MCCI	(555) 408-5433	Logan@mccinnovations.com
Glenn Walther	Databank	(866) 343-7462	glennwalther@databank.com
Sam Schulte	Unstoppable Software	(513) 383-5499	sschulte@unstoppablesoftware.com
Bob Boykins	Discrete Access Systems	(804) 844-7600	Bob@discreteaccess.net

Question and Answers for Bid #744 - 11384 - Enterprise Content Management System (ECMS) and Professional Services

OVERALL BID QUESTIONS
<p>Question 1</p> <p>1. Does the software Granicus Legistar Agenda Management SunGard's OneSolution backend database, have an Open Database Connectivity Driver available? (Submitted: Mar 10, 2014 1:16:35 PM EDT)</p> <p>Answer</p> <p>- Both system are Open source architecture, these system are hosted offsite. There is not an ODBC Driver configuration to access these data sources, an API or Web service would be required. (Answered: Mar 11, 2014 8:15:08 AM EDT)</p>
<p>Question 2</p> <p>2. Part V Technical Specifications/Scope of Services 02. ? Are the 296,300 images in the current City EDM system tiff images? In not, what format? How Many fields of metadata are there? (Submitted: Mar 10, 2014 1:16:53 PM EDT)</p> <p>Answer</p> <p>- For the Department of Sustainable Development and the 293,600 Images there are two Subsets of Images, one for microfilm which was converted to and paper scanned images, they are all Tiff Images and the metadata for each is:</p> <p>Building Plans and Permits</p> <p>Folder Indexes:</p> <p>BLD_Agency - 25, char (Building Permits)</p> <p>Permit Number - 10, char</p> <p>Permit Type - 10 char</p> <p>Property Address -50, char</p> <p>Folio Number -30, char</p> <p>Exempt Property -10, char</p> <p>Document Level Indexes:</p> <p>Permit Doc Class -25, char</p> <p>Permit _Doc_Type40</p> <p>Microfilm</p> <p>Folder Level Indexes</p> <p>BLD_Agency - 25, char (Building Permits)</p> <p>Folio Number - 30, char</p> <p>Exempt Property -10, char</p> <p>Property Address -50, char</p> <p>Document level Indexes</p> <p>Permit Doc Class -25, char</p> <p>Permit _Doc_Type40</p> <p>In addition to the above there are other 'system' fields such as date created, time created, created by , which were auto populated And others most are null such as subject, comments, Author, Keywords, Name and Title (Answered: Mar 11, 2014 8:13:58 AM EDT)</p>
<p>Question 3</p> <p>3. Part V Technical Specifications/Scope of Services 02. ? Images and metadata from other departments, are these also tiff images? In not, what format? How Many fields of metadata are there? (Submitted: Mar 10, 2014 1:17:12 PM EDT)</p> <p>Answer</p> <p>- For other departments there may be supporting materials, documents in their native format, such a Word, Excel, and possibly others especially in the Job Applications Folder for HR, which is no longer being used for new applications. The HR department now uses NeoGov. The metadata, number of fields and configuration was provided in a previous question for the Department of Sustainable Development. Additional time would be needed to outline this for each record set, and can be provided at a later date. (Answered: Mar 11, 2014 8:57:34 AM EDT)</p>
<p>Question 4</p> <p>4. 3.4 Maintenance and Support 04. - How are redactions/markups/annotations handled in the current system? Are they overlays or burned in? Will it be necessary to retain a separate original of the document to be viewable by others? (Submitted: Mar 10, 2014 1:17:24 PM EDT)</p> <p>Answer</p> <p>- Redaction in the current system uses overlays using Spicer Imagination access controlled by group or user permissions. The majority of the redaction feature was used by HR for routing of Job Applications. There is no redaction used for the images for the Department of Sustainable Development. There may be a need to redact existing images in a new solution for future records requests, etc. The original document would need to be retained by the City if it meets the appropriate records keeping requirements. (Answered: Mar 11, 2014 8:27:10 AM EDT)</p>
<p>Question 5</p> <p>5. 3.4 Maintenance and Support 04. - Unlimited Public Access to web searches/Read Only. Are these for all records or a specific subset (that may or may not contain redacted images) (Submitted: Mar 10, 2014 1:17:40 PM EDT)</p> <p>Answer</p> <p>- These would be for a specified subset (Permits, Plans, Agenda, and Agenda Items etc.) They may contain some redacted images. (Answered: Mar 10, 2014 1:32:54 PM EDT)</p>
<p>Question 6</p> <p>6. 3.4 Maintenance and Support 04. - Maintain records in the format accepted by the Rules of the State of Florida, Tiff Specification 6.0 or PDF/A ? Will you allow native files or will everything need to be converted to tiff or pdf? (Submitted: Mar 10, 2014 1:17:55 PM EDT)</p> <p>Answer</p> <p>- All final records should be converted to tiff or pdf/A (Answered: Mar 10, 2014 1:32:04 PM EDT)</p>
<p>Question 7</p> <p>Have you seen demo's or worked recently with ECM vendors? (Submitted: Mar 11, 2014 12:44:22 PM EDT)</p> <p>Answer</p> <p>- Yes, several years ago. (Answered: Mar 12, 2014 8:02:54 AM EDT)</p>
<p>Question 8</p> <p>Data Migration Questions:</p> <ol style="list-style-type: none"> 1. What is the name of the legacy system (vendor and product name) and the version? 2. What database does the legacy system use? What version? 3. Does the legacy system have an SDK/API available? Does the client have a license for it? 4. Where are documents/images stored? File system? SAN? BLOB in database? 5. How many documents/pages are in the system? a. How many documents? b. How many pages? Or at least the average number of pages per document? c. How much disk space is being utilized by the documents? Or is the average file size of the documents known? 6. How many document classes/types are in the system? If the system does not have Document classes, please provide the number of SharePoint Document Libraries/Content Types the documents will be mapped to. 7. Are versions utilized? a. How many versions exist? b. Are all versions considered ?on line?? Are they assessable? c. Will versions be used going forward? d. Do versions need to be migrated to SharePoint? 8. Is a foldering schema used in the legacy system? a. Is the foldering a business requirement going forward? b. What is the business reason for the folders? Searching? Security? c. Are documents filed in multiple folders? 9. What types of documents are stored in the repository? a. Single or Mult - Page TIFF? PDF? Office Documents? Emails? Other? b. Are there any proprietary documents formats? c. Are there any searchable PDFs? If so, are searchable PDFs a requirement going forward? 10. Security a. How is security handled? b. Do any documents have document level security? 11. Annotations a. Are annotations utilized? b. If so, do annotations need to be migrated to SharePoint? 12. Are there any compound documents? 13. Are there any multi-value fields? 14. How are documents added to the repository? 15. Is workflow used? a. What workflow software is used (vendor, project and version)? (Submitted: Mar 12, 2014 9:20:40 AM EDT) <p>Answer</p> <ol style="list-style-type: none"> 1. This is specified in the RFP - emPower 360 v4.0, currently owned by OpenText Formerly Global360, Formerly eStream, originally Identitech, Inc. FYI. 2. MS SQL Server 2005 3. We may have an older version of the API, but all files and metadata can be exported to MSB files, or Tagged Tiff Images. 4. On SANS Disk Array 5. The number of documents for the Department of Sustainable Development are 293, 300 documents/images contained within 205, 142 folders. This is located in the RFP Part V. a. See part VI section 02. Of RFP b. The number of pages varies, estimating 3 - 7 pages for the majority of DSD images. c. See RFP Part V. Section 02. 6. For the Department of Sustainable Development there are currently 2 Document classes per the functionality of this system that are being used, And another that is configured but has not been used. Total of Three. Our current system does not utilize SharePoint. 7. For the Department of Sustainable Development one major version of each document exists. a. See above b. All versions are online, none for DSD. c. Yes versioning will be used in the future. d. We do not use SharePoint nor does the RFP state this is a requirement. 8. Yes in the current system, all documents added are added to a folder class. a. Hopefully some organized structure is used in a new system. We will evaluate all proposed systems. b. Our current system uses Folder classes, for documents, this is the current functionality of the system. c. NO documents are located in one folder class. 9a. Single Page, Multipage TIF, PDF, Some Word, Excel and possibly others. b. There could be, also stored are video files (City Commission Meeting Videos) 10a. Group Security by Search class b. yes some documents can be filtered out by the search class security and groups 11. Annotations/Redaction -, currently used only in the HR subset of Records, not used for those images for the Department of Sustainable Development currently. Possibly future use for DSD. 12. We do not use SharePoint currently nor was this a requirement in the RFP. 13. Currently there are no compound documents stored. 14. Through the functionality of the currently application, scan, Browse to add document. 15. We had four different workflows in production at one point, since been replaced with others system (NeoGov, Legistar) But there will be a need for workflows as per the RFP. 13. The Workflow module is part of the current system (which consisted of Workflow, Electronic forms, etc.) (Answered: Mar 13, 2014 9:03:39 AM EDT)
<p>Question 9</p> <p>Please clarify that the RFP requires migration and ECMS taxonomy configuration only for the following departments. If additional departments should be included, please identify the department, associated documents, and document counts.</p> <ol style="list-style-type: none"> i. Department of Sustainable Development ii. Human Resources iii. Fire Rescue Department iv. City Clerk's Office <p>Please clarify that the RFP requires ECMS user licensing only for the Department of Sustainable Development and not for the other migrated departments listed above. (Submitted: Mar 12, 2014 9:34:37 AM EDT)</p> <p>Answer</p> <p>- Correct, as defined in the RFP, for the initial scope of work/task, we are requesting licensing for 250 users the Department of Sustainable Development. We are also requiring a complete product price list and licensing and maintenance to be included as part of your response as requested within. (Answered: Mar 12, 2014 12:59:16 PM EDT)</p>
<p>Question 10</p> <p>SharePoint</p> <ol style="list-style-type: none"> a. Is it currently deployed? b. How is it used (Intranet, Collaboration Portal, etc.)? c. Version?

