

Advanced Data Solutions

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Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch. Docs
12696-535--01-01	GROUP 1 - Scanning, Indexing, Imaging and Media Conversion Services	Supplier Product Code: Supplier Notes: See Cost Proposal Uploaded	First Offer - \$583,000.00	1 / lump sum	\$583,000.00 Y Y
12696-535--01-02	GROUP 2 - Microfiche Conversion Services	Supplier Product Code: Supplier Notes: ADS is not proposing on the microfiche conversion services	First Offer - \$0.00	1 / lump sum	\$0.00 Y
					Supplier Total \$583,000.00

Advanced Data Solutions

Item: **GROUP 1 - Scanning, Indexing, Imaging and Media Conversion Services**

Attachments

- Cost Proposal.pdf
- ADS Response Document - COFL - Final.pdf
- Bid Proposal Certification.pdf
- Contract Payment Method.pdf
- Disadvantaged Business Enterprise Preference.pdf
- E Verify.pdf
- Local Business Preference.pdf
- Non-Collusion Statement.pdf
- Non-Discrimination Compliance.pdf
- QA.pdf
- References.pdf

Section 8 – Required Forms

Section VI – COST PROPOSAL PAGE

Cost for Services Performed	30%	☒
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Proposer Name: Advanced Data Solutions, Inc.

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Proposer shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

PRICING FOR SCANNING/IMAGING SERVICES:

Pricing for scanning/imaging must include prepping and indexing.

TRANSPORTATION COSTS

Proposers must include any transportation costs in the unit price per image.

GROUP 1 - Scanning, Indexing, Imaging and Media Conversion Services

No.	Item Description	Estimated Quantity	Unit Price	Total Price
1.1	Unit cost/per scanned image, letter and legal sized documents, up to 11" x 17"	7,000,000	\$.055	\$385,000.00
1.2	Unit cost/per scanned image, for E size shop drawings.	400,000	\$.495	\$198,000.00
1.3	Destruction documents after scanning and review of scanned images by the City is complete. Unit price per pound	100,000	Included	\$0.00
1.4	Cost per character indexing above 30 characters	7,000,000	Included	\$0.00
	GROUP 1 TOTAL:			\$583,000.00

GROUP 2 - Microfiche Conversion Services

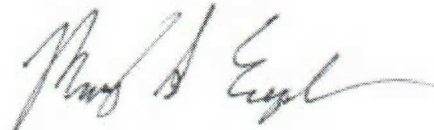
No.	Item Description	Estimated Quantity	Unit Price	Total Price
2.1	Unit cost/per scanned image, of 16 – 35mm microfiche flats, at an average of 8 images per jacket; to be converted to scanned images	500,000	N/A	N/A
2.2	Destruction documents after scanning and review of scanned images by the City is complete.	500,000	N/A	N/A
2.3	Indexing Images by block, lot, parcel, address and/or permit number	500,000	N/A	N/A
2.4	Cost per character indexing above 30 characters	250,000	N/A	N/A
	GROUP 2 TOTAL:			N/A

ADS is not bidding on the Microfiche Conversion Services

Submitted by:

Melody S. Engle
Name (printed)

October 18, 2022
Date



Signature

President
Title

1 – TABLE OF CONTENTS, EVALUATION CRITERIA & SCORING SYSTEM

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**** Submitted Electronically in BidSync Portal**

Evaluation Criteria / Scoring System

Description	%	Section	Status
Cost for Services Performed	30%	8	☒
Understanding the Overall Needs of the City for Services	25%	2	☒
Experience, Qualifications and Past Performance	25%	3	☒
Methods & Resources for Performing Services	10%	4	☒
Security of Service Facility	10%	5	☒

Our Proposal Format

Within the body of our proposal, the City of Fort Lauderdale requirements are outlined within a table format and highlighted in blue. In order to ensure each requirement and point value sections have been addressed, we have answered each one specifically. This should also facilitate an easier review for evaluation committee members.

Section 2 – Understanding the Overall Needs of the City for Services

Understanding the Overall Needs of the City for Services	25%	☒
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We chose to address the City's individual Technical Specifications / Scope of Services (your section 3) as well as your proposal requirements (your section 4) outlined in your solicitation for purposes of clarifying our adherence to each item. All requirements have been fully read and understood. Some items are condensed herein to ease the burden of review.

3.1.1 Introduction

The City requests the Proposer to have sufficient resources to be able to provide the Services in an efficient and accurate manner. The City and the awarded Proposer will mutually develop a procedure as well as a pickup and delivery schedule.

