

LAUDERDALE BY•THE•SEA



REQUEST FOR PROPSAL No. 2024-09-02

Document Imaging Services

RFP OPENING: September 2, 2024, 11:00 A.M.

Town Hall

4501 Ocean Drive

Lauderdale-By-The-Sea, FL 33308

TOWN OF LAUDERDALE-BY-THE-SEA, FLORIDA
REQUEST FOR PROPOSALS NO. 24-09-02

The Town of Lauderdale-By-The-Sea, Florida invites qualified firms to submit proposals to provide:

Document Imaging Services

The Town intends to award a contract to a firm(s) to provide services necessary for the project (the "Project") described herein.

The Town of Lauderdale-By-The-Sea, Florida (the "Town") will receive sealed proposals until 11:00 A.M. (local), September 30, 2024, in Town Hall, 4501 Ocean Drive, Lauderdale-By-The-Sea, FL 33308.

See Part II, Section H, for information regarding submitting a proposal.

The Town's contact information for this RFP is:

Katrina Adler, Town Clerk
4501 Ocean Drive
Lauderdale-By-The-Sea, Florida 33308
Telephone: 954-640-4201
Fax: 954-640-4236
Email: TownClerk@lbts-fl.gov

RFP documents may be obtained via the Internet at the Town of Lauderdale-By-The-Sea website at www.lauderdalebythesea-fl.gov and this RFP is posted on www.Demandstar.com. If you do not have internet access, you may obtain the documents by contacting the Town Clerk.

The Town reserves the right to reject proposals with or without cause and for any reason, to waive any irregularities or informalities, and to solicit and re-advertise for other proposals. Incomplete or non-responsive proposals may be rejected by the Town as non-responsive or irregular. The Town reserves the right to reject any proposal for any reason, including, but without limitation, if the Proposer fails to submit any required documentation, if the Proposer is in arrears or in default upon any debt or contract to the Town or has failed to perform faithfully any previous contract with the Town or with other governmental jurisdictions. All information required by this RFP must be supplied to constitute a proposal.

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Part I – Statement of Work

PART I - STATEMENT OF WORK

A. *OBJECTIVE*

The Town of Lauderdale-By-The-Sea is a seaside community with a permanent population of about 6,500 that increases to about 13,000 during the winter season.

The Town of Lauderdale-By-The-Sea seeks proposals from qualified vendors for a three (3) year agreement with three (3) one (1) year extensions to provide the Town with document imaging, scanning, indexing, and destruction services for historical and active, development applications, building permits and records. Scanning and indexing the documents into the Town's a cloud base storage system, Laserfiche, will enable staff to make permit records available online in the future enabling residents to easily obtain building permit information online.

The proposer will work with the Town to scan index and file documents and images within the Town's Laserfiche Cloud Repository and prepare and administer the destruction of digitized file in coordination with the Town Clerk and Development Services Department. Indexing will be approved according to Town Guidelines. Public records must be scanned in accordance with Rule 1 B-26.003, Florida Administrative Code. All file destruction will meet statutory retention requirements; and before proposer destroys any files, Town staff will review documents to ensure they have been properly uploaded and indexed according to the Town specifications. The proposer will be responsible for administering the indexing and destruction of files with the Town approval.

The proposer must be able to transport, store, and scan documents off-site. In the future, the Town may require the proposer to complete scanning on-site once the Town's existing space constraints have been resolved. The proposer will provide all equipment and supplies necessary to image/scan documents and plans up to 24"X36" in size. At each phase of the project, the proposer will provide and maintain a catalog to track the documents that have been taken off site, documents that have been scanned and documents that remain to be scanned. This catalog system will be updated daily. Quality control measures must also be established to ensure the files are effectively scanned and indexed.

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B. GENERAL INFORMATION

Lauderdale-By-The-Sea, Florida is a seaside community just north of Fort Lauderdale with a permanent population of 6,500 residents. Although small in population, over the last three (3) years, the Town has received an average of 1,568 building permit applications per year. Currently, permits, plans and historical property data is stored in the Town's file room in cabinets. The file room is now approaching maximum capacity after years of storage of thousands of files. Space limitations have now spurred the need for digital storage. Digitizing historical files not only reduces the need for storage space but also protects historical data in the event the file room is flooded due to a major rain event.