d. Number of WFES? e. Topology and Taxonomy? (Submitted: Mar 12, 2014 9:34:57 AM EDT)
Answer - SharePoint a. Is it currently deployed? Not deployed City Wide, Limited version used by IT staff only b. How is it used (Intranet, Collaboration Portal, etc.)? Collaboration Portal c. Version? SharePoint 2010 Foundation d. Number of WFES? e. Topology and Taxonomy? (Submitted: Mar 12, 2014 9:34:57 AM EDT) (Answered: Mar 13, 2014 10:09:49 AM EDT)
Question 11 Infrastructure, HA/DR a. Please describe in more detail your high availability or disaster recovery requirements? b. Do you require Development, Test, and/or QA environments in addition to your production environment? c. If so, which environments? d. Please confirm, whether the responding vendor procures and implements the required hardware like specified scanners, servers? e. Please provide additional details on ECMS system interface requirements for the following applications? i. SunGard OneSolution (Community Development Module) ii. Kronos Timekeeping Module iii. Granicus Legistar/Insite (Submitted: Mar 12, 2014 9:35:23 AM EDT)
Answer - a. are in the process of constructing a second data center and we are migrating our core applications over this year and will continue to migrate more applications for redundancy as funds become available. We will need to configure redundancy in the future b. Yes the ability for a second instance, Test Database is preferred. c. No per the RFP the vendor should recommend the Server Application Hardware, The city will Purchase Hardware. The Hardware will be put in place at the City by City Staff. d. There is a desire to capture the final images/Document s produced in these system and sent to the new ECMS for archival, search and retrieval purposes. i. SunGard OneSolution (Community Development Module) Archival Purposes ii. Kronos Timekeeping Module - there is currently no interface need identified for this application iii. Granicus Legistar/Insite Archival Purposes and we desire the functionality of image enabling from a new ERP system to associated images in the future, once an ERP system solution is selected. (Answered: Mar 13, 2014 1:20:02 PM EDT)
Question 12 Information Management DoD 5015.2 is a federal compliance regulation that is not mandatory for state and local governments. i. Do you fully require DoD 5015.2 compliance for all 168 identified requirements or only specific aspects of the regulation? ii. Do you currently have a compliance officer who maintains or will maintain DoD 5015.2 status? iii. DoD 5015.2 certified solutions must be able to create custom hierarchical types, as well as custom peer-to-peer relationships types that can be applied to two or more records across the repository. Do you require the ability to associate one record with another through records relationships? iv. DoD 5015.2 certified solutions must provide metadata based Item-level security identified as Supplemental Markings and Access Control Columns. Do you require the ability to leverage Supplemental Markings or Access Control Columns? b. Do you currently have a designated Retention Schedule or File Plan? c. How long are files retained? d. To what compliance regulations are you subject? (Submitted: Mar 12, 2014 9:36:06 AM EDT)
Answer - DoD 5015.2 is a federal compliance regulation that is not mandatory for state and local governments. i. Do you fully require DoD 5015.2 compliance for all 168 identified requirements or only specific aspects of the regulation? This will be determined when the Records Management module is implemented ii. Do you currently have a compliance officer who maintains or will maintain DoD 5015.2 status? Not at this time. Our City Clerk is the official Records Custodian for the City iii. DoD 5015.2 certified solutions must be able to create custom hierarchical types, as well as custom peer-to-peer relationships types that can be applied to two or more records across the repository. Do you require the ability to associate one record with another through records relationships? Not a current but future need. iv. DoD 5015.2 certified solutions must provide metadata based Item-level security identified as Supplemental Markings and Access Control Columns. Do you require the ability to leverage Supplemental Markings or Access Control Columns? Not at this time, possibly in the future b. Do you currently have a designated Retention Schedule or File Plan? Not an electronically file plan, only hard copy c. How long are files retained? The City uses the Schedules from the State of Florida in conseration with internal schedules as well. http://dlis.dos.state.fl.us/recordsmgmt/gen_records_schedules.cfm d. To what compliance regulations are you subject? (Submitted: Mar 12, 2014 9:36:06 AM EDT) http://dlis.dos.state.fl.us/barm/handbooks/electronic.pdf , http://dlis.dos.state.fl.us/recordsmgmt/statutes.cfm , http://www.leg.state.fl.us/Statutes/index.cfm?App_mode=Display_Statute&URL=0600-0699/0668/0668.html (Answered: Mar 13, 2014 10:08:47 AM EDT)
Question 13 Can we assume the use of MS Office? a. If so, what version? How many employees will need the ability index and upload to the document repository directly from Outlook? (Submitted: Mar 12, 2014 9:36:44 AM EDT)
Answer - Uploading from Outlook was not a requirement. (Answered: Mar 12, 2014 1:00:29 PM EDT)
Question 14 Workflow and Forms a. Expected number of workflow transactions per day. b. Expected approval steps and process (a Visio diagram is preferred)? c. Will document centric workflows require interfacing with other line of business systems (SunGard OneSolution, etc.)? d. What types of electronic forms will be required and what are the purposes of the forms (examples of forms will be helpful)? i. Should forms be made available for mobile devices? (Submitted: Mar 12, 2014 9:37:07 AM EDT)
Answer - a. Currently not identified, future need. Pricing requested b. Currently not identified, future need. c. Currently not identified possible future need, possible image enabling from other systems. d. Currently not identified future need i. This is a possibility, as would be for workflow approvals. (Answered: Mar 13, 2014 9:07:14 AM EDT)
Question 15 Capture a. Based on the RFP, can we assume the approximate number of backfile documents that require OCR to 310,000? b. Document Types that require OCR (permits, personnel files, fire training records, agendas, etc.)? c. Do you currently have dedicated scanners in place? i. If so, how many? ii. How many dedicated scanning stations do you envision? iii. Will Individuals who perform scanning also index the content or will this be a separate function? 1. If so, how many dedicated indexing stations do you envision? d. Will all scanning be done at a central location or will there be distributed remote scanning offices? e. Do you currently have Multi-Function Peripherals (MFP) in place? i. If so, how many? ii. Do the MFPs scan to network or individual's email? f. Do you wish to have the vendor provide data storage and image capture document scanners as part of the bid response? g. Please describe in more detail your requirements for field level or word level redaction? h. Do you currently have fax servers in place and if so, which fax server software do you use? (Submitted: Mar 12, 2014 9:37:50 AM EDT)
Answer - a. Based on the RFP, can we assume the approximate number of backfile documents that require OCR to 310,000? Unknown to be determined. b. Document Types that require OCR (permits, personnel files, fire training records, agendas, etc.)? For DSD, Possibly associated documents for Permits, Plans etc. To be determined. c. Do you currently have dedicated scanners in place? DSD has 9 MFD scanners, desktop/ just in time scanners and possibly (2) large format scanners will be needed, to be determined in scope i. If so, how many? See Above ii. How many dedicated scanning stations do you envision? To Be determined iii. Will Individuals who perform scanning also index the content or will this be a separate function - Most likely the same person who is scanning, to be determined 1. If so, how many dedicated indexing stations do you envision? Should be the same for the number of scanners, to be determined d. Will all scanning be done at a central location or will there be distributed remote scanning offices? Distributed e. Do you currently have Multi-Function Peripherals (MFP) in place? Yes i. If so, how many? 9 at DSD ii. Do the MFPs scan to network or individual's email? Depends on the machine make/model/location. The Toshiba's will do both. Xerox and Konica Minolta only to email f. Do you wish to have the vendor provide data storage and image capture document scanners as part of the bid response? Data Storage not a requirement, Scanners HW should be recommended as requested in the RFP. g. Please describe in more detail your requirements for field level or word level redaction? We do not foresee use for redaction at DSD, but to be determined during scope task development h. Do you currently have fax servers in place and if so, which fax server software do you use? (Submitted: Mar 12, 2014 9:37:50 AM EDT) The city uses G FAX (Answered: Mar 14, 2014 9:45:20 AM EDT)
Question 16 Electronic Signatures a. Will electronic signature capabilities only be required for internal employees or do you wish to make e-signing capabilities available for public use? i. Please provide an approximate number of electronic signature licenses required. (Submitted: Mar 12, 2014 9:38:10 AM EDT)
Answer - a. Will electronic signature capabilities only be required for internal employees or do you wish to make e-signing capabilities available for public use? Internal of Course, Electronic Signatures for outside public use would be desired as well for future use. i. Please provide an approximate number of electronic signature licenses required. (Submitted: Mar 12, 2014 9:38:10 AM EDT) Unknown at this time, please provide license, structure and cost in your complete product price list. (Answered: Mar 13, 2014 1:52:47 PM EDT)
Question 17 Content & Volumes a. What is the number of different document types? i. Please provide a listing of different document types if possible. b. What is the average number of index fields for the document types? c. Is backfile paper to electronic conversion part of the project? i. If so, what is the approximate number of documents for backfile conversion? d. What is the approximate number of documents to be added to the system each day, month or year? i. Paper approximate? ii. Electronic approximate? (Submitted: Mar 12, 2014 9:38:37 AM EDT)
Answer - a. What is the number of different document types? If the question is understood, for DSD images majority are TIFF files, or PDF i. Please provide a listing of different document types if possible. b. What is the average number of index fields for the document types? Number of and example of Index fields for the DSD images provided in Question 2 on Overall Bid response c. Is backfile paper to electronic conversion part of the project? No this will be a separate RFP to be released after a system after an ECMS system is chosen i. If so, what is the approximate number of documents for backfile conversion? d. What is the approximate number of documents to be added to the system each day, month or year? Information pending i. Paper approximate? Information pending ii. Electronic approximate? (Submitted: Mar 12, 2014 9:38:37 AM EDT) Information pending (Answered: Mar 14, 2014 9:46:48 AM EDT)
Question 18 Please describe your requirements for a mobile application. Does the mobile application require content capture, content search, etc.? (Submitted: Mar 12, 2014 9:38:48 AM EDT)
Answer - Content Search, possible workflow process approvals, none identified for this project currently, future need. (Answered: Mar 13, 2014 9:10:12 AM EDT)
Question 19 How many individuals will require the ability to perform search and retrieval of content in the system? (Submitted: Mar 12, 2014 9:38:58 AM EDT)
Answer - Internally, 250 staff members accessing content for the Department of Sustainable Development., Public, unlimited search and retrieval. (Answered: Mar 13, 2014 9:11:07 AM EDT)
Question 20 How many individuals will require the ability to perform search and retrieval from external line of business systems? (Submitted: Mar 12, 2014 9:39:08 AM EDT)
Answer - We are requesting unlimited public search to all data sets, that are made accessible to the public. (Answered: Mar 13, 2014 10:04:32 AM EDT)
Question 21 What is the desired time frame the system should be operational after vendor selection? (Submitted: Mar 12, 2014 9:39:19 AM EDT)