- ✓ **Satisfied. As the incumbent vendor, ADS has been providing document imaging services to the COFL for five years. We will comply with a COFL specific schedule as determined by your team. ADS is financially solvent and completely unencumbered. We employ up to 35 people working two shifts, six days a week.**

3.1.2 Scope of Work – Services Overview and Approach

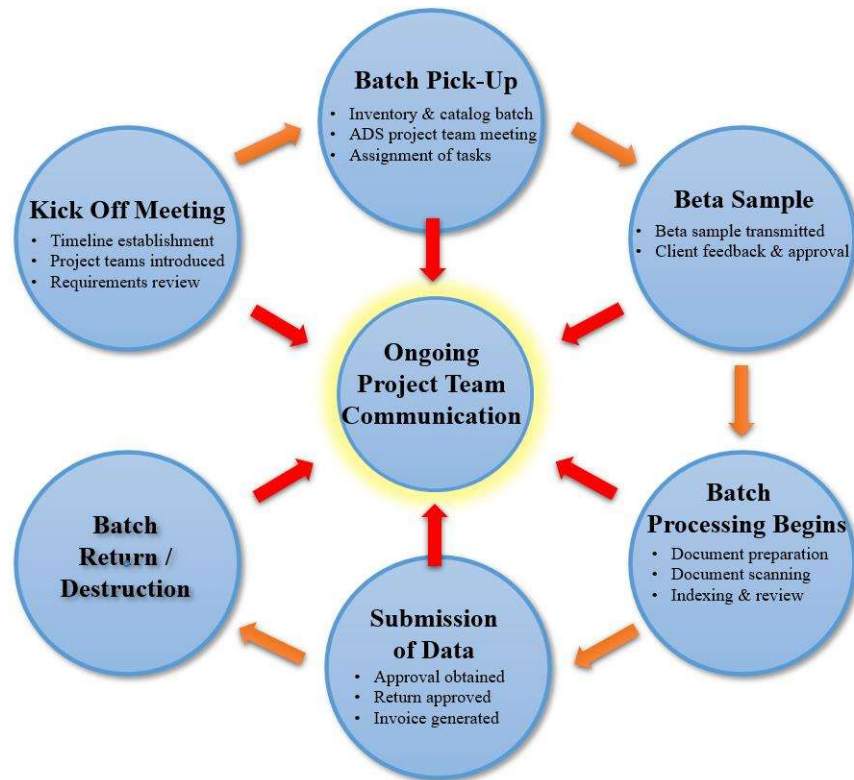
This Electronic Record Keeping Requirement relates to the adherence to the Florida Administrative code and the International Organization for Standardization (ISO).

4.2.2 Provide experience and understanding under Rule 1B-26.003 of the Florida Administrative code.

- ✓ **Satisfied. We have worked closely with the Florida Department of State (FDOS) since 1999, our inception. Since our company serves mostly Florida government agencies, we remain abreast of all changes and requirements related to the information governance. Our President, Melody Engle has served as a “key-note” speaker / records expert at FDOS records management conferences in the past. Our Vice President, John Civile, has been a Florida Certified Records Manager since 2010. In addition, he has decades of Kodak microfilm process experience in a specialized microform company which was founded in 1984. His company actually processed and created the “roll film” for the City of Fort Lauderdale in the 1980's and 1990's.**

4.2.2 Provide your understanding of the City's needs, goals & objectives as they relate to the document & media scanning services & your overall approach to accomplishing the project. Give an overview on your experience with Laserfiche Rio 10.0, proposed vision, ideas, and methodology and timelines. Describe your proposed approach to the project.

Our approach is simple and depicted below. It should be noted that we take a department and document-specific type of approach to each batch of records. We then apply our approach to individual batches to ensure unique requirements, deliverables and deadlines are satisfied.



Kick-Off Meeting

During the preliminary stage of project inception, a kick-off meeting will be scheduled with critical project team leaders from both ADS and your staff. During the meeting, items for discussion will include departmental timelines, record confidentiality, privacy considerations, file type, format and index requirements and overall expectations. Sample documents will be obtained to begin the beta testing phase of the project.

Month	Description	Labor Hours
April	Kick Off Meeting, Client Discovery, Box and Document Type Examination and Determination, Indexing and Metadata Determinations, Work Plan Outline Produced and General Timeline Agreement	12
April - May	Beta Testing and Proof of Concept for Sample Records	44
May - July	Conversion Project Completed for 50 Box Project / Development Services Office, Ongoing User Training	200

Proof of Concept and Beta Testing

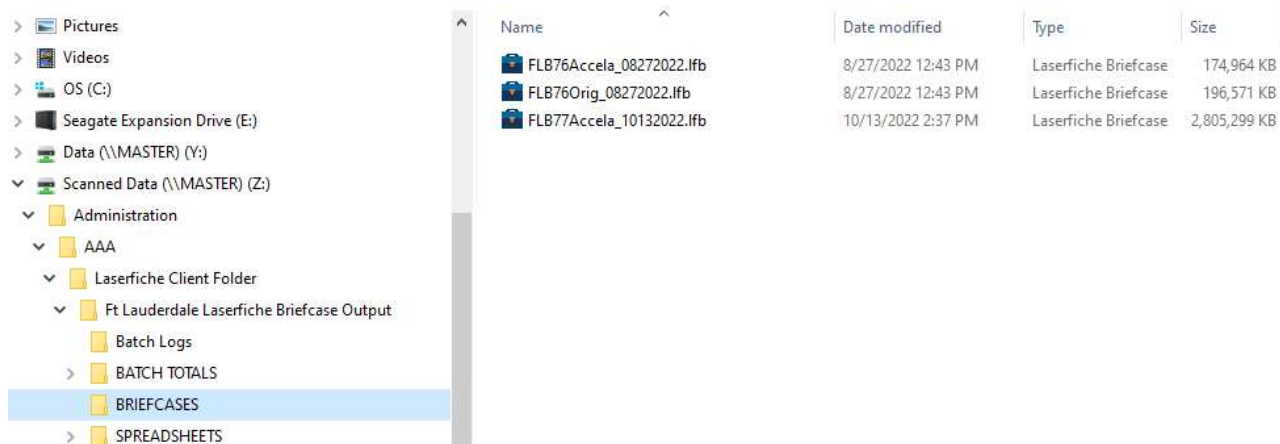
We begin projects by processing a sample batch of records for your review. This “Proof of Concept or Beta Testing” phase helps to ensure we meet your specific project requirements and eliminate misunderstandings. During this phase, we process a small batch of your records and provide you with source files and related index data. The data is then uploaded into your records management system for review. If there are any required changes, we are then able to make any necessary modifications prior to project commencement. Once your staff approves our file format, indexing scheme and upload sequence, full conversion will transpire.

