

SUBMIT BID RESPONSES TO:

**PROCUREMENT OFFICE, BUILDING #2
SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT
2379 BROAD STREET (U.S. HIGHWAY 41 SOUTH)
BROOKSVILLE, FLORIDA 34604-6899
TELEPHONE: 352/796-7211 FAX: 352/754-6884**

INTRODUCTION

The Southwest Florida Water Management District (District) requests bids from responsive and responsible bidders for **RECORD STORAGE, RETRIEVAL, DESTRUCTION AND RELATED RECORDS MANAGEMENT SERVICES**. These goods/services are more specifically described in Section 4 of this Request For Bid (RFB). The selected respondent, hereinafter same as successful bidder or Contractor, shall deliver the required goods and render the required services F.O.B destination point at **the District's Brooksville and Tampa facilities, and other locations as required**. The terms respondent, successful bidder and Contractor shall be used interchangeably throughout this RFB.

All bidders shall have a records storage facility within a one hundred (100) mile radius of the District's Tampa Service Office

**Mandatory Pre-Bid Conference
July 31, 2007
10:00 A.M. Eastern Time
Southwest Florida Water Management District
Brooksville Service Office, Building #2
Human Resources Conference Room, Room #251
2379 Broad Street
Brooksville, Florida 34604
352-796-7211, extension 4133**

**VENDORS ARRIVING AFTER THE SCHEDULED STARTING TIME SHALL
BE PRECLUDED FROM PARTICIPATING IN THE BID.**

All interested parties are required to attend the MANDATORY Pre-Bid Conference. The purpose of this conference is to allow potential respondents an opportunity to present questions to staff and obtain clarification of the requirements of the bid document. Because the District considers such a conference to be critical to understanding the bid requirements, attendance at the pre-bid conference is MANDATORY to qualify as a respondent. Minutes of the conference will not be published

1. GENERAL CONDITIONS

- 1.1 **BID RECEIPT AND OPENING**. All bids must be received by the District's Procurement Office, on or before **August 24, 2007 at 2:30 P.M.** Bids, which are not timely received by this specific office, will not be accepted. Bids will be opened immediately after this date and time, and shall remain binding upon the bidder for a period of 90 days thereafter.
- 1.2 **BID WITHDRAWAL**. Bids may be withdrawn prior to the date and time set forth in **Paragraph 1.1** above if an authorized representative of the bidder submits to the District, and the District receives, a signed written request to withdraw said bid.
- 1.3 **BID SIGNATURE AND FORM**. Bidder, or an authorized representative of the bidder, must manually sign the attached Bid Response Form where indicated. All bids must be typed, printed and signed in non-erasable ink in the spaces provided on the Bid Response Form. All corrections made to the bid by the bidder must be initialed.
- 1.4 **SEALED BIDS**. Bids must be clearly stated on the Bid Response Form and must be submitted in a sealed envelope. The BID NUMBER, BID NAME AND DATE AND TIME of the bid opening must be on the face of the envelope IN THE LOWER LEFT HAND CORNER. If bids are sent via Express Mail, all bid documents must be placed in a separate sealed envelope, properly identified with the above referenced information, within the Express Mail envelope, and the BID NUMBER, ETC. as stated above must be stated on the outer envelope. **A MANDATORY COPY OF YOUR RESPONSE PACKAGE MUST BE INCLUDED WITH YOUR BID. ONE (1) ORIGINAL AND FOUR (4) COPIES OF YOUR BID MUST BE RECEIVED BY PURCHASING AND CLEARLY MARKED.**

- 1.5 **BID AMOUNT.** Bid amounts or prices shall be firm and shall include all packing, handling, shipping and delivery charges
- 1.6 **QUESTIONS.** The District will accept **written** questions relating to this RFB **only** during the following ten (10) day period: from **July 31, 2007 through August 13, 2007.** **NO** questions in any form will be accepted prior to, or after, the above stated dates
- 1.7 **MANUFACTURER'S NAME AND APPROVED EQUIVALENTS.** **NOT APPLICABLE.**
- 1.8 **CORRESPONDENCE.** Unless otherwise stated or notified in writing, correspondence relating to this RFB shall be sent to the District at the address set forth in the heading above, and to the bidder at the address stated on the Bid Response Form.
- 1.9 **AWARDS.** The District reserves the right to make award(s) by individual item, division, aggregate or none, or a combination thereof; with one or more bidders; to cancel the bid, reject any and all bids or waive any minor irregularity or technicality in bids received. Any award, and related documents such as a purchase order or contract, shall include all applicable terms and conditions set forth in this RFB.

In order to be eligible for an aggregate bid award, bidders shall bid all 54 items. Likewise, in order to be eligible for divisional bid award, bidders shall bid all items listed as belonging to each division.

- 1.10 **BID TABULATION AND NOTICE OF AWARD.** Bid tabulations with notice of award(s) or intended award(s) will be posted for review by interested parties at the location where bids were opened for a period of seventy-two (72) hours after the bid opening. Interested parties may inquire by mail, enclosing a stamped self-addressed envelope at the address as stated in the paragraph named "Correspondence" or in person at the District Headquarters for information about the award or intended award. All parties submitting bids will be mailed written notice of the District's award or intended award.

Preliminary bid tabulations will be furnished prior to notification of intended award only upon written request with an enclosed, self-addressed, stamped envelope enclosed with the bid response. Bid files may be examined at the Purchasing Office in the Brooksville headquarters during normal working hours by appointment.