<p>Answer</p> <ul style="list-style-type: none"> - As soon As possible. (Answered: Mar 12, 2014 10:26:29 AM EDT) - We would like to implement as soon as possible. (Answered: Mar 13, 2014 10:05:24 AM EDT)
<p>Question 22</p> <p>Will remote access be provided to the systems in key support and implementation processes? (Submitted: Mar 12, 2014 9:39:30 AM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - Please clarify your question. (Answered: Mar 13, 2014 10:06:36 AM EDT)
<p>Question 23</p> <p>Training</p> <p>a. Number of Individuals requiring Administrator Training of the system?</p> <p>b. Number of Individuals requiring End User Training of the system? (Submitted: Mar 12, 2014 9:39:44 AM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - We are utilizing the number contained in Part VIII Onsite, E.1 Training Costs: our training room will accommodate (14) seats. Please use this quantity for end users for the Initial scope of work, and (4) for administrator training. Please indicate whether there is a limit to the number of students in a class room / per Training instructor. (Answered: Mar 13, 2014 10:07:36 AM EDT)
<p>Question 24</p> <p>Was a third party vendor used to assist in business analysis and/or write the RFP? If so, are you able to provide the name of the vendor, and are they eligible to respond to this RFP? (Submitted: Mar 12, 2014 9:39:57 AM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - No, this RFP prepared In House (Answered: Mar 12, 2014 10:23:56 AM EDT)
<p>Question 25</p> <p>Was a third party vendor used to assist in business analysis and/or write the RFP? If so, are you able to provide the name of the vendor, and are they eligible to respond to this RFP? (Submitted: Mar 12, 2014 9:39:57 AM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - No, this RFP prepared In House (Answered: Mar 12, 2014 10:23:56 AM EDT)
<p>Question 26</p> <p>Can you please provide the Phone Conference details for the Pre-Proposal Conference Meeting scheduled for March 14, at 2:00 p.m.? (Submitted: Mar 13, 2014 8:56:48 AM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - Conference Bridge Information: Date: 14 Mar, 2014 Start Time: 02:00 PM Conference Bridge Telephone Number: 954-828-7451 Meeting ID: 1112 (Answered: Mar 13, 2014 8:58:13 AM EDT)
<p>Question 27</p> <p>In the meeting on Friday, the impression was received that because the current system is a web access system, that the City would prefer this option over a desktop solution. Is the City willing to deploy a desktop-based solution (thick install) to its users, or purely looking for a thin web client? (Submitted: Mar 17, 2014 10:31:08 AM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - The current system has both, an install and web client. Most users use the Web Client. The City is not opposed to deploying desktop-based solution where needed. However the City would prefer light client access where possible, such as search and retrieval. (Answered: Mar 17, 2014 11:32:41 AM EDT)
<p>Question 28</p> <p>General Questions</p> <ol style="list-style-type: none"> 1. I understand that the number of dedicated scanning stations is to be determined. So that we can appropriate the correct scanning and capture licenses for the Department of Sustainable Development project, how many scanning licenses are required? 2. Since there is no workflow processes currently identified for the initial implementation of the Department of Sustainable Development, do workflow client licenses need to be included for the Department of Sustainable Development or listed in the complete product price list and licensing and maintenance? <p>Conversion Questions</p> <ol style="list-style-type: none"> 1. Database Platform (Microsoft SQL Server, Oracle, Proprietary, etc.)? 2. What version of the database is currently being used? 3. Operating System running the database server? 4. Can the database be restored and accessed without installing the application? 5. Does a test system/database exist? 6. Does the application use the same physical database for all documents or are there different physical databases for different document criteria? 7. Average number of indexes per document type? 8. Can a single document have more than one file format? 9. Are images stored as Single Page TIF files or Multipage TIF files? 10. Does the application create any type of notes? If so, are the notes stored in the database or as a file on the file system? 11. Can the documents be annotated (e.g. highlights, markups, redactions)? If so, are the annotations stored in the database? 12. Does the application store document history? (Submitted: Mar 18, 2014 1:58:49 PM EDT) <p>Answer</p> <ul style="list-style-type: none"> - 1. I understand that the number of dedicated scanning stations is to be determined. So that we can appropriate the correct scanning and capture licenses for the Department of Sustainable Development project, how many scanning licenses are required? Answer: If your cost (PART VIII Cost Proposal, Section 1. . . A. 250 FULL User Licenses) does not include scanning functionality in a "full" user license, include any additional cost that the City would incur to achieve full capability". Please price scanning licenses for 250, for consistency purposes. 2. Since there is no workflow processes currently identified for the initial implementation of the Department of Sustainable Development, do workflow client licenses need to be included for the Department of Sustainable Development or listed in the complete product price list and licensing and maintenance? See response to #1 above. (Answered: Mar 18, 2014 3:33:16 PM EDT) <p>Conversion Questions</p> <ol style="list-style-type: none"> 1. Database Platform (Microsoft SQL Server, Oracle, Proprietary, etc.)? Answer: MS SQL Server 2005 2. What version of the database is currently being used? Answer: MS SQL Server 2005 3. Operating System running the database server? Answer: MS Windows Server 2003 Enterprise Edition sp2 4. Can the database be restored and accessed without installing the application? Answer: Yes, the data could be accessed via SQL, cannot retrieve objects without the application however, the images and metadata can be exported to MSB/Tagged Tif images. There are two databases, one for the metadata, user created and system tables/fields and a second database containing the pointers (Object ID's) to the objects/images. Including Object Routes, Volumes etc. 5. Does a test system/database exist? Answer: VM Environment, need to confirm that it still exists 6. Does the application use the same physical database for all documents or are there different physical databases for different document criteria? Answer: Images/Documents are stored on a separate physical server from the database server and different volumes are configured for each document set (HR, Clerk, Fire, DSD, etc.) 7. Average number of indexes per document type? Answer: For the DSD, as answered in Overall bid question #2: <p>Building Plans and Permits</p> <p>Folder Indexes:</p> <p>BLD_Agency -25, char (Building Permits)</p> <p>Permit Number -10, char</p> <p>Permit Type -10 char</p> <p>Property Address -50, char</p> <p>Folio Number -30, char</p> <p>Exempt Property -10, char</p> <p>Document Level Indexes:</p> <p>Permit Doc Class -25, char</p> <p>Permit _Doc_Type40</p> <p>Microfilm</p> <p>Folder Level Indexes</p> <p>BLD_Agency -25, char (Building Permits)</p> <p>Folio Number -30, char</p> <p>Exempt Property -10, char</p> <p>Property Address -50, char</p> <p>Document level Indexes</p> <p>Permit Doc Class -25, char</p> <p>Permit _Doc_Type40</p> <p>--- In addition to the above there are other 'system' fields such as date created, time created, created by , which were auto populated And others most are null such as subject, comments, Author, Keywords, Name and Title. NOTE: Each subset , Clerk records, Fire Training Records, HR have their own unique set of indexes.</p> <ol style="list-style-type: none"> 8. Can a single document have more than one file format? Answer: Yes in some instances, not for DSD images. 9. Are images stored as Single Page TIF files or Multipage TIF files? Answer: For DSD images are Multipage Tif and single page documents are single page TIF 10. Does the application create any type of notes? If so, are the notes stored in the database or as a file on the file system? Answer: There are notes fields at the Folder/Document level (Indexes) which are stored in the database. Annotations are layers on the object/image 11. Can the documents be annotated (e.g. highlights, markups, redactions)? If so, are the annotations stored in the database? Answer: On the object 12. Does the application store document history? Answer: Yes (Answered: Mar 18, 2014 3:33:49 PM EDT)
<p>Question 29</p> <p>The RFP states that the RFP response should be laid out under various tabs, but Tab 2: Cost Proposal Page and Tab 10: Response Part VIII ? City's Cost Proposal page. Do you want the Cost Proposal Page under both Tabs? If not, which Tab should be used to place the Cost Proposal Page? (Submitted: Mar 18, 2014 3:00:39 PM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - Please put the Cost Proposal Page under Tab 2. (Answered: Mar 18, 2014 3:02:25 PM EDT)
<p>Question 30</p> <ol style="list-style-type: none"> 1. Could you please provide the name of the companies that attended (in person or by phone) the Pre-bid Conference? 2. Do you want a solution installed on premises? yes or no 3. Do you want a Cloud Computing Hosted solution? yes / no / something to be considered. (Submitted: Mar 18, 2014 4:51:53 PM EDT)
<p>Answer</p> <ul style="list-style-type: none"> - 1. Could you please provide the name of the companies that attended (in person or by phone) the Pre-bid Conference? Attached to RFP 2. Do you want a solution installed on premises? yes or no Answer: The city may consider a hosted solution, or a combination of both, but desires an on premise. If hosted solution is offered please prepare an Addendum to your proposal as an alternate solution 3. Do you want a Cloud Computing Hosted solution? yes / no / something to be considered. Answer: Something to be considered. (Answered: Mar 20, 2014 7:45:10 AM EDT)
<p>Question 31</p> <ol style="list-style-type: none"> 1. What's the time -frame to deliver solution: 3 months, 6 months or ? 2. When will the City select the training approach? 3. Are regular communications between the parties required to be face-to-face? 4. Substitution of Personnel: How many days in advance does the City require for notification? 5. What is the city's contingency plan if any delays acquiring/installing new hardware? 6. Is the contractor required to use the City's development environment? (Submitted: Mar 18, 2014 11:43:51 PM EDT)
<p>Answer</p> <ul style="list-style-type: none"> - 1. What's the time -frame to deliver solution: 3 months, 6 months or ? Answer: After final agreement is reached, reviewed and approved by City Attorney's office, Approved by the City Commission at a City Commission meeting, and project plan mutually developed, the City desires the solution to be delivered ASAP and/or as mutually agreed by City and Contractor. 2. When will the City select the training approach? Answer: During final scope and agreement. 3. Are regular communications between the parties required to be face-to-face? Answer: No 4. Substitution of Personnel: How many days in advance does the City require for notification? Answer: The City should be notified by Contractor, reasonably in advance to permit evaluation of proposed personnel and the impact on the project. 5. What is the city's contingency plan if any delays acquiring/installing new hardware? Answer: We don't anticipate delays with any orders from our HW vendors or in-house staff installing the hardware that meets and is compatible with City standards and its environment as would be recommend by the awarded contractor. If a solution is hosted off premise, this not be a concern, and if on premise, the project plan would consider and include the amount of time needed to acquire, install any hardware. (Answered: Mar 19, 2014 12:39:38 PM EDT)
<p>Question 32</p> <ol style="list-style-type: none"> 1. Could you please provide the name of the companies that attended (in person or by phone) the Pre-bid Conference? 2. Do you want a solution installed on premises? yes or no 3. Do you want a Cloud Computing Hosted solution? yes / no / something to be considered. - Mar 18, 2014 3:51:53 PM CDT (Submitted: Mar 19, 2014 3:57:56 PM EDT)
<p>Answer</p> <ul style="list-style-type: none"> - See question #30. (Answered: Mar 20, 2014 7:45:10 AM EDT)
<p>Question 33</p> <p>Is the City willing to accept daily training rates inclusive of travel expenses as opposed to having them split out? (Submitted: Mar 20, 2014 9:01:30 AM EDT)</p>
<p>Answer</p> <ul style="list-style-type: none"> - No (Answered: Mar 20, 2014 9:30:06 AM EDT)
<p>Question 34</p> <ol style="list-style-type: none"> 1. Part I, #9. If happens, for how long you estimate the extension to hold pricing will be? 2. Part III, #9. What will be the acceptance criteria the City will use to accept and pay the invoices? Please explain.