Laserfiche Specific Experience

The City requires specific experience as it relates to its Laserfiche RIO records management environment. As demonstrated throughout our response, we have extensive experience with Laserfiche and are legally licensed to provide conversion services within our company-owned Laserfiche software. This is a separate license only obtainable from Laserfiche corporate.

We are a full service Laserfiche reseller and have many enterprise-wide installations which include design, implementation and training. Our technicians have passed many levels of Laserfiche certifications which include but not limited to template design and complex workflows.

The below graphic depicts recent briefcases and batches process for the COFL. The batches have been designed with department-specific templates as defined by individual needs of your staff.



The screenshot shows a file explorer window with the following directory structure on the left:

- Pictures
- Videos
- OS (C:)
- Seagate Expansion Drive (E:)
- Data (\\MASTER) (Y:)
- Scanned Data (\\MASTER) (Z:)
- Administration
 - AAA
 - Laserfiche Client Folder
 - Ft Lauderdale Laserfiche Briefcase Output
 - Batch Logs
 - BATCH TOTALS
 - BRIEFCASES**
 - SPREADSHEETS

The main pane displays a table of files:

Name	Date modified	Type	Size
FLB76Accela_08272022.lfb	8/27/2022 12:43 PM	Laserfiche Briefcase	174,964 KB
FLB76Orig_08272022.lfb	8/27/2022 12:43 PM	Laserfiche Briefcase	196,571 KB
FLB77Accela_10132022.lfb	10/13/2022 2:37 PM	Laserfiche Briefcase	2,805,299 KB

3.1.3 Project Services Definition and Objective

The services (various departments) are to include pickup, transport, document preparation, scanning, indexing, ultimately record destruction, and media conversion services, (primarily scanning and indexing). The converted images with metadata (tagged tiff images) will be provided in a Laserfiche format (briefcase / volume) appropriate to be imported into the City's Laserfiche environment for record retention purposes. It is the sole responsibility of Proposer to ensure that Proposer's Laserfiche systems are kept up-to-date and can provide a volume that is fully compatible with the Laserfiche version being used by the City at any time.

- ✓ **Satisfied. ADS is a premier reseller of Laserfiche software. We also use the software to manage our company's records "in-house." WE ARE AN END-USER OF LASERFICHE SOFTWARE.** Thus, we are fully licensed and experienced to provide your services in the Laserfiche Format required. We currently have multiple Laserfiche clients including the City of Ft Lauderdale, Village of Pinecrest, City of Coral Gables, Sumter County, City of Estero, City of Clearwater, City of Deerfield Beach, City of Delray Beach, City of Highland Beach, Village of Key Biscayne, Miami-Dade County, City of Miami Springs, City of North Miami Beach, City of North Miami, City of Port Orange, City of South Palm Beach, City of Dania Beach, City of Tamarac, City of Pompano Beach and Oconee County Georgia for which we provide large quantities of data via the Laserfiche Briefcase for both source image capture and metadata / indexing. Our services are all-inclusive. Transportation will be handled by our drivers using owner-occupied cargo vans. As more described within the reference section, we have worked with countless departments within our vast municipal and agency client-base. Since inception, we've converted over 300 million large & small format images.

3.1.4 Service Provisions, Functional and Technical Requirements

Scanning Facilities (Service Center) – Proposer's scanning and indexing facilities must be located within the State of Florida. The service center appointed by Proposer as the one to service the City's scanning and indexing needs shall be the one to scan and index all city documents including microfiche flats, paper or any other format. If at any point in time Proposer needs to transfer City documents (hard copy or electronic format) to another facility or network that is not the one appointed in the RFP response, Proposer will have to obtain prior approval of the respective City department/division and the Information Technology Services (ITS) Department.

- ✓ **Satisfied. We will continue to process your data at our Oldsmar facility (Tampa Bay). We run 2 shifts per day Monday – Friday and another shift each Saturday. Our hours of operation are 5am to 10pm weekdays and Saturday mornings. All work will be performed at this facility.**

3.1.5 Pickup and Turnaround Time

The Proposer will pick up all City documents that are to be scanned and/or have media conversion performed from designated City sites; the City does not encourage subcontracting and requires the Proposer to transport City documents themselves, unless the City determines it to be in their best interest. Only the City will make that determination. The City requires that not only the work be done in an accurate manner but also a timely manner. The City will determine the pickup locations and shall also require the Proposer to pick up on a scheduled or as needed basis of documents to be scanned and/or media conversion services performed. Microfiche flats will be picked up at a minimum of once per week in "as is" condition.