BID TABULATIONS WILL NOT BE PROVIDED BY TELEPHONE OR FAX

- 1.11 **BID PROTESTS.** Any bidder who protests the bid specifications or award, or intended award, shall file with the District a notice of protest and formal protest in compliance with Chapter 28-110, Florida Administrative Code, and applicable provisions in Section 120.57, Florida Statutes. Failure to timely file such documents shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.
- 1.12 **TAXES.** The Southwest Florida Water Management District (District) is exempt from federal excise tax and state sales tax (exemption number 85-8013700387C-6).
- 1.13 **AMERICANS WITH DISABILITIES ACT.** The Southwest Florida Water Management District does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of the District's functions including one's access to, participation, employment, or treatment in its programs or activities. Anyone requiring reasonable accommodation as provided for in the Americans With Disabilities Act, should contact the Finance Office Administrator at 352-796-7211 or 1-800-423-1476 (Florida Only), extension 4121; TDD ONLY 1-800-231-6103; FAX 352-754-6876.
- 1.14 **PUBLIC RECORDS LAW.** Correspondence, materials and documents received pursuant to this Request For Bids become public records subject to the provisions of Chapter 119, Florida Statutes. Bidders failure to provide such records to District shall be grounds for unilateral termination by the District.
- 1.15 **PUBLIC ENTITY CRIMES.** Pursuant to Florida Statutes, Section 287.133(2) and (3), 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 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, 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 Florida Statutes, Section 287.017 for CATEGORY TWO, for a period of 36 months from the date of being placed on the convicted vendor list. By signing this Agreement, CONTRACTOR warrants that it is not currently on a suspended vendor list and that it has not been placed on a convicted vendor list in the past 36 months. CONTRACTOR further agrees to notify the District if placement on either of these lists occurs.

- 1.16 **INDEMNIFICATION**. The bidder awarded this RFB shall indemnify and hold harmless the DISTRICT from all liabilities, claims, damages, expenses or actions, either at law or in equity, including court costs and attorney's fees, that may hereafter at any time be made or brought by anyone on account of personal injury, property damage, loss of monies or other loss, caused or incurred, in whole or in part, as a result of any negligent, wrongful or intentional act or omission, or based on any act or omission by bidder, its agents, employees, subcontractors, assigns, heirs or anyone for whose acts or omissions any of them may be liable
- 1.17 **INTERNET AVAILABILITY**. Since June of 2003, the District's solicitations have been advertised on DemandStar.com. For a small annual fee, vendors may register to automatically receive District and other Hernando County agency bid announcements (regardless of service/commodity) by choosing Hernando County listings via fax or email. Although the District serves 16 Florida counties, all District solicitations are broadcast from Hernando County. Solicitations packages may also be obtained from the District by following the instructions given within the advertisement for each individual solicitation.
- All major District solicitations are available for review and download at the following Internet address: www.demandstar.com/supplier/bids/agency_inc/bid_list.asp?f=search&mi=347474
- 1.18 **CHANGES, DELAYS AND ADDENDA**. The District reserves the right to delay scheduled RFB due dates if determined to be in the best interest of the District. Any changes, delays or addenda related to this RFB issued by the District shall be sent to all persons/firms recorded as having received the original RFB. Persons/firms receiving the RFB from the District's internet website (listed in Paragraph 1.17, above) will be responsible to recheck the websites for any changes or addenda related to this RFB.
- 1.19 **SUBCONTRACTORS**. Nothing in this Agreement shall create, or be implied to create, any relationship between the DISTRICT and any subcontractor of the second party
- 1.20 **SUBCONTRACTOR'S FEDERAL CONDITIONS COMPLIANCE. NOT APPLICABLE.**
- 1.21 **NO BID**. A respondent who is on the bid mailing list, but who decides not to submit a bid, must still respond by returning only the Bid Response Form, marking it "NO BID" and explaining the reason in the space provided. Failure to respond three (3) times without justification shall be cause for removal of the supplier's name from the bid mailing list. **NOTE:** To qualify as a response, a bidder must submit the Bid Response Form marked "NO BID" and explain the reason for the "No Bid". The form must have a manual signature and company name, and must be received as per the paragraph named "BID RECEIPT AND OPENING".
- 1.22 **CANCELLATION**. The District reserves the right to cancel this RFB prior to bid opening and shall give notice of cancellation by posting a notice both in the press and on the District's website. Additionally, the District reserves the right to reject all bids and cancel this RFB, and cancel the Award or Intent to Award after the bids have been opened; notice of this cancellation shall be posted on the District's website and sent to all Respondents. No Respondent shall have any rights against the District arising from its selection by means of an Award or Intent to Award, thus, the District may cancel the Award or Intent to Award after it has been made but before a contract has been signed. Any contract resulting from this RFB may be cancelled for the convenience of the District upon giving 10-days written notice.