System fields information: -
CREATED BY: ROBINM
DATE CREATED: 2008-02-21
DOCUMENT KEY: 0
FOLDER KEY: 204881
SYSTEM FLAGS: 0
SECURITY LEVEL: 0
LIFE CYCLE: L
OWNED BY: ROBINM
READ ONLY: N
SHORTCUT COUNT: 0
TIME CREATED: 09:42:07
MAJOR VERSION KEY: 0
MINOR VERSION KEY: 0
VIEW TYPE: PERMIT Folder
SYS_T_FLAG: 65
SYS_T_WF_STATUS: 0
SYS_T_WF_INSTFLAGS: 0
DOCUMENT INDEX DATA
Document fields information:-
PERMIT DOCUMENT CLASS: Permit
System fields information: -
CREATED BY: ROBINM
DATE CREATED: 2008-02-21
DOCUMENT KEY: 1134036
DOCUMENT ID: *1204194
DOCUMENT TYPE: Image
FILE EXTENSION: tif
FOLDER KEY: 204881
SYSTEM FLAGS: 0
SECURITY LEVEL: 0
LIFE CYCLE: L
OWNED BY: ROBINM
READ ONLY: N
RECORDS MANAGEMENT TYPE: PERMIT Folder
SHORTCUT COUNT: 0
RECORDS MANAGEMENT COUNT: 0
TIME CREATED: 09:42:07
VERSION FLAGS: 3
MAJOR VERSION: A
MAJOR VERSION KEY: 1
MINOR VERSION: 1
MINOR VERSION KEY: 1
VIEW FILE COUNT: 1
VIEW TYPE: PERMIT Document
SYS_T_FLAG: 66
SYS_T_WF_STATUS: 0
SYS_T_WF_INSTFLAGS: 0
1134036 (Answered: Mar 25, 2014 8:55:07 AM EDT)