- ✓ **Satisfied. As mentioned above, we will service the City on a bi-weekly rotation. We will continue to provide top-quality services. We do NOT use subcontractors.**

3.1.6 Transport of City Documents

All City documents must be transported in closed, preferably air-conditioned vehicles. If magnetic media is involved, all transport must be placed in magnetic containers within the vehicles.

- ✓ **Satisfied. Our cargo vans are owner-operated, regularly serviced, and air-conditioned. We have magnetic containers, if necessary.**

3.1.7 Document Tracking and Inventory

The Proposer will inventory and acknowledge the receipt of all items received. It is intended that the Proposer will maintain an automated tracking system to allow for the retrieval of any document that is in process. Any discrepancies between the City department's inventory transmittal and the items received by the Proposer are to be resolved within ten (10) working days.

- ✓ **Satisfied. ADS has an extensive automated tracking software system that we developed internally several years ago called WEBFLOW. It tracks every box of records from receipt to disposition through all stages of production. It tracks time spent on each box, by function. It has layers of functionality which are described more fully in the content of our response. We**

believe this system is the best in the industry as it was developed specifically for our service bureau and experienced multiple levels of modification before all departments were 100% satisfied. All projects within ADS are managed through WebFlow.

We maintain a specific records request email address: request@adsus.net which is routed to multiple staff members. Records requests are typically satisfied within 2-4 hours of receipt.

3.1.8 Document Preparation and Quality Assurance of Documents

Preparation is to include all steps to make the documents ready for processing (staple removal, etc). In preparation for scanning, Proposer should recognize the need for special image enhancement or threshold settings or unusual or discolored plans. Improve upon original clarity of difficult scans, identification of bi-tonal or grayscale needs.

After the scanning/media conversion services have been completed, prior to return delivery, the Proposer will be required to perform a final quality control step that compares the final output to the manifest the City provided the Proposer to ensure that every document has been digitized and indexed. The Proposer will be required to provide to the City a report comparing the documents provided to the final output with each product delivery. The City will implement this process in conjunction with the Proposer.

- ✓ **Satisfied. We will continue to provide the above services consistent with the past five years. We will provide exception reports as compared to box and rack logs to accompany invoices and certificates of destruction. Please refer to our response document which details our “perfect page” software and image enhancement options. Detailed quality control procedures are included within the body of our response, specifically Section 4.**

3.1.9 Image Processing / Quality Requirements

The city has extensively provided requirements within this section to include scanning options (B&W, grayscale, bi-tonal, color) to achieve high quality images. Documents should be scanned at 300 dpi or higher and must utilize deskew, black border removal, punch hole filter, image enhancement, noise reduction, rotation, blank page deletion and image smoothing. This should include large format scans. The ordering of records should be maintained and the vendor must have the ability to produce PDF Image Only, PDF/A or PDF Searchable images in accordance with ISO standards. Illegible images should be reported to the City. Detailed requirements for QUALITY CONTROL, DRAWINGS / PLANS, MULTIPLE PAGE DOCUMENTS, IMAGE FILES AND INDEXING, RECORDS ACCESSIBILITY, CONFIDENTIALITY, ACCURACY AND SECURITY OF DOCUMENTATION, HARD COPY STORAGE and RECORDS DESTRUCTION are also defined.

- ✓ **Satisfied. We will continue to provide the highest level of quality control, service, and records security in our sector. Site visits are welcomed and encouraged. Detailed Image Processing / Quality Requirements are included within the body of our response, specifically Section 4 where we have detailed and illustrated the capabilities of Kodak Capture Pro software (our processing software) and Perfect Page capabilities.**

3.1.10 All City Departments – Specific Service Provisions

Proposer is expected to enter into work arrangements (including timeframes, costs, document handling, document ordering, batch organization, file format, document return / destruction, indexing / metadata, Laserfiche briefcases, TIFF standards, recordkeeping requirements, retention periods & other) with individual departments, with the departments submitting individual purchase orders for service under this Contract & to tailor services to meet department needs. The minimum acceptable service level for Services is a minimum of 1 work week & a maximum of four work weeks from the time the work is received by Proposer.

Service Organization Controls. The Contactor should provide a current SSAE 18, SOC 2, Type I report with their proposal. Awarded Proposer will be required to provide an SSAE 18, SOC 2, Type II report annually during the term of this contract. If the Proposer cannot provide the SSAE 18, SOC 2, Type I report at time of proposal submittal, a current SOC 3 report will be accepted.