2. **SPECIAL CONDITIONS.**

- 2.1 **CONTRACT/AWARD PERIOD**. The contract/award period shall be for a five (5) year period beginning on the date of the notice of intended award, and will remain in full force and effect thereafter annually for as long as the District has a need for the awarded goods or services, and providing that adequate funding has been appropriated each fiscal year to pay for the awarded goods or services.
- 2.2 **FURNISHING BID SERVICES**. Award / contract services are to be furnished on an "as-needed, when-needed basis" during the life of the award/contract and there is NO guaranteed quantity expressed or implied to be utilized.
- 2.3 **PRICE ESCALATION**. The period of performance for this bid is from January 1, 2008 through December 31, 2008. It may be extended for four (4) one (1) year periods at the same terms and conditions, with the mutual agreement of all parties. If the contract is extended, the District is amenable to an annual increase in cost equal to the Federal Consumer Price Index (CPI), beginning in January 2008. The District (Department) will ascertain the new contract prices based on the increase for the 12-month period prior to the extension. The increase will be added to the purchase price at the beginning of the term of the contract extension. The District will use CPI information provided by the United States Department of Labor.
- 2.4 **USE BY OTHER STATE AND LOCAL GOVERNMENTAL ENTITIES**. All other governmental entities within the State of Florida may utilize this bid, and the bid prices (adjusted for the user's physical location) shall be extended to them, if requested, as they are to the District.

2.5 **INSURANCE.** Any contract(s) resulting from this proposal shall require the successful Contractor to maintain during the entire term of the contract insurance in the following kinds and amounts or limits with a company or companies authorized to do business in the State of Florida. The Contractor shall not commence work under the contract(s) until the District has received an acceptable certificate or certificates of insurance showing evidence of such coverages:

2.5.1 Liability insurance on forms no more restrictive than the latest edition of the Commercial General Liability policy (CG 00 01) of the Insurance Services Office without restrictive endorsements, or equivalent, with the following minimum limits and coverages:

Per Occurrence \$ 500,000
General Aggregate \$1,000,000

2.5.2 Automobile liability insurance, including owned, non-owned and hired autos with the following minimum limits and coverages:

Bodily Injury per Person \$ 100,000 and
Bodily Injury Liability per Occurrence \$ 300,000 and
Property Damage Liability \$ 100,000
or
Combined Single Limit \$ 500,000

2.5.3 CONTRACTOR shall carry workers' compensation insurance in accordance with Chapter 440, Florida Statutes (F.S.), and/or maritime law, if applicable. If CONTRACTOR does not carry workers' compensation coverage, CONTRACTOR must submit to the DISTRICT both an affidavit stating that the CONTRACTOR meets the requirements of an independent contractor as stated in Chapter 440 F.S. and a certificate of exemption from workers' compensation coverage.

2.5.4 Certificates of insurance shall provide for mandatory thirty (30) days prior written notice to the District of any change or cancellation of any of the required insurance coverages.

2.5.5 Certificates of insurance shall be required from any Sub-Contractors otherwise the CONTRACTOR must provide evidence satisfactory to the DISTRICT that coverage is afforded to the Sub-Contractor by the CONTRACTOR'S insurance policies.

2.6 **BACKGROUND CHECKS.** Each firm submitting a response to this RFB shall have an ongoing policy of conducting pre-employment background checks that predates this solicitation. This ongoing policy shall include, but is not limited to, verification of social security numbers and identification and a criminal records check.

2.7 **INSPECTION.** The District reserves the right to inspect the bidder's facilities and review their personnel prior to recommending any award under this solicitation to determine compliance with specifications of the bidder's facilities, policies, and any forms to insure minimum state, local, and federal guidelines.

The District likewise reserves the right during the course of any award made under this solicitation to inspect, with or without prior notice, the awardees' facilities for the purpose of determining continued compliance with all terms and conditions of this award.

2.8 **MANDATORY PRE-BID CONFERENCE.** All bidders **must** attend the mandatory pre-bid conference which will be on **July 31, 2007 at 10:00 a.m. (Sharp) in the Human Resources Training Room, Room #251** located in Building 2 at the District's Headquarters located at 2379 Broad Street (U.S. Highway 41 South), Brooksville, Florida 34604 (see District map at District website, Section 1.18). Bidders arriving late or failing to attend may not submit a bid.

3. **SPECIAL CONDITIONS FOR FEDERAL CONTRACTS.** No Federal monies will be expended on any award made under this solicitation.