Question 40

What is the budget amount that has been established for the initial project for DSD? (Submitted: Mar 21, 2014 8:35:11 AM EDT)

Answer

= 500,000 is budgeted for this fiscal year. (Answered: Mar 21, 2014 1:51:06 PM EDT)

Question 41**3.3 Training section:**

In approach 1. End User Training Approach, How many total end-users does the City want trained?

Does the City want all 250 end -users trained? (Submitted: Mar 21, 2014 8:43:46 AM EDT)

Answer

= 3.3 Training section:

In approach 1. End User Training Approach, How many total end-users does the City want trained? ANSWER: We are utilizing the number contained in PART VIII Onsite, E-1 Training Costs: our training room will accommodate (14) seats in addition to an instructor workstation. Please use this quantity for end users for the initial scope of work, and (4) for administrator type training. Please indicate whether there is a limit to the number of students in a class room/per Training/session, Instructor.

Does the City want all 250 end -users trained? (Submitted: Mar 21, 2014 8:43:46 AM EDT) Answer: See above (Answered: Mar 21, 2014 3:05:11 PM EDT)

Question 42

1. Does the city prefer to pay for redaction at the beginning of the project or in the near future when the redaction capability is going to be used?

2. Are electronic signatures needed for the DSD implementation?

3. Must redaction capability be delivered at the beginning of the project or can it be delivered at the time the future SOW that requires redaction is approved?