- ✓ **Satisfied. Within the Reference Section 6 of our response, we have detailed our services to countless municipal clients and their related departments basically on an enterprise-wide level. Within Section 4 of our response, we have dedicated several pages of information related to our Kodak & Next Image software to include technical information regarding file output & other matters. In Paragraph 3.1.2, we addressed our familiarity with Florida recordkeeping requirements & our related expertise. See Section 8 for our SOC 3 report.**

3.1.11 Preliminary Production Test – Sample Requirement

The City shall require a sample of scanned images with metadata, in the appropriate Laserfiche format for importing into the City's Laserfiche environment, from the short-listed Proposers as part of the evaluation criteria for the award. Proposers shall produce the sample work from City selected documents including all media types. These samples and originally supplied documents shall be returned to the City's Departmental Project Liaison within five (5) working days of receipt for examination and approval. If the samples from the short-listed Proposers fail to meet the City's requirements, the City will then request from the next three highest rated responsible Proposers and so on until an approved satisfactory award can be made. The City will retain the samples as the standard of quality to be provided by the successful records Proposer throughout the contract period. The City may also provide the batch configuration for this test.

- ✓ **Satisfied. We agree to full compliance with this requirement.**

3.1.12 General Condition of Documents / Inspection Responsibility

It is the Proposers' responsibility to inspect the condition of the original Building Services Division & Urban Design & Planning Division's general records & associated documents prior to submitting a bid. The Development Services Department is located at 700 NW 19th Avenue. All Proposers are encouraged to inspect the documents. Proposers are required to contact Floyd Brock to request & arrange an appointment to inspect the documents. Inspections will be allowed up to 3 days prior to the solicitation closing. By submitting a proposal, the Proposer certifies that he/she is aware of the general condition of documents to be scanned & converted & that submission of a proposal is acknowledgement that they have familiarized themselves with those conditions

- ✓ **Satisfied. Even as the incumbent vendor, we inspected the documents at your facility on October 13th. We did so to ensure our familiarity with your backlog and to provide us insight as to the remaining age, record quality and document types. To our knowledge, the other vendors had not performed such inspection.**

Section 3 – Experience, Qualifications and Past Performance

Experience, Qualifications and Past Performance	25%	☒
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4.2.3 Indicate the firm’s number of years of experience in providing document and media scanning services

4.2.3 Submit an executive summary that identifies the business entity and its background. Identify the officers, principals, supervisory staff, and key individuals who will be directly involved with the work and their office locations. *The executive summary should also summarize the key elements of the proposal.*

Executive Summary

ADS formed in 1999 to provide document imaging systems and services to our client base throughout Florida. Our service bureau converts millions of standard paper, large format drawings and microformed documents monthly to digital images. Our experience has given us “hands on” interaction with many departments within a variety of organizational structures. Through our specialization, we became a leading systems integrator with unique specialization in departmental workflow, document lifecycles, records retention guidelines and best practices.

Our qualifications will be well documented throughout our proposal. Clearly, we specialize in the conversion of records defined in your initiative. We have extensive experience with the import of millions of image and metadata files into the Laserfiche platform. In addition, we have implementation and support experience with our Laserfiche systems clients as a premier value-added reseller.

We handle the import of thousands of electronic images and metadata into client-specific software applications daily. We are critical in the design and implementation of department-specific workflows, folder structures, templates, and group assignments. If selected as your continued solution provider, we stand ready to perform in accordance with the requirements of the contract and the terms and conditions set forth in this RFP.

With a client-based focus on State and Local government, ADS has provided electronic document management solutions to countless entities with records management needs and documentation similar, if not identical, to yours. Since 1999, this is what we do and who we are. We have worked directly with numerous municipalities and agencies completing huge back-file conversion projects, system implementations, web hosting and on-going records management needs. Our operations facilities are in Oldsmar, Florida (Tampa Bay), Dallas, Georgia (Metro Atlanta) and Miami.

Our primary focus is the conversion of microfilm, standard paper, and large-format drawings to digital images. We have over 23 years of experience integrating and interfacing millions of source-image and index files into countless document imaging systems including Laserfiche. Within section 3.1.3 we list over a dozen municipalities for which we provide conversion services via briefcase into Laserfiche systems that we have either designed or assisted in design.

We have serviced countless multi-year contracts during our 23 years of municipal records management expertise.

We operate two shifts, five days per week plus a Saturday morning shift. We provide records management services for over 200 municipalities.

Our headcount is approximately 35 and is dependent on current project requirements. Most key employees have been with the company for years and our retention rate is high. We work in a strong team environment both internally and externally always inclusive of client project team personnel. We believe these relationships are directly responsible for the success we have with each-and-every records management project. Our operational structure is divided among three major service divisions within two different industries.

- Paper Records Conversion Services (Small Format Documents and Large Format Prints)
- Microfilm and Microfiche Conversion Services
- Records Management & Document Imaging Systems Implementations

Key Elements of Our Proposal

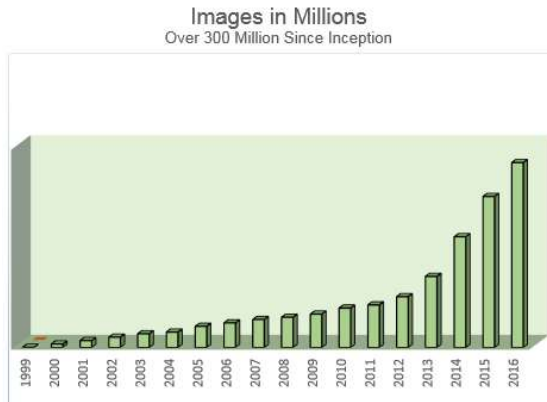
The key elements of our proposal include our references, qualifications, volume capabilities and our internally developed project management software, **WebFlow**.