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4. **SCOPE AND SPECIFICATIONS.** Subject to all terms and conditions of this RFB, the Contractor shall provide all necessary facilities, equipment, protection devices, supervision, labor and transportation to perform initial moving, storage and indexing, retrieval, certified record destruction, pick up, delivery, document imaging and miscellaneous services for various type records to include, but not limited to, drawings, boxed records, back-up tapes, magnetic and microform media, video and audio tapes, miscellaneous printed and stored materials etc upon request by the District during the term of any award(s) made under this solicitation.
- 4.1 **SCOPE.** It is the purpose of the resulting agreement to furnish and deliver, if and when ordered, to the Southwest Florida Water Management District (DISTRICT), all **Record Storage, Retrieval, Destruction and Related Records Management Services** for the District's **Brooksville, Tampa, Bartow, and Sarasota** facilities. The terms and conditions of this RFB are incorporated into any resulting relationship between a bidder and the District.
- 4.2 **SPECIFICATIONS.** The specifications for this solicitation are as follows:
- 4.2.1 **CHANGE OF CONTRACT RELOCATION SERVICES.** This Section applies only in the event that the records must be moved from a storage location of the former Contractor immediately preceding the beginning of this service agreement. The records are currently stored in a record storage facility located in Tampa, Florida. The District has estimated that there are approximately twenty five thousand cubic feet (25,000 CF) of various types of records currently in storage. In the event that a new contract award is made to a contractor other than the current contractor, the awardee shall be responsible for all costs associated with relocating these records to the new storage facility including, but not limited to, record pulls from previous contractor's facility, palletizing and transportation to new facility, setup in new facility, and all other labor, inventory and tracking involved in transferring from current to new storage facility.
- 4.2.2 The Contractor shall prepare an inventory of all records as they are being moved into the storage facility based on the existing labels on the records and prepare an index. All such moving, inventorying, and indexing shall be completed within thirty (30) calendar days, or a mutually agreed upon time frame, from receipt of District's purchase order and shall be performed so as to allow users reasonable access to all records throughout the process. Upon completion the Contractor shall furnish the District with a copy of the index and supporting inventory. The index of records in storage shall be an ASCII format data file supplied on a diskette, CD-ROM or DVD. Work papers and supporting documents, either original paper or legible xerographic copies relating to the inventory, shall also be supplied to verify the accuracy of the data entry to the index.
- 4.2.3 The Contractor shall not store any District records in any other storage facility/facilities other than the original proposed record facility/facilities without prior written approval from the District's Document Services Manager or designated representative.
- 4.3 **SERVICES.** The Contractor shall perform storage, inventory and indexing services in accordance with the terms of this RFB in a storage facility meeting the requirements set forth herein.
- 4.3.1 The Contractor must maintain a current inventory and index of boxed records in storage on barcode-enabled software. This inventory database of District records shall at all times be the sole property of the District. The Contractor shall provide the District with a copy of the latest database, in the requested format, on an "as-needed, when-needed" basis.
- 4.3.2 The Contractor must send a copy of each New Material Transfer sheet to Records Retention within thirty (30) calendar days after receipt of shipments of new boxed records from the user. The paper-copy of the New Material Transfer Sheets shall be annotated with the Contractor's assigned identification numbers corresponding to the District Box Number in order to allow the District to verify the receipt, indexing and processing of new boxes of records to storage. The integrity of the index and inventory of boxes of records in storage are essential to the management of the District's records. The Contractor must provide for the verification of the data and any corrections to the index and inventory database. New Material Transfer Sheets are provided by the Contractor and completed by authorized District personnel.
- 4.3.3 The Contractor must provide the ability to merge records tracking data between the District's Record tracking software and the Contractors' record tracking software.
- 4.4 **CATEGORIES OF SERVICE.** There are several categories of records management services that are required by the District. The categories of service are:
- 4.4.1 Archival Service provides for the long-term storage of boxes of inactive records in climate controlled space.
- 4.4.2 File Level Service provides for access and retrieval of individual files. Each file in a box of records is identified and indexed for retrieval. The insertion of additional items to a file is also provided in this service.

- 4.4.3 Vital Records Service provides for the long-term storage and preservation of irreplaceable records. A specialized, non-water fire-suppression system is used in a climate-controlled storage vault such as Halon, FM200 or an approved equivalent.
- 4.4.4 Tape Service provides regularly scheduled retrieval, refile, storage (*in a separate vault dedicated to magnetic media*) and delivery of sets of digital tapes to the District's computer facility located in Tampa, Florida.
- 4.4.5 SKILLED LABOR TO PERFORM ALL INDEXING, SCANNING, FILE ORGANIZATION AND RETRIEVAL FUNCTIONS ON THE DISTRICT'S IMAGING SYSTEM. This service is performed by the Contractor 40 hours per week, excluding District observed holidays, on a continuous basis at the District's Brooksville headquarters. The selected individual shall possess a skill set that includes operating personal computers using Microsoft Word and Excel Spreadsheets, PC hardware peripherals (such as various types of printers, scanners, switches, etc.), PC imaging and database software such as IMR ALCHEMY® and STELLENT® (imaging and records management database software respectively). Familiarity with the State of Florida Public Records Laws, the State of Florida Records Retention Scheduling Requirements, Standard Records Retrieval and Re-file Practices for Vital Active and Inactive Records, are desirable and familiarity with legal terminology and practices.

The selected individual shall retain and have a valid Florida driver license and transportation to transport himself/herself to other locations as may be required by the District. The District will reimburse the selected individual for travel expenses in accordance with the District's Travel Procedure 13-5.

The Contractor shall be responsible for all training and associated expenses necessary to insure that the selected individual has the required skills to maintain a competent working knowledge of all software systems and curriculum, current and future, as utilized by the District applicable to the position requirements.

The District reserves the right to require the Contractor to remove any employee(s) from the job or to shut down the job at no cost to the District, if, in the District's opinion, the Contractor or the employee(s) is not doing the work as required by this Request for Bids and if this failure is observed by District representatives.

Additionally, the District reserves the right to add additional personnel, with similar type qualifications and duties, as required. The District and the Contractor shall mutually agree upon requirements for work responsibilities and compensation, and shall confirm such with a District purchase order or written agreement.

- 4.4.6 The Contractor shall perform additional services as specified in the Fee Schedule, including but not limited to the following: retrieval, pick up, rush special delivery, regular schedule delivery, miscellaneous labor services, destruction of records, transportation to new location, and services performed outside business hours. At its option, the District may, or may not choose to perform courier services to and from the Contractor's site. However, if Contractor service is required, deliveries and/or pick up of new material or the pick up of records to be refiled shall be accomplished by the end of the next business day or within 2 hours for rush orders after notification by a fax, phone request, or internet email to the designated location.
- 4.4.7 The Contractor must have the ability to provide document imaging services for District records. All imaging by the Contractor must be of good quality, based on the quality of the original document, and provide this service on-demand. Documents must be imaged at a minimum of 300dpi and consistent with all applicable State requirements and specifications. This service shall not be outsourced without the express written agreement of the District.