C. SCOPE OF WORK

The vendor shall provide the Town with document imaging, scanning, indexing and destruction services for historical and active, development applications, building permits and records that includes, at a minimum, all the following guidelines:

1. Digital Document Type - PDF and TIFF

Public records must be scanned in accordance with Rule 1 B-26.003, Florida Administrative Code. For records with a minimum retention of over 10 years, the rule states that the records must be scanned at a minimum 300 dpi and use a published International Organization for Standardization (ISO) open standard image format. These formats include TIFF (Specification 6.0), PDF, PDF/A, and others. The Town requires documents and images 11"x17" and smaller to be captured in 300 dpi and PDF text recognizable/searchable. Documents and images larger than 11x17" are required to be 400 dpi and either TIFF 6.0 or PDF, unless otherwise specified by Town Staff to prior to processing.

In addition, per Rule 1 B-26.003 of the Florida Administrative Code, record (master) copies of scanned images created by the agency from hard copy permanent or long-term records must be stored in accordance with a published International Organization for Standardization (ISO) open standard image format. The iso extension is an uncompressed archive disk image file that represents the contents of entire data on an optical disc such as CD or DVD. Based on the ISO-9660 standard, the ISO image file format contains the disc data along with the filesystem information that is stored in it.

2. Indexing

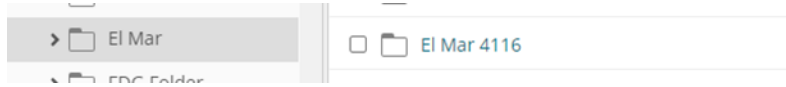
Naming Files – Files will be named according to the property files folder organization system within the Town's Laserfiche cloud storage software. Nearly all files to be imaged/scanned are

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associated with a Permit. The file will be named according to permit number and address as noted in the 2 examples below:



Permit 12-005699 – El Mar 4116 56

The permit number will be listed exactly as the above example.

The address follows a dash with the Street matching the Laserfiche filing system.

The file for El Mar Drive does not contain “Drive” so drive is not included in the file name.

4116 follows the street name.

56 represents unit, condominium number etc. and immediately follows to address number with a space between.



Permit 17-005566 – Tradewinds W 4241 – Plans (or similar wording to identify plan set files)

The permit number will be listed exactly as the above example.

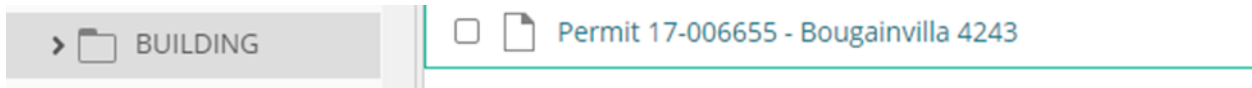
The address follows a dash with the Street matching the Laserfiche filing system. The file for Tradewinds does not contain “Drive” so drive is not included in the file name.

Tradewinds is North, South, East and West, so in the case the W indicates Tradewinds West.

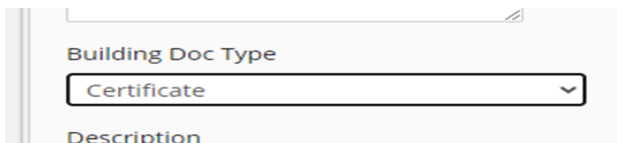
4241 follows the street name.

“Plans” is used in the name to indicate the file contains drawings sized over 11”x17”.

Filing - Permit files are saved to the applicable property address in the BUILDING folder within the specific property address. See example below:



When applicable, scan/image the property Certificate of Occupancy (CO) as a separate file using the “Building Document” Type, “Certificate” as shown in example below:



Name the file: Permit 17-006655 Bougainvilla 4243 – Certificate of Occupancy (or CO).

Metadata - Specific Metadata to be provided as part of indexing (in addition to naming file)

- a. Template Type – Selected “Dev – Building Template” from Dropdown Menu

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- b. Permit Number – Type Permit number per below
- c. Folio Number – Type without dashes
- d. Address – Type Street name, Number and Unit (if applicable) matching Laserfiche as noted in 2. Indexing portion of these guidelines.
- e. Building Document type – Selected from Dropdown menu “Permit” for all files 11”X17” size and “Drawings” for documents/drawings/plans over 11”X17” sized. Description –
- f. Description - Additional Identifying information or special notes to help identify documents contained within the file.