- ✓ We have listed multiple references which have project and volume specifications similar, if not identical, to the City of Fort Lauderdale. A significant number of our current clients also utilize Laserfiche software for their records management needs. We are not only a reseller of Laserfiche software, but also, an end-user. We utilize Laserfiche daily in much the same way as our system-implemented and end-user clients including the City of Fort Lauderdale.
- ✓ We have provided detailed resumes for key ADS personnel which have 126+ years of combined records management experience. Our Vice President has been a Florida Certified Records Manager since 2010.
- ✓ Conversion volumes have been listed within each provided reference. However, we estimate we've converted over 300 million files since inception.
- ✓ Lastly, our internally developed project management software, WebFlow, is one of the major reasons for our success in meeting client deadlines and tracking project statuses. We have detailed and depicted WebFlow in great detail within Section 3 of our response.

ADS is a premier reseller of Laserfiche software. We also use the software to manage our company's records "in-house." WE ARE AN END-USER OF LASERFICHE SOFTWARE. Thus, we are fully licensed and experienced to provide your services in the Laserfiche RIO format required. We currently have multiple Laserfiche clients including the City of Ft Lauderdale, Village of Pinecrest, City of Coral Gables, Sumter County, City of Estero, City of Clearwater, City of Deerfield Beach, City of Delray Beach, City of Highland Beach, Village of Key Biscayne, Miami-Dade County, City of Miami Springs, City of North Miami Beach, City of North Miami, City of Port Orange, City of South Palm Beach, City of Dania Beach, City of Tamarac, City of Pompano Beach and Oconee County Georgia for which we provide large quantities of data via the Laserfiche Briefcase for both source image capture and metadata / indexing. Our services are all-inclusive. Transportation will be handled by our drivers using owner-occupied cargo vans. As more described within the reference section, we have worked with countless departments within our vast municipal and agency client-base. Since inception, we've converted over 300 million images.

Unique Qualifications

We have the **strongest** expertise in document imaging in the Southeastern United States focused primarily on one market: State & Local Government. As mentioned previously, we have passed a rigorous RFP process with the Department of Management Services initially downscaling State Contract vendors from over 600 to 125.



ADS has converted over 300-Million images.

No other local company has industry specialization in paper records conversion achieving the volumes that we can support.

Since inception, we have serviced over 200 government clients including, but not limited to State Agencies, Local Agencies, Counties and Cities.

Additional Facts

- We scan over **200 tons** of paper records to digital format annually.
- We support various software systems including Laserfiche, FileNet, Hummingbird, On-Base, SharePoint, Kodak Capture Pro, OpenText and more.
- Our technology partners are an extension of our company and reputation.
- We own ALL our equipment and do not subcontract any conversion services.
- Our primary service is the conversion of paper and microform records for city and county government offices. We specialize in building and growth management records but have also worked with dozens of other departments including Police, City and County Clerk, Human Resources, Finance, Public Works, Planning and Zoning, Engineering, Public Defender and many others. Our contracts typically extend to all departments within a city or county.
- Our Georgia location served a government client base for over five years. We own and operate our headquarters from our 9,000 SF building in Florida (Tampa Bay). Our buildings are owned, not rented or leased. As such, we are in full control of our security measures and can satisfy client-specific requirements on demand.
- All equipment is owned, not leased. The company maintains a very high credit rating and has strong relationships with software and equipment vendors. We are in good standing with Kodak, Fujitsu, Contex and LASERFICHE with available credit to have immediate shipment of new equipment and software with basically no financial limitations.

Our company's Operations Manager (Project Team Leader), Kay McNeil will manage this phase through "hands on" involvement of conversion and data transmission. The company's principal owner, Melody Engle, will also be involved with project management through your conversion lifecycle. Kay and Melody have worked together successfully for 19 years. Our conversion staff has been with us, on average, for at least five years individually. All staff routinely work on similar government conversion projects on a daily basis. We have 35 employees in our service bureaus most of which are cross trained in various capacities.