4.5. SERVICE ACCESS.

- 4.5.1 A phone number shall be provided for fax service request during normal business hours (8:00 a.m. through 5:00 p.m., Monday through Friday). Numbers shall be changed only after verbal notification and written notice has been received by the District. The primary methods of making a service request shall be via facsimile, phone or internet e-mail.
- 4.5.2 The Contractor shall provide the capability for submitting service requests via Internet e-mail.
- 4.5.3 There shall be a twenty-four (24) hour telephone number to call for service during and after business hours, which shall be answered at all times by an employee of the Contractor. Upon request, the Contractor shall provide telephone reference concerning the records on a twenty-four (24) hours basis by dispatching personnel to the storage facility to read from the records over the telephone to authorized District personnel. That number shall be changed only after verbal notification and written notice has been received by the District.

4.6. END OF CONTRACT TRANSFER.

- 4.6.1 If requested by the District, upon termination or expiration of the Contract, the new Contractor shall, within thirty (30) calendar days, or on a mutually agreed upon schedule, transport the records to a new location designated by the District. All records shall be packed in boxes provided by the new Contractor at the Contractor's expense and

labeled in accordance with the index. If necessary, the Contractor shall consult with the District with respect to any records whose index classification cannot be determined.

4.6.2 The retrieval and removal of records for the end of Contract transfer shall be considered similar to a regular retrieval. Termination fees and/or permanent removal fees shall not be charged.

4.7 DESTRUCTION OR REMOVAL OF RECORDS.

4.7.1 The Contractor agrees to destroy stored records from inventory and records picked up from District facilities only upon receipt of a written authorization signed by the District Records Management Liaison Officer.

4.7.2 The method of destruction shall be by recycling or by shredding the documents on request.

4.7.3 A certification of the destruction of records for all authorized records destruction's shall be sent to the District's Records Management Officer.

4.8 INVOICES.

4.8.1 The Contractor shall establish an account, or multiple accounts if necessary, for the District. Invoices for each account shall be sent to the attention of the Accounts Payable Section at the address as contained on the Order Authorization form.

4.8.2 The Contractor shall provide a monthly invoice with the following supporting documentation:

4.8.2.1 An itemized list of charges for record storage and other services by user account.

4.8.2.2 A copy of a signed receiving document for each invoiced activity.

4.9 RECORDS STORAGE FACILITY.

4.9.1 The storage facility shall be located within a one-hundred (100) mile radius of the District's Tampa Service Office Located at 7601 Highway 301 North, Tampa, Florida 33637.

4.9.2 The records storage facility shall have climate controlled spaces with temperature and humidity regulation suitable for long-term hard copy records which is a maximum of 70 degrees Fahrenheit and a humidity level between 40% and 50% with a minimum of cycling that should be maintained at less than 10 degrees Fahrenheit and 10% humidity to prevent degradation of the paper.

4.9.3 The records storage facility shall be rated to withstand a Category 5 hurricane, and cannot be located in any designated flood plains or flood zones.

4.9.4 The records storage facility shall be capable of providing at least 25,000 cubic feet of space for immediate use and an additional 3,000 cubic feet each year during the service term. The Contractor will be compensated only for occupied storage space.

4.9.5 The Contractor shall provide electronic fire, burglary, and vandal detection systems that are monitored on a twenty-four (24) hour basis seven (7) days per week.

4.9.6 Records shall be stored in a fire resistant building in accordance with "Public Records Storage Guidelines for Records Centers and Archives" equipped with an alarm, which is capable of notifying the Fire Department instantly of any apparent emergency. There must be a smoke detector plus an inert gas fire-suppressant system, or a sprinkler system that covers the storage facility. Vital Records Storage, used for the storage of vital records, tapes and microfilm, shall have an inert gas fire-suppressant system, such as HALON or FM200 gas system or a dry pipe sprinkler system that covers the storage facility.

4.9.7 Storage vaults, constructed totally from noncombustible materials in accordance with "NFPA 223" and related fire codes – will be provided for the storage of vital records consisting of magnetic media, microforms, and paper media. The various media shall be stored in separate vaults or, if stored in the same structure, must be separated by a fire wall of NFPA approved construction with appropriate fire resistant doors and shall have an inert gas fire suppressant system, such as HALON or FM200 gas system.

4.9.8 The records storage facility shall have: (1) a regular and standby/backup power supply sufficient to maintain proper archival environmental controls, security, fire detection and suppression equipment, and an HVAC system with adequate levels of control to establish and maintain archival storage conditions, including heating, cooling, dehumidification, humidification, 24-hours per day regardless of electrical power conditions, and (2) a slightly positive air pressure balance maintained within the records storage area so as to ensure a consistency of temperature and relative humidity, and to minimize infiltration of contaminants. The facility shall maintain a temperature of 65 to 75 degrees, with a variation of no more than two degrees, and the relative humidity should remain at 45% to 55%, with a variation of no more than five percent.

4.9.9 The temperature of the Vital Records Storage Vaults for computer magnetic tapes, microfilm, and paper records must be maintained within a range of 62 to 68 degrees Fahrenheit with a variation of no more than two degrees, and relative humidity of 35% to 45% with a variation of no more than five percent

4.10 **BASIS AND METHODOLOGY OF BID AWARD.** Respondents shall submit quotes for each group in order to be considered eligible for award of that group. The District desires to make an aggregate award to the best respondent based upon the following criteria which shall be evaluated by a panel of four (4) District staff comprised of the Document Services Manager, Administrative Services Manager, Purchasing Manager and a key representative from a user department.