The screenshot shows a web-based document management interface. At the top, there is a header bar with a document icon, the text 'Permit 17-006655 - Bougainvill...', and a star icon. Below the header, there are tabs: 'Details', 'Fields' (which is highlighted with a green underline), 'Annotations', and 'More' with a dropdown arrow. The main content area is titled 'Template' and contains several input fields with labels and right-pointing arrows:

- Template:** A dropdown menu showing 'Dev - Building'.
- Permit Number:** A text input field containing '17-006655'.
- Folio:** A text input field containing '494318013420'.
- Address:** A text input field containing 'Bougainvilla 4243'.
- Building Doc Type:** A dropdown menu showing 'Permit'.
- Description:** A text input field containing 'Permit Folder file 8 1/2 x 11 and 8 1/2 by 14 documents', 'Drawings and Maps in separate file', and 'Related'.

3. Imaging/Scanning Particulars

The Proposer is responsible for preparing documents for scanning/imaging including the removal

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of all staples, fasteners, and paperclips; repair all torn or deteriorated edges with non-reflective tape or other method as accepted. Ordering/proper orientation of documents, examination of back sides for additional information to be scanned, straighten all folded plans and mount any irregular size memorandum on standard 8 1/2" x 11" paper and otherwise in preparation for scanning/imaging.

Any document with information contained on both the back page in addition to the front page, requires both front and back pages to be scanned/imaged. Back Pages or double-sided documents will be scanned and organized in a manner that requires the back page to be ordered immediately follow the front page in the digitally scanned/imaged document. Any back page scanned/imaged containing information (any page other than a blank page) will be counted as a page/image pursuant to specific unit cost as provided in by proposer in Form C.

Scanning process should provide for automatic detection for duplex scanning and blank pages. Both sides of documents shall be imaged as needed, excluding blank pages. All blank pages should be excluded from the process, including count and charge for scanned page(s).

Documents shall be rotated to provide maximum readability (e.g., letters shall be in the proper orientation when the document is displayed without rotation). All images must be correctly oriented when opened with no rotation. The Proposer will sight verify a random sampling of the resulting output for clarity and faithful reproduction. All documents and data that fail this quality assurance process are to be rescanned at no additional cost to the Town until the prescribed quality is met. The Proposer will also be required to perform a final quality control step that compares the final output to the manifest the Town provides to ensure that every document has been imaged and indexed.

Images must be aligned properly within the image environment. Images must not be skewed or distorted more than +/-3 degrees. Image line widths and text thickness must match the original image as closely as possible, without the loss of legibility of any portion of the image. The scanning equipment's specified "scan accuracy" must fall within the range of less than +/- 0.040" over 36 inches for Drawings. Paper skew tolerances must fall within the range of less than +/-0.1 %.

4. Storage and Accessibility

The proposer will provide and maintain a catalog to track the documents taken off site, documents that have been scanned and documents that remain to be scanned. This catalog system will contain/track the following:

- a. Documents that have been taken off site (initially, at the start of the project);
- b. Documents that have been scanned;
- c. Documents that have been indexed;
- d. Documents that have been approved for destruction;
- e. Documents that have been destroyed; and
- f. Documents that remain to be scanned.

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In the event a document is needed, the Town will require designated staff access to original documents supplied to the Proposer. The Proposer will provide the ability to locate and return to the town department any original document that is in the possession of the Proposer within (2) business days from the time of request by an authorized department agent. After the Town has fulfilled its need, the Proposer shall also pick up these documents and return with them to the Proposer's site to either complete the scanning, indexing or conversion process, whichever applies.

Safeguards against theft, loss, and /or damage must be maintained at the highest levels. The Proposer will be held responsible for lost, stolen and/or damaged original documents. The Proposer will be fined up to \$500 for a records box that is lost, stolen or damaged. Town Staff shall be provided access Proposer facility to inspect Town records within (2) business days of Town request for on-site access at Proposer facility.

5. Destruction

Once the Proposer has scanned images with proper indexing, and has checked for both clarity and accuracy, the Town Clerk's Office will normally require the Proposer to shred the original documents. The Town prefers the Proposer to do the shredding themselves on the Proposer's site, but the Town will permit the Proposer to hire an outside vendor that will perform shredding on the Proposer's site. The Town will not permit its documents to be taken off the Proposer's site for shredding. If the Proposer hires an outside shredding vendor to do the shredding on the Proposer's site, the outside shredding vendor must be bonded. In either instance, the Proposer will be required to have at least one of their own employees present during the shredding of all Town documents.

Proposer will provide document destruction services in accordance with state of Florida retention regulations. Proposer will be required to provide the Town Clerk's Office or Development Services Department Staff a signoff for "certificate of destruction" using the state of Florida Division of Library "Records Disposition Document," as the Proposer signs along with a witness signature, verifying what documents have been destroyed, the date of destruction and that the security of the documents was safeguarded through the entire destruction process. The Proposer will ensure the Records Disposition Document properly indicates the cubic feet and particular retention schedule of the documents digitized in coordination with the Town Clerk or Development Services Department Staff. The Town reserves the right to have its own designated employee(s) present during the Proposer's destruction process. The Town also reserves the right to use a different alternative for destruction of its documents if it is determined to be in the best interest of the Town.