4. Will the city be storing original email files from Microsoft Outlook with their attachments into the system in its original format?

5. Will the city be storing original Microsoft Office files into the system in its original format?

6. Will it be advantageous for the city if in addition to storing the TIF and PDF/A version of, for example an original Microsoft Office file, to also store this original file?

7. Please clarify your answer ?All final records should be converted to tiff or pdf/A? as it related to section 6.3.4. Does the city want to have the original file stored along with the tiff or pdf/A version?

8. If there is an email with attachments that the end user wants to store into the system, does the city want the attachments to be ignored and not stored and only the email file is to be converted to tiff or pdf/A?

9. If there is an email with attachments that the end user wants to store into the system, does the city want the attachments to be extracted and stored along with the email separately after converted to tiff or pdf/A?

10. If there is an email with attachments that the end user wants to store into the system, does the city want the system to handle the email file and the attachments to be kept together as one large tiff or pdf/A file? (Submitted: Mar 21, 2014 12:39:34 PM EDT)

Answer

= 1. Does the city prefer to pay for redaction at the beginning of the project or in the near future when the redaction capability is going to be used? ANSWER: If your cost for software licensing per PART VIII Cost Proposal, Section 1. - A. 250 FULL User Licenses, does not include any needed functionality in a "Full" user license, please indicate what is and is not included as part of the cost addendum (as instructed in the RFP) to your response. Please price licenses for 250, for consistency purposes.

2. Are electronic signatures needed for the DSD implementation? Answer: None identified at this time. Please see response to question 1 above.

3. Must redaction capability be delivered at the beginning of the project or can it be delivered at the time the future SOW that requires redaction is approved? ANSWER: Redaction is within scope of the initial task order. Please see response to question 1 above.

4. Will the city be storing original email files from Microsoft Outlook with their attachments into the system in its original format? Answer: There is not a requirement to store emails

5. Will the city be storing original Microsoft Office files into the system in its original format? Answer: It is possible that some may exist, but all records for retention purposes must be TIF 6.0 or PDF/A format

6. Will it be advantageous for the city if in addition to storing the TIF and PDF/A version of, for example an original Microsoft Office file, to also store this original file? Answer: The official record must be TIF or PDF/A. Refer to Part V 06. Enterprise Requirements, the State of Florida Records Management - Standard and Requirements, Electronic Record keeping, Chapter 18-26, Florida Administrative Code (http://dils.dos.state.fl.us/barn/rules/1826_003FAC.cfm)

7. Please clarify your answer ?All final records should be converted to tiff or pdf/A? as it related to section 6.3.4. Does the city want to have the original file stored along with the tiff or pdf/A version? Answer: No not necessarily, the official record should be TIF or PDF/A

8. If there is an email with attachments that the end user wants to store into the system, does the city want the attachments to be ignored and not stored and only the email file is to be converted to tiff or pdf/A? Answer: There is not a requirement to store emails

9. If there is an email with attachments that the end user wants to store into the system, does the city want the attachments to be extracted and stored along with the email separately after converted to tiff or pdf/A? Answer: There is not a requirement to store emails

10. If there is an email with attachments that the end user wants to store into the system, does the city want the system to handle the email file and the attachments to be kept together as one large tiff or pdf/A file? (Submitted: Mar 21, 2014 12:39:34 PM EDT)

Answer: There is not a requirement to store emails (Answered: Mar 24, 2014 3:30:11 PM EDT)

Question 43

1. Is the Records Management module required for the Department of Sustainable Development?

2. The city makes references to various applications. Please state if the city prefers to have the following applications referenced (ECM, Document Management, Imaging System, Records Management System, Document and Information Capture) all from one manufacturer?

3. Will the city extract all the image files and associated metadata for the vendor to load into the new system?

4. Will the city provide the APIs and instructions of how to access the Global 360, Empower 360 version 4 product so the vendor can extract the files and metadata to load into the new system?

5. Please elaborate as to what specific departments from within the system will you be allowing users in the Internet to access?

6. Please elaborate as to what specific information from within the system will you be allowing users in the Internet to access?

7. Will the city provide the APIs and instructions of how to access the SunGard OneSolution (Community Development Module) product so the vendor can integrate with this system?

8. Will the city provide the APIs and instructions of how to access the Granicus Legistar/Insite product so the vendor can integrate with this system?

9. Due to the many definitions and interpretations of terms in the search market, please describe what the search functionality ?Fuzzy Searches? means to the city.

10. Due to the many definitions and interpretations of terms in the ECM market, please describe what the functionality ?Document Distribution? means to the city.

11. Does the city already have a backup & retrieval solution that can be used for the proposed solution or is the vendor supposed to provide a backup solution in the response? (Submitted: Mar 21, 2014 1:21:27 PM EDT)

Answer

= 1. Is the Records Management module required for the Department of Sustainable Development? ANSWER: Yes but may be implemented at a future date, but development of folder/document structure must include consideration for future implementation.

2. The city makes references to various applications. Please state if the city prefers to have the following applications referenced (ECM, Document Management, Imaging System, Records Management System, Document and Information Capture) all from one manufacturer? ANSWER: Preferably, Yes

3. Will the city extract all the image files and associated metadata for the vendor to load into the new system? ANSWER: Yes, unless the awarded vendor has a more efficient, less time consuming alternative.

4. Will the city provide the APIs and instructions of how to access the Global 360, Empower 360 version 4 product so the vendor can extract the files and metadata to load into the new system? ANSWER: I don't believe an API will be needed.

5. Please elaborate as to what specific departments from within the system will you be allowing users in the Internet to access? Department of Sustainable Development, Finance, City clerk and possibly others as the project progresses in the future.

6. Please elaborate as to what specific information from within the system will you be allowing users in the Internet to access? ANSWER: The City's Goal is to be Transparent, Open Government, such items would be Plans, Permits, Official Clerk Records, Agenda's, Minutes, Contracts, Future Financial data, expensed, revenues etc. as the

7. Will the city provide the APIs and instructions of how to access the SunGard OneSolution (Community Development Module) product so the vendor can integrate with this system? ANSWER: The City may work with the vendor to provide the API and needed details, however a vendor should have had past experience with integration with these system.

8. Will the city provide the APIs and instructions of how to access the Granicus Legistar/Insite product so the vendor can integrate with this system? ANSWER: The City may work with the vendor to provide the API and needed details, however a vendor should have had past experience with integration with these system.

9. Due to the many definitions and interpretations of terms in the search market, please describe what the search functionality ?Fuzzy Searches? means to the city. ANSWER: A text retrieval method based on 'fuzzy' logic, finds matches even when keywords or search words may be misspelled or hint at a concept or suggest.

10. Due to the many definitions and interpretations of terms in the ECM market, please describe what the functionality ?Document Distribution? means to the city. ANSWER: Ability to attach documents to workflow processes, integration with other system, exporting of records and data for records request purposes etc.

11. Does the city already have a backup & retrieval solution that can be used for the proposed solution or is the vendor supposed to provide a backup solution in the response? ANSWER: The City will provide the backup solution as per standard listed in Part IV, Section 04. (Answered: Mar 25, 2014 1:08:16 PM EDT)

Question 44

1. Due to the many definitions and interpretations of terms in the ECM market, please describe what the functionality ?Comprehensive Audit Reports? means to the city.