<u>Category</u>	<u>Point Range</u>
4.10.1 Price	0 – 20
Lowest total cost response meeting or exceeding all specifications in all categories (20)	
4.10.2 Quality of Service	0 – 10
Organization and cleanliness of storage facility (5)	
Professionalism of staff and standard operating procedures (5)	
4.10.3 Quantity of Services	0 – 40
File Level services (10)	
Document Imaging services (10)	
On-demand services (10)	
Disaster Recovery services (10)	
4.10.4 References	0 - 30
Ability to furnish all services in a timely manner (10)	
Performance History (10)	
Organizational History (10)	

5. **ACCESS TO RECORDS.**

5.1 Access to District records shall be limited to authorized District personnel as designated in writing. The Contractor shall maintain a sign-in sheet and require identification from all persons seeking access to the records. Contractor shall obtain from the District, and maintain on file, the list of authorized District Personnel

5.2 The Contractor shall provide reasonable on-site facilities to be used by authorized District personnel while examining records at the storage facility. A photocopy machine must be located within the records storage facility for use by authorized District personnel with copy charges as stated in the Fee Schedule bid response

5.3 The Contractor must also have the ability to provide on-demand imaging of District records stored in their facility and to provide transfer of the digitized images via FTP or other acceptable method, to the District, in a timely manner as defined by the District's business requirements

6. **PEST CONTROL.** The Contractor shall keep the storage facility free of pests and rodents at all times. Upon request, the Contractor must be able to substantiate verification of regular monthly pest and rodent exterminations at the storage facility throughout the service term

7. **DISASTER RECOVERY.** The Contractor shall have a documented disaster recovery plan. The plan shall address recovery procedures and methods in case of natural disaster or maleficent actions. The Contractor shall be capable of responding to fire damaged records, water damaged records, and be able to irradiate and wipe down records subjected to mold or other contaminants if and when necessary. The plan shall be made available to the District on request

8. **DIGITAL TAPE STORAGE.** Digital tapes shall be transported in transfer cases to be provided by the Contractor. Contractor shall store digital tapes on racks and/or in transfer cases on shelves.

9. **HANDLING CHARGES.** Handling charge, shall not apply to the first 20 boxes of a delivery, but only to those in excess of 20 boxes. For example, on a delivery of 25 boxes, the handling charge would apply only to the 21st to 25th boxes.

10. **ESTIMATED QUANTITIES NOT GUARANTEED.** The estimated quantities specified herein are not a guarantee of actual quantities, as the District does not guarantee any particular quantity of records for storage, retrieval or destruction services during the term of this contract. The quantities may vary depending upon the actual needs of the user. The quantities specified herein are good faith estimates of usage during the term of this contract. Therefore, the District shall not be liable for any contractual agreements/obligations the Contractor enters into based on the District using the services in the quantities specified herein.

11. **WARRANTY OF SERVICES.**

11.1 **DEFINITIONS:** *Acceptance* as used in this clause means the act of an authorized representative of the District by which the District assumes for itself, approval of specific services, as partial or complete performance of the contract. *Correction* as used in this clause, means the elimination of a defect.

11.2 Notwithstanding inspection and acceptance by the District or any provision concerning the conclusiveness thereof, the Contractor warrants that all services performed under this RFB will, at the time of acceptance, be free from defects in workmanship and conform to the requirements of this contract. The District shall give written notice of any defect or nonconformance to the Contractor within a one-year period from the date of acceptance by the District. This notice shall state either (1) that the Contractor shall correct or re-perform any defective or non-conforming services at no additional cost to the District, or (2) that the District does not require correction or re-performance.

11.3 If the Contractor is required to correct or re-perform, it shall be at no cost to the District, and any services corrected or re-performed by the Contractor shall be subject to this clause to the same extent as work initially performed. If the Contractor fails or refuses to correct or re-perform, the District may, by contract or otherwise correct or replace with similar services and charge to the Contractor the cost occasioned to the District thereby, or make an equitable adjustment in the contract price.

11.4 If the District does not require correction or re-performance, the District shall make an equitable adjustment in the billing.

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MANDATORY INFORMATION FORM
(SHALL BE RETURNED WITH BID RESPONSE)

List a minimum of at least 3 business references:

1. Business Name: Southwest Florida Water Management District
Contact Person: Al Gamino
Address: 2379 Broad Street, Brooksville, Florida 34604
Phone No.: (800) 423-1476 Ext 4052

Service Performed: Relocated 15,000 boxes from a previous vendor and validated the inventory during transfer. Cross-referenced the SWFWMD box number to the CRM barcode number. Perform 15 to 30 retrievals and refiles on a daily basis. Receive and index 100 new boxes per month. Provide on site personnel to manage the records vaults at various service centers. Also provided 6 onsite personnel for an 18 month special project to the Technical Services Department.