D. TECHNICAL REQUIREMENTS

1. The proposer shall be authorized to do business in Florida and Broward County.

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2. The business shall have successfully managed a program of similar services for a minimum of five (5) years.
3. The successful proposer shall provide all labor, equipment, and materials necessary for the performance of the requested services as outlined in this RFP.
4. The proposer shall have experience with Laserfiche cloud storage system for a client within the state of Florida.
5. The proposer must have past contracts with other governmental jurisdictions for a similar project and submit those contracts with the proposal.
6. The proposer must have and provide references for previous clients where similar projects have been implemented.
7. The proposer must provide a history of meeting required time frames and deadlines.
8. The proposer must provide a detailed timeline and anticipated approach to the project.

E. *INSURANCE AND LICENSES*

The successful Proposer shall maintain in full force and effect throughout the contract: (a) insurance coverage reflecting the minimum amounts and conditions required by the Town, and (b) any required licenses.

1. **Comprehensive General Liability Insurance** - \$1,000,000 combined single limit of insurance per occurrence and \$2,000,000 in the general aggregate for Bodily Injury and Property Damage and \$2,000,000 general aggregate for Products/Completed Operations, Comprehensive General Liability insurance shall include endorsements for property damage; personal injury; contractual liability; completed operations; products liability and independent contractor's coverage.
2. **Workers' Compensation Insurance** – Statutory.
3. **Comprehensive Automobile Liability Insurance** - \$1,000,000 combined single limit of insurance per occurrence for Bodily Injury and Property Damage; \$1,000,000 Hired & Non-Owned Auto Liability.
4. **Professional Liability** – Please indicate if you carry Professional Liability Insurance and, if so, in what amount.

END OF PART I

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Part II –General Information

PART II: RFP GENERAL INFORMATION

A. DEFINITIONS

For the purposes of this Request for Proposals (RFP): **Proposer** shall mean the contractor, consultant, respondent, organization, firm, or other person submitting a response to this RFP. **Town** shall mean the Town of Lauderdale-By-The-Sea, Town Commission or Town Manager, as applicable, and any officials, employees, agents and elected officials.

Contact information for the purpose of this RFP shall mean:

Katrina Adler, Town Clerk
4501 Ocean Drive
Lauderdale-By-The-Sea, Florida 33308
Telephone: 954-640-4201
Email: townclerk@lbts-fl.gov

B. INVITATION TO PROPOSE; PURPOSE

The Town solicits proposals from responsible Proposers to perform work for or provide goods and/or services to the Town as specifically described in Part I, Statement of Work.

C. CONTRACT AWARDS

The Town Commission anticipates entering into a contract contingent on budget approval for the 2025 fiscal year with the Proposer who submits the proposal judged by the Town to be most advantageous to us. The Town anticipates awarding one contract, but reserves the right to award more than one contract if in its best interest. If the Town selects a Proposal, the Town will provide a written notice of the award.

The Proposer understands that neither this RFP nor the notice of award constitutes an agreement or a contract with the Proposer. A contract or agreement is not binding until a written contract or agreement has been approved as to form by the Town Attorney and has been executed by both the Town (with Commission approval, if applicable) and the successful Proposer.

D. PROPOSAL COSTS

Neither the Town nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this RFP. Proposers should prepare their proposals simply and economically, providing a straightforward and concise description of the Proposer's ability to meet the requirements of the RFP.

E. INQUIRIES

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The Town will not respond to oral inquiries. Proposers may e-mail inquiries for interpretation of this RFP to the attention of the Town Clerk. Please mark the correspondence “RFP No. 2024-09-02 QUESTION”.

The Town will respond to written inquiries received at least 7 working days prior to the date scheduled for receiving the proposals. The Town will record its responses to inquiries and any supplemental instructions in the form of a written addendum. If addenda are issued, the Town will email, mail or fax written addenda to any potential Proposer who has provided their contact information to the Clerk. Although the Town will try to notify each prospective Proposer of the addendum, it is the sole responsibility of a Proposer to remain informed as to any changes to the RFP.

F. DELAYS

The Town may postpone scheduled due dates in its sole discretion. The Town will attempt to notify all registered Proposers of all changes in scheduled due dates by written addenda.