2. Will the city provide the necessary network infrastructure and server configurations to ensure the software application will deliver on the ?System Performance? specifications identified in the RFP?

3. Due to the important of cost requirements and to provide a fair and equitable price for the city in the response, please explain in detail how the city plans to control access to the public from the internet to the information stored in the system.

4. Due to the important of cost requirements and to provide a fair and equitable price for the city in the response, please provide examples of the types of ?Comprehensive Audit Reports? the city is expecting to be provided by the system. (Submitted: Mar 21, 2014 1:55:04 PM EDT)

Answer

= 1. Due to the many definitions and interpretations of terms in the ECM market, please describe what the functionality ?Comprehensive Audit Reports? means to the city. ANSWER: The city desires a comprehensive audit trail on folders/documents, to include add, view, delete, action date, time, revisions, fields modifications, old value, new values, events, process flow, etc.

2. Will the city provide the necessary network infrastructure and server configurations to ensure the software application will deliver on the ?System Performance? specifications identified in the RFP? ANSWER: Please refer to PART V - Sections 05, 06 and 7.1. It is the City's intention to ensure it procures a system that will deliver on System Performance

3. Due to the important of cost requirements and to provide a fair and equitable price for the city in the response, please explain in detail how the city plans to control access to the public from the internet to the information stored in the system. ANSWER: The City expects that the solution would provide for Workgroup security configurations, where permissions could be granted for accessing, view only access to identified data sets. For Internal as well as external users.

4. Due to the important of cost requirements and to provide a fair and equitable price for the city in the response, please provide examples of the types of ?Comprehensive Audit Reports? the city is expecting to be provided by the system. (Submitted: Mar 21, 2014 1:55:04 PM EDT) Answer: A documented example is not available but the City desires such information at the folder and document levels, to include add, view, delete, action date, time, revisions, fields modifications, old value, new values, events, process flow, etc. (Answered: Mar 24, 2014 3:31:08 PM EDT)

Question 45

1. What is City's definition of an experienced vendor? Please provide metrics such as minimum years of experience in the ECM, Capture, Integration, minimum number of years in business, etc.

2. For a distributed scanning solution, what is the average volume in pages expected to be processed by an end user per month?

3. Once a Task is approved and funded by the city can the funds be carried over from one fiscal year to another or will this project have to be re-funded if it spans fiscal years?