2. Business Name: City of Tampa
Contact Person: Rosemary Hayes
Address: 1102 N. Florida Avenue, Tampa, Florida 33602
Phone No.: (813) 274-7181

Service Performed: Relocated 24,000 boxes from an internal storage facility and validated the inventory during transfer. Cross-referenced the City of Tampa box number to the CRM barcode number. Perform 10 to 20 retrievals and refiles on a daily basis. Receive and index 300 new boxes per month

3. Business Name: Dept. of Children & Families
Contact Person: Lon Lamson
Address: 9393 N. Florida Avenue, Tampa, Florida 33612-7907
Phone No.: (813) 558-5863

Service Performed: Relocated 40,000 boxes from a previous vendor and validated the inventory during transfer. CRM performs all file level indexing for case files and maintains an inventory in Total Recall. Perform 10 to 20 retrievals and refiles on a daily basis. Receive and index 1,000 new boxes per month

Provide a written statement regarding the size and capacity facility:

Brief statement about facility size:

CRM's Record Center consists of 40,000 square feet capable of storing 300,000 cubic feet of records. Vital Record vaults comprise approximately 2,500 square feet. A new Record Center is in the design phase that will be capable of storing over 500,000 cubic feet of records.

What equipment is available to perform this/these services or functions?:

The Record Center is racked with heavy duty pallet racking with a mezzanine installed. Powered order pickers are not required to access records. CRM has 2 large format scanners, 2 high speed document scanners, a flatbed scanner, and a microfilm/fiche scanner for Imaging Services.

**SOUTHWEST FLORIDA WATER
MANAGEMENT DISTRICT
PROCUREMENT SECTION**
**BID RESPONSE FORM
FOR
RECORDS STORAGE, RETRIEVAL AND RELATED SERVICES**
BID NUMBER RFB 0711

The undersigned bidder has carefully read this Request For Bid and its provisions, terms and conditions covering the equipment, materials, supplies or services as called for, and fully understands the requirements and conditions. Bidder certifies that this bid is made without prior understanding, agreement, or connection with any corporation, firm, entity, or person submitting a bid for the same goods/services (unless otherwise specifically noted), and is in all respects fair and without collusion or fraud. Bidder agrees to be bound by all the terms and conditions of this Request For Bid and certifies that the person(s) signing this bid is (are) authorized to bind the Bidder. Bidder agrees that if Bidder is awarded this Request For Bid Bidder will provide the materials or services as stipulated in the specification of this Request For Bid. Bidder further agrees to furnish and to deliver as indicated, **FOB DISTRICT FACILITY/FACILITIES OR DESIGNATED LOCATIONS**, with all transportation charges prepaid, and for the prices quoted thereon as follows:

Firm prices shall be stated and include all packing, handling, shipping charges and delivery.

FEE SCHEDULE - BID RESPONSE FORM

Item No.	DESCRIPTION	ESTIMATED ANNUAL USAGE	UNIT	UNIT PRICE	TOTAL
ARCHIVAL SERVICE: A/C SPACE					
1	Record Storage Boxes (all sizes included), monthly rental rate per cubic foot:	25,000	Cu. Ft	0.30	7,500.00
2	Retrieval of an Existing Record in Storage including all handling charges related to the Individual Box:	1,400	Box	1.75	2,450.00
3	Refile of an Existing Record in Storage:	1,400	Box	1.75	2,450.00
4	Delivery of the Record(s) to the Requesting Department (1 to 20 boxes per delivery); Rush Special Delivery within 2 hours	25	Tampa Each Delivery	35.00	875.00
		50	Brooksville Each Delivery	100.00	5,000.00
5	Delivery of the Record(s) to the Requesting Department (1 to 20 boxes per delivery); Regular Schedule Delivery within the next day	50	Tampa Each Delivery	12.00	600.00
		100	Brooksville Each Delivery	50.00	5,000.00
6	Handling Charge for Deliveries of more than 20 boxes to Brooksville	8	Box	1.50	12.00
7	Pick-Up of New Material for Storage in Brooksville	45	Box	1.50	67.50
FILE LEVEL SERVICE:					
8	Retrieval of an Existing Record in Storage including all handling charges related to the Individual file	10	File	2.00	20.00
9	Refile of an Existing Record in Storage	10	File	2.00	20.00

Item No.	DESCRIPTION	ESTIMATED ANNUAL USAGE	UNIT	UNIT PRICE	TOTAL
10	Delivery of the Record(s) to the Requesting Department (1 to 20 files per delivery): Rush Special Delivery within 2 hours	2	Tampa Each Delivery	35.00	70.00
		2	Brooksville Each Delivery	100.00	200.00
11	Delivery of the Record(s) to the Requesting Department (1 to 20 files per delivery): Regular Schedule Delivery within the next day	4	Tampa Each Delivery	12.00	48.00
		4	Brooksville Each Delivery	50.00	200.00
12	Handling Charge for Deliveries of more than 20 files	12	File	0.25	3.00
13	File level Identification of Records (Indexed and labeled for file level retrieval)	500	File	0.50	250.00
14	Inter-file of new material to existing file in storage	50	File	2.25	112.50
15	On-demand file level imaging	10	File	5.00	50.00
VITAL RECORDS SERVICE (VAULT):					
16	Micrographic Storage Boxes - monthly rental rate per cubic foot	250	Cu. Ft	2.00	500.00
17	Paper Storage Boxes - monthly rental rate per cubic foot	250	Cu. Ft	2.00	500.00
18	Delivery of the Record(s) to the Requesting Department (1 to 20 boxes per delivery): Rush Special Delivery within 2 hours	10	Tampa Each Delivery	35.00	350.00
		20	Brooksville Each Delivery	100.00	2,000.00
19	Delivery of the Record(s) to the Requesting Department (1 to 20 boxes per delivery): Regular Schedule Delivery within the next day	20	Tampa Each Delivery	12.00	240.00
		40	Brooksville Each Delivery	50.00	2,000.00
20	Handling Charge for Deliveries of more than 20 boxes	6	Box	1.50	9.00
21	Pick-up of New Material for Storage	30	Box	1.50	45.00
22	Pull or Refile of an Existing Record in Storage	90	Box	1.75	157.50
TAPE SERVICE:					
23	Tape rotation Service, Daily Basis per retrieval	40,000	Tape pull	0.25	10,000.00
24	Tape rotation Service, Daily Basis per refile	40,000	Tape refile	0.25	10,000.00
25	Scheduled Tape Rotation Delivery/Exchange per trip charge	260	Trip Tampa	12.00	3,120.00