G. PRE-PROPOSAL MEETING Pre-proposal meetings are available and encouraged to be scheduled prior to response submission.

H. PROPOSAL SUBMISSION

Proposers shall submit one (1) original hard copy of the proposal in a sealed, opaque package. The package shall be clearly marked on the outside as follows:

To: Town of Lauderdale-By-The-Sea

Submitted by: _____

Address: _____

Proposals may be submitted in person or by mail. **Proposer shall also submit one electronic copy via email to townclerk@lbts-fl.gov the email shall be titled:**

RFP No. 2024-09-02

Project: Document Imaging/Services

Late submittals, additions, or changes will not be accepted and will be returned to the bidder unopened.

Due to the irregularity of mail service, the Town cautions Proposers to ensure actual delivery of proposals to the Town prior to the deadline set for receiving proposals. Telephone confirmation of timely receipt of the proposal may be made by calling the Office of the Town Clerk before proposal opening time. Proposers may withdraw their proposals

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Part II –General Information

by notifying the Town in writing at any time prior to the opening. Proposals, once opened, become property of the Town and will not be returned.

I. PROPOSAL FORMAT

In order to ensure a uniform review process and to obtain the maximum degree of comparability, it is required that the proposals be organized in the manner specified herein. Unless otherwise specified, Proposers shall use the proposal forms provided by the Town herein. These forms may be duplicated, but failure to use the forms may cause your proposal to be rejected. Any erasures or corrections on the form must be made in ink and initialed by Proposer in ink. All information submitted by the Proposer shall be printed, typewritten or completed in ink. Proposals shall be signed in ink when submitted in person. When an RFP requires multiple copies, they may be included in a single envelope or package properly sealed and identified. Electronic submissions are also accepted and must be signed digitally.

All proposals shall be submitted as specified in this RFP. Any attachments shall 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 lacking this reference may be considered to have no reference material included in the additional documents.

Proposers shall prepare their proposals using the following format:

1. Letter of Transmittal
This letter will summarize in a brief and concise manner the Proposer's understanding of the scope of work and make a positive commitment to provide its services on behalf of the Town. The letter must name all the persons authorized to make representations for or on behalf of the Proposer, and must include their titles, addresses, and telephone numbers. An official authorized to negotiate and execute a contract on behalf of the Proposer must sign the letter of transmittal.
2. Title Page
The title page shall show the name of Proposer's agency/firm, address, telephone number, name of contact person, date, and the RFP No. and the Project name.
3. Table of Contents
Include a clear identification of the material by section and by page number.
4. Organization Profile and Qualifications
This section of the proposal must describe the Proposer, including the size, range of activities, and experience providing similar services.

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Part II –General Information

Each Proposer must include:

- Documentation indicating that it is authorized to do business in the State of Florida and, if a corporation, is incorporated under the laws of one of the States of the United States.
- A description of the primary individuals responsible for supervising the work including the percentage of time each primary individual is expected to contribute to this work.
- Resumes and professional qualifications of all primary individuals and identify the person(s) who will be the Town's primary contact and provide the person(s)' background, training, experience, qualifications and authority.
- Completed RFP Forms A, B, C, and D. All RFP forms are included as exhibits to this document.

5. Experience

The Proposer must describe its expertise in and experience with providing goods and/or services similar to those required by this RFP. Describe previous experience relating to the Scope of Work requested in this RFP. Has the firm worked for other governmental entities, particularly municipalities? If so, please describe the work performed and include contact information for references, the time the firm was engaged and a list of accomplishments for each.

6. Approach to Providing Services

This section of the proposal should explain the Scope of Work as understood by the Proposer and detail the approach, activities and work products to be provided.

7. Compensation

The proposal shall document the fee proposal for the goods and/or services on RFP Form C.

8. Additional Information

Any additional information which the Proposer considers pertinent for consideration should be included in a separate section of the proposal.

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Part II –General Information

J. PROPOSAL – Procedural Information

1. Interviews:

The Town reserves the right to conduct personal interviews or require presentations prior to selection. The Town is not responsible for any expenses which Proposers may incur in connection with a presentation to the Town or related in any way to this RFP.

2. Request for Additional Information:

The Proposer shall provide such additional information as the Town may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The Town reserves the right to make investigations of the qualifications of the Proposer as it deems appropriate, including but not limited to, a background investigation. Failure to provide additional information requested may result in disqualification of the proposal.

3. Proposals Binding:

All proposals submitted shall be binding for at least one hundred twenty (120) calendar days following opening. Town may desire to accept a proposal after this time. In such case, Proposer may choose not to continue to honor the proposal terms.