4. Once a Task has been approved, funded and started, could it be cancelled due to Legislative actions?

<p>5. If during the Task development and delivery, The City makes changes that affect the Task deliverables, Question: Will this be considered a Change Order Request? (Submitted: Mar 21, 2014 2:28:12 PM EDT)</p> <p>Answer</p> <p>- 1. What is City's definition of an experienced vendor? Please provide metrics such as minimum years of experience in the ECM, Capture, Integration, minimum number of years in business, etc. Answer: A vendor that has installed their solution with the specified software that we listed in the RFP and those customers are See PART IX Tab including Part X Section 03.</p> <p>2. For a distributed scanning solution, what is the average volume in pages expected to be processed by an end user per month? ANSWER: For The Department of Sustainable development we hope to accept mostly electronic Plans, permits etc. At this time this is unknown and could change depending upon the amount of development taking place within the City of Fort Lauderdale.</p> <p>3. Once a Task is approved and funded by the city can the funds be carried over from one fiscal year to another or will this project have to be re-funded if it spans fiscal years? ANSWER: If the project is approved, an agreement is in place and work has commenced, the funds budgeted as a project may be carried over from one fiscal year to another.</p> <p>4. Once a Task has been approved, funded and started, could it be cancelled due to Legislative actions? Answer: Yes</p> <p>5. If during the Task development and delivery, The City makes changes that affect the Task deliverables, Question: Will this be considered a Change Order Request? (Submitted: Mar 21, 2014 2:28:12 PM EDT) ANSWER: Yes, all information will be included into final agreement (Answered: Mar 25, 2014 8:11:47 AM EDT)</p>
<p>Question 46</p> <p>Will the City entertain a custom solution for this project? (Submitted: Mar 21, 2014 3:41:18 PM EDT)</p> <p>Answer</p> <p>- No (Answered: Mar 25, 2014 7:56:10 AM EDT)</p>
<p>Question 47</p> <p>1. What is the minimum number of redacted pages per month the system will need to be configured to support?</p> <p>2. What is the maximum number of users that will be accessing the redaction feature?</p> <p>3. How many document types (I don't mean pdf, tiff, doc, etc.) that must be configured for capture exist in the DSD organization?</p> <p>4. Will the vendor be disqualified if its offering contains custom software as allowed in the ?Project Definition and Objective? section which after completion would need to be certified as 508 and 5015.2 compliant? Could you please answer yes or no?</p> <p>5. Could you please answer yes or no if a vendor will be disqualified if it has not integrated or worked with the applications Granicus Legistar, NeoGov, SunGard's OneSolution Community Development Module?</p> <p>6. For clarification purposes, please specifically explain when the vendor will invoice the city, for what items the vendor will invoice the city and what must occur for the city to pay the vendor invoice(s).</p> <p>7. Will the city accept invoices based on successful delivery of agreed to deliverables defined in the project plan?</p> <p>8. Please provide an itemized list of the acceptance criteria the vendor must meet for the city to accept delivery of the system.</p> <p>9. Could you please answer yes or no if a vendor will be disqualified if before the award date the proposed solution is not DoD 5015.2 certify? (Submitted: Mar 21, 2014 4:15:53 PM EDT)</p> <p>Answer</p> <p>- 1. What is the minimum number of redacted pages per month the system will need to be configured to support? Answer: Unknown at this time. We don't foresee this need for the initial project for DSD.</p> <p>2. What is the maximum number of users that will be accessing the redaction feature? ANSWER: We don't foresee this need for the initial project for DSD. Future use by HR or City Clerk's office shall be needed. The number of users/workstations unknown at this time.</p> <p>3. How many document types (I don't mean pdf, tiff, doc, etc.) that must be configured for capture exist in the DSD organization? Currently at the document level there are 2 - 3 Document type/titles. This could change moving forward and with the integration of the OneSolution Application and the award vendor and solution.</p> <p>4. Will the vendor be disqualified if its offering contains custom software as allowed in the ?Project Definition and Objective? section which after completion would need to be certified as 508 and 5015.2 compliant? Could you please answer yes or no? Answer: Please see Part I, Section 08.</p> <p>5. Could you please answer yes or no if a vendor will be disqualified if it has not integrated or worked with the applications Granicus Legistar, NeoGov, SunGard's OneSolution Community Development Module? Answer: This requirement is part of the evaluation criteria as referenced throughout the RFP. See PART VI, Item 2.</p> <p>6. For clarification purposes, please specifically explain when the vendor will invoice the city, for what items the vendor will invoice the city and what must occur for the city to pay the vendor invoice(s). Answer: Per Part II, Section 09. A payment schedule shall be developed with the awarded vendor based upon an agreed schedule of deliverables.</p> <p>7. Will the city accept invoices based on successful delivery of agreed to deliverables defined in the project plan? Answer: Yes</p> <p>8. Please provide an itemized list of the acceptance criteria the vendor must meet for the city to accept delivery of the system. Answer: The specific criteria will be further developed with the awarded vendor based on the solution. See Part III, Section 28</p> <p>9. Could you please answer yes or no if a vendor will be disqualified if before the award date the proposed solution is not DoD 5015.2 certify? (Submitted: Mar 21, 2014 4:15:53 PM EDT) Answer: Please see Part I, Section 08. (Answered: Mar 24, 2014 9:09:01 AM EDT)</p>
<p>Question 48</p> <p>Kindly let us know the number of locations and machines that will be used for scanning purposes? (Submitted: Mar 21, 2014 4:27:42 PM EDT)</p> <p>Answer</p> <p>- Not identified at this time. If your cost for software licensing per PART VIII Cost Proposal, Section 1 - A. 250 FULL User Licenses, does not include scanning functionality in a "Full" user license, please indicate what is and is not included as part of the cost addendum (as instructed in the RFP) to your response. Please price scanning licenses for 250, for consistency purposes. (Answered: Mar 24, 2014 3:28:51 PM EDT)</p>
<p>Question 49</p> <p>Vendor assumes that the current RFP scope is intended for the solution deployment for the Department of Sustainable Development (DSD) and does not include the additional professional services that is required for solution to be implemented for additional departments. Please comment (Submitted: Mar 21, 2014 4:28:39 PM EDT)</p> <p>Answer</p> <p>- It is expected that Professional services shall be required for subsequent Task/Work orders for the additional departments. (Answered: Mar 24, 2014 2:03:57 PM EDT)</p>
<p>Question 50</p> <p>What is the functionality of the existing systems - Cayenta Utility Billing, SunGard OneSolution Community Development, Kronos Timekeeping Module, Granicus Legistar/Insite. Can you please elaborate on the level/type of integration expected with these systems and the ERP system? (Submitted: Mar 21, 2014 4:29:27 PM EDT)</p> <p>Answer</p> <p>- As clarified at the pre proposal conference, the sentence should have read that our current ERP RFP requirements do not include replacement of KRONOS Timekeeping (current Project) SunGard's OneSolution Community Development Solution (current implementation) and Cayenta Utility Billing.</p> <p>The current integration requirements are with SunGard's OneSolution Community Development Solution for the Department of Sustainable Development (current implementation), for all final plans, permits and associated documents to be archived to the new COMS solution, as well as future need (additional task/work order) for all final agenda items in the Granicus system (currently hosted off premise) e archived to the system as well. Future integrations for others could be identified as well as image enabling of an MS SQL ERP system, Tier II Solution. (Answered: Mar 24, 2014 2:05:00 PM EDT)</p>
<p>Question 51</p> <p>Vendor assumes that the workflow engine to be provided as a part of envisaged solution should be in accordance with Industry standard compliances such as BPEL and BPMN 2.0. Please confirm. (Submitted: Mar 21, 2014 4:30:16 PM EDT)</p> <p>Answer</p> <p>- The City desires that the solution supports the graphical design of workflows and is easy to use. (Answered: Mar 24, 2014 9:06:40 AM EDT)</p>
<p>Question 52</p> <p>Our understanding from the requirements mentioned in RFP is that the workflow engine required for the will be effective with foundational capabilities such as real time tracking, easy change management with process modelling capabilities and form designing and dashboard based reporting etc. This would allow the solution to be future proof and can be extended to multiple processes going forward. Do you envisage such capabilities in the solution? Please confirm. (Submitted: Mar 21, 2014 4:31:21 PM EDT)</p> <p>Answer</p> <p>- YES (Answered: Mar 24, 2014 9:11:46 AM EDT)</p>
<p>Question 53</p> <p>Kindly let us know the number of processes and provide the flowcharts of Processes that needs to be automated? (Submitted: Mar 21, 2014 4:32:11 PM EDT)</p> <p>Answer</p> <p>- Currently not identified (Answered: Mar 24, 2014 9:12:35 AM EDT)</p>
<p>Question 54</p> <p>Kindly let us know the maximum number of concurrency that is required for portal users? (Submitted: Mar 21, 2014 4:32:40 PM EDT)</p> <p>Answer</p> <p>- Concurrency usage is not known at this time. Unlimited portal access is requested (Answered: Mar 24, 2014 2:02:55 PM EDT)</p>
<p>Question 55</p> <p>Is there a requirement of Disaster recovery environment of the proposed solution? (Submitted: Mar 21, 2014 4:33:13 PM EDT)</p> <p>Answer</p> <p>- We are in the process of constructing a second data center and we will be migrating our core applications over this year and will continue to migrate more applications for redundancy as funds become available. We will need to configure redundancy for this application in the future. (Answered: Mar 25, 2014 8:10:07 AM EDT)</p>
<p>Question 56</p> <p>Is there requirement for solution to be provided in High availability or stand alone mode? (Submitted: Mar 21, 2014 4:33:53 PM EDT)</p> <p>Answer</p> <p>- The City desires the solution to be provided in high availability (Answered: Mar 24, 2014 2:01:55 PM EDT)</p>
<p>Question 57</p> <p>1. What is the minimum number of redacted pages per month the system will need to be configured to support?</p> <p>2. Please clarify and identify what license does the city specifically is referring to in Part I Item 05. The Florida Dept. of Business and Professional Regulation does not list a license category that applies for technology as it relates to the deliverables.</p> <p>3. Please clarify and identify what license does the city specifically is referring to in Part IX Tab 05. The Florida Dept. of Business and Professional Regulation doesn't list a license category that applies to technology as it relates to this RFP.</p> <p>4. Please clarify and explain what the city means by "The Contractor must have a Financial Size Categories (FSC) rating of no less than 7A." by the latest edition of Best's Key Rating Guide". The A.M. Best Company only rates Insurance companies.</p> <p>5. Due to the importance of cost and to provide a fair and equitable price for the city in the response please provide the city's testing plan that will be executed by the city to evaluate the successful delivery and acceptance as defined in Part 1 Item 28. (Submitted: Mar 21, 2014 4:55:43 PM EDT)</p> <p>Answer</p> <p>- 1. What is the minimum number of redacted pages per month the system will need to be configured to support? Answer: Unknown at this time. We don't foresee this need for the initial project for DSD.</p> <p>2. Please clarify and identify what license does the city specifically is referring to in Part I Item 05. The Florida Dept. of Business and Professional Regulation does not list a license category that applies for technology as it relates to the deliverables. Any that are required for the services you intend to provide.</p> <p>3. Please clarify and identify what license does the city specifically is referring to in Part IX Tab 05. The Florida Dept. of Business and Professional Regulation doesn't list a license category that applies to technology as it relates to this RFP. Any that are required for the services you intend to provide.</p> <p>4. Please clarify and explain what the city means by "The Contractor must have a Financial Size Categories (FSC) rating of no less than 7A." by the latest edition of Best's Key Rating Guide". The A.M. Best Company only rates Insurance companies. This refers to the Contractors bond. (Answered: Mar 25, 2014 10:45:45 AM EDT)</p>