Item No.	DESCRIPTION	ESTIMATED ANNUAL USAGE	UNIT	UNIT PRICE	TOTAL
26	Per slot storage per month	500	Each Slot	0.30	150.00
27	Per case storage per month	6	Each Carton	2.00	12.00
ADDITIONAL SERVICES:					
28	Removal of Index Record from System, for Permanently Retrieved Boxes	250	Box	0.00	0.00
29	Accession charge, new inventory	1,500	Box	1.50	2,250.00
30	Destruction of Records which are already in storage (includes retrieval of the box, removal from the system and destruction of the box)	1,000	Box	3.00	3,000.00
31	Destruction of Records which are not already in storage and which will not be placed in storage (boxes picked up from the user's location for destruction)	200	Box	3.00	600.00
32	Charge for special projects or miscellaneous services at an hourly rate	200	Hour	22.00	4,400.00
33	Charge for Imaging labor	2,080	Hour	22.00	45,760.00
34	Monthly computer index and inventory update of new material in storage	12	Report	0.00	0.00
35	Ad-hoc computer index and inventory listing of holdings in storage	5	Report	0.00	0.000
36	Photocopying	200	Page	0.25	50.00
37	Facsimile service for records in storage	200	Page	0.25	50.00
38	Retrieval, staging and refile of boxes at vendor site for viewing	200	Box	1.75	350.00
39	Charge for access and delivery outside of normal business hours	5	Access	125.00	625.00
40	Floor storage of palletized material - monthly rental rate per pallet	10	Pallet	17.50	175.00
DISASTER RECOVERY SERVICES:					
41	Salvage fire damaged records	100	Hour	22.00	2,200.00
42	Freeze dry water damaged records	2,000	Cu. Ft.	80.00	160,000.00
43	Irradiate & Wipe down contaminated records <1,000	500	Cu. Ft.	80.00	40,000.00
44	Irradiate & Wipe down contaminated records >1,000	2,000	Cu. Ft.	80.00	160,000.00
SUPPLIES:					
45	Standard record storage box, 1.25 cubic ft	2,000	Box	2.25	4,500.00
46	Legal record storage box, 2.5 cubic ft	1,000	Box	5.50	5,500.00

Item No.	DESCRIPTION	ESTIMATED ANNUAL USAGE	UNIT	UNIT PRICE	TOTAL
	IMAGING SERVICES:				
47	Letter to Ledger Size B & W	N/A	each	0.075	N/A
48	Large Format D and E Size drawings B & W	N/A	each	0.95	N/A
49	Gray scale scanning	N/A	each	12.50	N/A
50	Color Scanning Letter to Ledger Size	N/A	each	0.25	N/A
51	Color Scanning Large Format D & E Size	N/A	each	20.00	N/A
52	Duplicate CD/DVD's	N/A	each	5.00	N/A
53	On-site Labor rate per person	N/A	hour	22.00	N/A
54	Bates Numbering per Page	N/A	page	0.01	N/A

NOTE:

At its option, the District may choose to award the bid in its entirety or by category (division), whichever is determined to be in the best interest of the District. If it is determined to split the award by category (division), the following categories (divisions) will be awarded accordingly based upon the unit price times the good faith estimated volumes listed herein.

The following line items will be considered in determining low bid awards of entire categories (divisions) for the various services:

A - Archival Services A/C

Items 1 through 15, 28 through 32 and 34 through 44

B - Vital Records Services - Vault

Items 16 through 22, 26 through 32, 34 through 40 and 41 through 44

C - Tape Services

Items 23 through 27, 32, 39, 41 and 42

D - Imaging Labor

Item 33 only

E - Imaging Services

Items 47 through 54

BID INCLUDES materials/services at the destn. as designated by the purchase order or the req. of.

CERTIFIED RECORDS MANAGEMENT, LLC

BIDDER - (Company Name As Contained On Corporate Seal)

P.O. BOX 76155

TAMPA

FLORIDA

33675-1155

MAILING ADDRESS

CITY

STATE

ZIP CODE

4300 EAST 7th AVENUE

TAMPA

FLORIDA

33605

PHYSICAL ADDRESS

CITY

STATE

ZIP CODE

(813) 247-1944

(813) 247-5644



TELEPHONE NUMBER

FAX NUMBER

AUTHORIZED SIGNATURE (Manual)

Aug. 23, 2007

RICHARD RUCK, GENERAL MANAGER

DATE

AUTHORIZED SIGNATURE (Typed, Title)

59-3611278

FEDERAL I. D. NUMBER

[NOTE:] If you are entering a "No Bid", please state reason in space below or on the back of this form, and return.

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