4. Alternate Proposals:

An alternate proposal is viewed by the Town as a proposal describing an approach to accomplishing the requirements of this RFP which differs from the approach set forth in the solicitation. An alternate proposal may be a second proposal submitted by the same Proposer, which differs in some degree from the prior proposal or from this RFP. Alternate proposals may be in the area of technical approach, or other provisions or requirements of this RFP. The Town will, during the initial evaluation process, consider all alternate proposals submitted and reserves the right to award a contract based on an alternative proposal if the same is deemed to be in the Town's best interest.

5. Proposer's Certification Form:

Each proposer shall complete the "Proposer's Certification" form included as RFP Form D and submit the form with the proposal. This form must be acknowledged by a witness who is present during the form's signing.

K. PUBLIC RECORDS

Proposals are public documents and subject to public disclosure in accordance with Chapter 119, Florida Statutes (the Public Records Law). Certain exemptions to the Public Records Law are statutorily provided for and it is the Proposer's responsibility to become familiar with these concepts. The contract will include a provision wherein the Proposer releases and agrees to defend, indemnify, and hold harmless the Town and the Town's

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Part II –General Information

officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the Town's treatment of records as public records. By statute, the contract will also contain the following clauses:

Contractor acknowledges that the public shall have access, at all reasonable times, to certain documents and information pertaining to Town contracts, pursuant to the provisions of Chapter 119, Florida Statutes. Contractor agrees to maintain public records in Contractor's possession or control in connection with Contractor's performance under this Agreement and to provide the public with access to public records in accordance with the record maintenance, production and cost requirements set forth in Chapter 119, Florida Statutes, or as otherwise required by law. Contractor shall ensure that public records that are exempt or confidential from public records disclosure requirements are not disclosed except as authorized by law.

Unless otherwise provided by law, any and all reports, surveys, and other data and documents provided or created in connection with this Agreement are and shall remain the property of Town. In the event of termination of this Agreement by either party, any reports, photographs, surveys and other data and documents and public records prepared by, or in the possession or control of, Contractor, whether finished or unfinished, shall become the property of Town and shall be delivered by Contractor to the Town Manager, at no cost to the Town, within seven (7) days of termination of this Agreement. All such records stored electronically by Contractor shall be delivered to the Town in a format that is compatible with the Town's information technology systems. Upon termination of this Agreement, Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure. Any compensation due to Contractor shall be withheld until all documents are received as provided herein. Contractor's failure or refusal to comply with the provisions of this section shall result in the immediate termination of this Agreement by the Town.

L. IRREGULARITIES; REJECTION OF PROPOSALS

The Town reserves the right to reject proposals with or without cause and for any reason, to waive any irregularities or informalities, and to solicit and re-advertise for other proposals. Incomplete or non-responsive proposals may be rejected by the Town as non-responsive or irregular. The Town reserves the right to reject any proposal for any reason, including, but without limitation, if the Proposer fails to submit any required documentation, if the Proposer is in arrears or in default upon any debt or contract to the Town or has failed to perform faithfully any previous contract with the Town or with other

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governmental jurisdictions. All information required by this RFP must be supplied to constitute a proposal.

M. EVALUATION METHOD AND CRITERIA

1. General

The Town shall be the sole judge of its own best interests, the proposals, and the resulting negotiated contract or agreement, if any. The Town reserves the right to investigate the financial capability, reputation, integrity, skill, business experience and quality of performance under similar operations of each Proposer, including shareholders, principals and senior management, before making an award. Awards, if any, will be based on both an objective and subjective comparison of proposals and Proposers. The Town's decisions will be final. The Town's evaluation criteria may include, but shall not be limited to, consideration of the following:

- A. ability to meet set standards;
- B. availability of qualified personnel
- C. compensation.
- D. expertise of personnel;
- E. financial resources and capabilities;
- F. past contracts with other governmental jurisdictions;
- G. past performance records;
- H. qualifications of Proposer;
- I. references;
- J. related experience in Florida;
- K. technical soundness of proposal; and,
- L. time frames.

2. Selection

The Town Manager or designee may conduct the selection process, or at the option of the Town Manager, it may be referred to a selection committee (the "Committee"). Either the Town Manager or designee or the Committee will review all proposals received and establish a list of selected Proposers deemed to be the most qualified to provide the service requested based in part on the criteria set forth above. The Town Manager or designee may submit a recommended firm or a "short list" or a combination of a recommended firm and the "short list" to the Town Commission and the Town Commission shall make a final award. The Town Manager or designee may request oral presentation from the Proposers. Proposers are advised that the Town reserves the right to conduct negotiations with the most qualified Proposer but may not do so. Therefore, each Proposer should endeavor to submit its best proposal initially.