Your Project Team

Team Member	Project Responsibilities	Location / Current Assignments	Unique Qualifications
Melody Engle, Principal Florida Office Working President & CEO 33 Years' Experience 23 Years at ADS	Project Management Production Schedule and Budget On-Site Survey / Kick-Off Meeting Hands-On / Ongoing Client Involvement	Georgia Office / Florida Offices Finalizing GSA Contract Ft Lauderdale Implementation Atlanta Aviation / Ongoing SOC Compliance	Founder and Hands-On Working President of ADS / 1999 - Present CPA / PricewaterhouseCoopers Audit Manager / 1990-1996, Implemented Firmwide paperless audit system / Train-the-Trainer
Kay McNeil Florida Office Project Manager / Team Leader 37 Years' Experience 19 Years at ADS	Project Design & Implementation Taxonomy Beta Testing & File Transmissions Proof of Concept / Client Acceptance Completeness Checks: Source Images/Metadata Overall Project Management	Georgia Office / Florida Offices Ft Lauderdale Implementation Atlanta Aviation / Ongoing Internal Software Migration SOC Compliance	37 Years of City, County & State government experience in software development and data collection / integration 19 Years ADS Operations Manager Laserfiche Certifications
John Civalie, FCRM Florida Office Vice President of Sales 38 Years' Experience	Policy and Procedure Development State Government Business Dev Ongoing Client Communication Estimating and Budget (independent)	Georgia Office / Florida Offices Finalizing GSA Contract Company Expansion / Mergers & Acquisitions	38 Years of City, County & State government records management and conversion experience. Florida Certified Records Manager
James Watt Florida Office Information Technology Director 23 Years' Experience 21 Years' Experience at ADS	Network Design and Configuration Implementation / Ongoing Support of Security Practices	Georgia Office / Florida Offices Network Management Information Technology Security SOC Compliance	High level CISO Certifications High level Microsoft Certifications Project Management Expertise

MELODY S. ENGLE, CPA**EMAIL**

mengle@adsus.net

GENERAL

Date of Birth: 1964

Place of Birth: Miami, Florida

COMMUNITY

ADS has donated over 61,000 pounds of turkey to our key charity
Metropolitan Ministries
Homebound Meals /
Heritage United Methodist
Disaster Relief Efforts

ADVANCED DATA SOLUTIONS, INC.
CHIEF EXECUTIVE OFFICER / PRESIDENT
WORK EXPERIENCE**Advanced Data Solutions, Inc.**

March 1999 - present

She is the original founder of ADS having direct involvement in all system installations & outsourced imaging directives. She is heavily involved in the database management and workflow of all client engagements. She has been involved in document imaging and the evolution of Florida Municipal Electronic Recordkeeping since 1999.

Able Body Labor – 15 Corporations

Chief Financial Officer 1996 - 1999

Management supervision of the Finance & Information Technology Departments. Implementation of EDMS system managing 10 million records annually.

PricewaterhouseCoopers

Audit Manager 1990 - 1996

Managed the audit process for clients in the financial services and manufacturing industries. In addition, she worked in the firm's national office, developing advanced audit training materials used in local/national continuing professional education programs. She was a team leader for the training & implementation of the paperless audit workflow environment for the SE United States. Due to the success of the project, the firm was able to reduce audit paper retention by 95%.

PROFESSIONAL SKILLS

- Certified Public Accountant / Strong Focus on Systems Documentation and Internal Controls
- Laserfiche Certified Records Management – Specialist
- Certified Kodak Capture Pro Imaging Product Specialist
- Certified Document Imaging Architect - Pending
- Certified Records Manager - Pending
- Training: Fujitsu, Kodak, Mekel, Wicks & Wilson, Context, Alchemy and Liberty EDMS Workflow Products

KAY B. McNEIL



EMAIL

kmcneil@adsus.net

GENERAL

Date of Birth: 1956

Place of Birth: Willow Springs, MO

COMMUNITY

Metropolitan Ministries

Disaster Relief Efforts

U.S. Figure Skating / Volunteer

ADVANCED DATA SOLUTIONS, INC. OPERATIONS MANAGER

WORK EXPERIENCE

Advanced Data Solutions, Inc.

2002 - present

Kay is responsible for the overall workflow and management of operations. She manages department / project leaders. **Her primary responsibility relates to client metadata: ensuring detailed accuracy of index & image files.** Her scope of responsibility includes ensuring adherence to deadlines, developing & enforcing production schedules, & maximizing workflow & efficiency. She works directly in day-to-day operations with both ADS staff & client representatives to ensure the timely production of work.

Siemens-Nixdorf Computer Corp.

Systems Analyst/Project Manager 1986 - 1995

Kay worked exclusively in the Government Division of Siemens. The client base included Fire & Sheriff Departments, Probation Offices, Clerk of Courts, Property Appraisers and Tax Collectors throughout the United States. Her duties not only included Project Management, but Systems Analysis and Design, Programming, Sales Support, RFP responses, and technical writing of Hardware, Software, and User Manuals.

Specific Projects included the design & implementation of 200 Independent Kiosks for Fee Collection of various Broward County Clerk of Courts offices and related services. Subsequent to her departure, a similar system was designed for Miami-Dade County Clerk of Courts. In addition, she was involved in the programming of the company's first EDMS system.

PROFESSIONAL SKILLS

- Strong Focus on Systems Documentation and Project Management
- Laserfiche Certified Records Management – Specialist
- Certified Kodak Capture Pro Imaging Product Specialist
- Certified Document Imaging Architect – Pending
- Training: Fujitsu, Kodak, Mekel, Wicks & Wilson, Contex, Alchemy and Liberty EDMS Workflow Products

JOHN CIVALE**PHONE**

954-553-4009

EMAIL

jcivale@adsus.net

ADDRESS

141 Scarlet Blvd,
Oldsmar, Florida 34677

GENERAL

Date of Birth: 10/17/1962

Place of Birth: NYC

COMMUNITY

Troop Leader - Boy Scouts of America
Hurricane Andrew Relief Efforts
Town of Davie - Baseball and Soccer
Coach.