Document Imaging Services

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Part II –General Information

N. REPRESENTATIONS AND WARRANTIES

In submitting a proposal, Proposer warrants and represents that:

1. Proposer has examined and carefully studied all data provided, and any applicable Addenda; receipt of which is hereby acknowledged.
2. Proposer has visited the relevant site, if any, and is familiar with and satisfied as to the general, local and “site” conditions that may affect cost, progress, and performance of goods and/or services in their proposal.
3. Proposer is familiar with and is satisfied as to all federal, state and local laws and regulations that may affect cost, progress and performance of the goods and/or services in their proposal.
4. If applicable, Proposer has obtained and carefully studied (or assumes responsibility for having done so) all documents available related to the subject of the RFP and performed any examinations, investigations, explorations, tests, studies and data concerning conditions that may affect cost, progress, or performance of the goods and/or services that relate to any aspect of the means, methods, techniques, sequences, and procedures to be employed by Proposer, including safety precautions and programs incident thereto.
5. Proposer has given Town written notice of all conflicts, errors, ambiguities, or discrepancies that Proposer has discovered in this RFP and any addenda thereto, and the written resolution thereof by the Town is acceptable to Proposer.
6. The RFP is generally sufficient in detail and clarity to indicate and convey understanding of all terms and conditions for the performance of the proposal that is submitted.
7. No person has been employed or retained to solicit or secure award of the contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, and no employee or officer of the Town has any interest, financially or otherwise, in the RFP or contract.

O. Town Contract

The selected Proposer is expected to execute the Town’s standard professional services contract, in the form approved by the Town Attorney. The contract will contain the following clauses required by Town Code, and all vendors are expected to comply with these requirements:

No officer or employee of the Town of Lauderdale-By-The-Sea, Florida, during his or her term of employment or for one year thereafter, shall have any interest, direct or indirect, in this contract or the proceeds thereof.

Document Imaging Services

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Part II –General Information

No vendor shall give, solicit for, deliver, or provide a campaign contribution directly or indirectly to a candidate or to the campaign committee of a candidate for the offices of Mayor or Commissioner.

End of Part II

RFP FORM A

Proposer: _____

QUALIFICATIONS STATEMENT

Note: Forms A, B & C are available in WORD format from the Town Clerk upon request.

THIS FORM MUST BE SUBMITTED WITH PROPOSAL TO BE DEEMED RESPONSIVE.

1. State the full and correct name of the partnership, corporation or trade name under which you do business and the address of the place of business. (If a corporation, state the name of the president and secretary. If a partnership, state the names of all partners. If a trade name, state the names of the individuals who do business under the trade name.)
 - 1.1. The correct and full legal name of the Proposer is:
 - 1.2. The business is a (Sole Proprietorship) (Partnership) (Corporation).
 - 1.3. The names of the corporate officers, or partners, or individuals doing business under a trade name, are as follows:
2. Please describe your company in detail.
3. The address of the principal place of business is:
4. Company telephone number, and e-mail addresses:
5. Number of employees:
6. Name of employees to be assigned to this Project:
7. Company identification numbers for the Internal Revenue Service:
8. Provide Broward County occupational license number, if applicable, and expiration date:
9. How many years has your organization been in business? Does your organization have a specialty?
10. List the last three projects of this nature that the firm has completed? Please provide project description, reference and cost of work completed.
11. Have you ever failed to complete any work awarded to you? If so, where and why?

Lauderdale-By-The-Sea RFP No. 24-09-02

12. Provide the following information concerning all contracts **in progress** as of the date of submission of this Proposal for your company, division or unit as appropriate.

Name of Project	Contract with:	Contract Amount	Estimated Completion Date	% of Completion to Date

(Continue list as necessary)

13. Provide the following information for any sub-consultants you will engage if awarded the contract.

Subcontractor Name	Address	Work to be Performed

The foregoing list of sub-consultants may not be amended after award of the contract without the prior written approval of the Town Manager, whose approval shall not be unreasonably withheld.

RFP Form B

Proposer: _____

REFERENCE FORM

Forms A, B & C are available in WORD format from the Town Clerk upon request.

THIS FORM MUST BE SUBMITTED WITH PROPOSAL TO BE DEEMED RESPONSIVE.

Give names, addresses and telephone numbers of five individuals, corporations, agencies, or institutions for which you have performed work similar to what is proposed in this RFP:

1. Name of Contact _____
Title of Contact _____
Telephone Number: _____ Email Address _____
2. Name of Contact _____
Title of Contact _____
Telephone Number: _____ Email Address _____
3. Name of Contact _____
Title of Contact _____
Telephone Number: _____ Email Address _____
4. Name of Contact _____
Title of Contact _____
Telephone Number: _____ Email Address _____
5. Name of Contact _____
Title of Contact _____
Telephone Number: _____ Email Address _____

RFP Form C

Proposer: _____

PRICE PROPOSAL FORM

Note: Forms A, B & C are available in WORD format from the Town Clerk upon request.

***THIS FORM MUST BE SUBMITTED WITH PROPOSAL TO BE
DEEMED RESPONSIVE.***

Name of Proposer: _____

Name of authorized representative of Proposer: _____

Instructions: Show the price/cost for each Item Description your firm will provide per the requested scope of work. Include the fees/costs associated with each proposed Item Description.

Pricing for imaging/scanning will include prepping, indexing and any transportation costs. Scanning for all 11"x17" documents/images will be combined and indexed as one file for each specific permit number. All drawings and other images larger than 11"x17" will be scanned and indexed as one file according to drawing sets per specific permit number. On average, drawings and plan sets will range between one and five drawing sets for each permit number.

Proposer agrees to provide services below in accordance with terms, conditions and specifications contained in the RFP. Firm, fixed costs/prices quoted for all products and services in this RFP shall be deemed as cost to the Town, including travel and any other miscellaneous expenses, and no other costs to the Town will be accepted. The Total Project Cost/Price SHALL include all fees and reimbursements for out-of-pocket costs.

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<u>Item Description</u>	<u>Town Department Annual Estimate</u>	<u>Proposer Unit Price</u>	<u>Total Price</u>
Unit Cost per Scanned Image/Document - Letter and Legal Size Documents 11"x17" and smaller	38,000 images/pages	_____	_____
Unit Cost per Scanned Image/Document - Letter and Legal Size Documents larger than 11"x17" and up to 24"x36"	5000 images/pages	_____	_____
Certified Destruction of Scanned Documents - Unit price per cubic feet	70 cubic feet	_____	_____
Totals			_____

Please ensure your Unit Price/Cost includes the cost of:

1. Onsite meetings with Town staff when requested to inspect work;
2. A verbal report of any defects, damage or issues that may be noticed during imaging;
and

Payments will be made on each deliverable upon receipt and acceptance by the Town.

Appendix A
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By: _____

Date: _____

Name: _____

Title: _____

RFP FORM D

Proposer: _____

***THIS FORM MUST BE SIGNED AND SUBMITTED WITH PROPOSAL TO BE
DEEMED RESPONSIVE.***

The undersigned guarantees the truth and accuracy of all statements and the answers contained herein.

PROPOSER'S CERTIFICATION

I have carefully examined the Request for Proposal referenced above ("RFP") and any other documents accompanying or made a part of this RFP.

I hereby propose to furnish the goods or services specified in the RFP. I agree that my proposal will remain firm for a period of 120 days in order to allow the Town adequate time to evaluate the proposals.

I certify that all information contained in this proposal, which includes the TOWN required RFP forms A, B, C and D, is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to submit this proposal on behalf of the firm as its act and deed and that the firm is ready, willing and able to perform if awarded the contract.

The firm and/or Proposer hereby authorizes the Town of Lauderdale-by-the-Sea, its staff or consultants, to contact any of the references provided in the proposal and specifically authorizes such references to release, either orally or in writing, any appropriate data with respect to the firm offering this proposal.

I further certify, under oath, that this proposal is made without prior understanding, agreement, connection, discussion, or collusion with any other person, firm or corporation submitting a proposal for the same product or service; no officer, employee or agent of the Town or any other proposer is interested in said proposal; and that the undersigned executed this Proposer's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

If this proposal is selected, I understand that I will be expected to execute the Town's standard professional services contract, in the form approved by the Town Attorney.

A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crimes may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, sub-contractor, or consultant under a contract with a public entity, and may not transact business with any public entity in excess

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of the threshold amount provided in Sec. 287.017 Florida Statutes, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list. I further certify, under oath, that neither the entity submitting this sworn statement, not to my knowledge, any of its officers, directors, executives, partners, shareholder, employees, members or agents active in the management of the entity has been convicted of a public entity crime subsequent to July 1, 1989.

Name of Business

By: _____
Signature

Print Name and Title

Mailing Address

Witness:

By: _____
Signature

Print Name