Advanced Data Solutions

VICE PRESIDENT OF SALES

WORK EXPERIENCE**Advanced Data Solutions***July 2017 - present*

John joined ADS in July 2017 as Vice President of Sales with over 38 years in the Document Management Industry. He possesses a wealth of sales and operational experience and knowledge in document scanning and micrographic service technologies. John is a FCRM, Florida Certified Records Manager.

DRS Imaging*June 2008 – June 2017*

John joined the DRS Group in June 2008 as Senior VP of Business Development with over 29 years in the Document Management Industry.

HOV Systems / Lason Services*General Manager 1997-2008*

General Manager overseeing Operations and Sales. John closed millions in sales and grew the base of accounts through hard work and the knowledge of the document imaging industry.

American Micro-Image, Inc.*Vice President 1984-1997*

As Vice President John was responsible for the daily operations and increasing revenue by 145% in 5 years. John has also added new products and services.

PROFESSIONAL SKILLS

- FCRM (Florida Certified Records Manager)
- Certified Document Imaging Architect (pending)
- Kodak Capture Pro Imaging Products
- Laserfiche Document Management Products
- Context and Kip Large Format Scanners
- ScanOS Large Format Software Capture
- WideImage Large Format Software Capture
- Wicks & Wilson SCANfilm Conversion Hardware/Software
- High Speed Fujitsu/Kodak/Canon Production Scanners

JAMES M. WATT**PHONE**

813-855-3545

EMAIL

jwatt@adsus.net

ADDRESS141 Scarlet Boulevard
Oldsmar, FL 34677**GENERAL**Date of Birth: 1971
Place of Birth: New York**COMMUNITY**Pinellas County Sherriff - Ride
and Run with the Stars
Girl Scouts
Lokey Charities**ADVANCED DATA SOLUTIONS, INC.
SENIOR NETWORK ENGINEER****WORK EXPERIENCE****Advanced Data Solutions, Inc.***April 2000 - present*

Jim has designed, implemented and supported a wide array of business IT solutions including mobile workforce automation, remote access, network security, email and groupware solutions, network wide threat assessments, project management and many other business technology solutions for ADS.

Connelly Insurance Group*IT Specialist 1998 - present*

Jim is the IT specialist for The Connelly Insurance Agency (CIG). With CIG, he designs, implements and supports an array of automation projects for the agency, which includes an agency-wide scanning and document management system, direct to the desktop network fax solution and Citrix Metaframe remote access system and other Agency Automation projects.

MOON Communications*IT Specialist 1996 - 1998*

Before joining CIG, Jim Watt designed, implemented and supported the LAN/WAN infrastructure for MOON Communications. It supported patient medical records with security and fault tolerance in mind, implemented MOON's main computer room consisting of DEC Alpha 4100 servers with DEC Storage Works.

PROFESSIONAL SKILLS

- Cisco Certified Meraki Network Administrator
- Cisco CCNA
- Microsoft MCSE
- Digium dSSE
- Apple ACTC
- SonicWall CSSA

4.2.3 Provide details of past projects for agencies of similar size and scope, including information on your firm's ability to meet time and budget requirements.

Past Projects

Each of the below projects have client-driven delivery requirements. At project inception, we have a kick-off meeting where we discuss deadlines and anything unique that might require special urgency. **These matters are defined within their timelines.** We operate one-two shifts in our service bureaus based on production requirements. **Every municipal client is billed based on defined purchase orders within each budget year. Some clients are on a rotational schedule, such as the City of Coral Gables (bi-weekly) and Collier County (monthly).**

Pompano Beach / Document Imaging, Microform and LASERFICHE Implementation

ADS began converting small and large format documents for the City during 2002. In 2010, we began the back-file conversion of millions of microformed images & data input resulted in concise data management & drastically improved record retrieval times. We converted nearly 1 million images from the City's microfiche library and tagged files with appropriate metadata. This project was completed in eighteen months.

Paper scanning services are ongoing citywide. We work with various departments including city clerk, police, finance, public works and others, but focus primarily on Growth Management. We convert building permit files consisting of a multitude of small documents and large format prints. To date, we have converted over 3 million small format documents and 250 thousand large format prints.

During 2003, we implemented a document imaging system within the City Clerk's office. This system grew to 45 users. The system managed paper records spanning 50 years and simplified public records requests. We established multiple databases (Folder structures, indexing schemes, password security, drop-down menus, search routines, and extensive OCR).

During 2015 / Current, we migrated the city to a more robust **Laserfiche system** in a citywide deployment that included all the above plus the development and design of several extensive workflows and forms processing routines. To date, we have installed 186 users and have written and supported many custom workflow routines.

City of Coral Gables / Document Imaging Services & Laserfiche Briefcases

ADS began converting small and large format documents for the City during 2021 to current. Since that time, we have converted small and large format documents for Development Services, Public Works, Historical, Police, Legal, Human Resources and Historical. All records are imported into the City's Laserfiche using Laserfiche briefcases designed for specific document types. Data is extracted from the City's permitting system into batch-specific excel files. Data from the files is used for a custom Laserfiche workflow which populates metadata into index fields designed by both ADS and the City. Services are ongoing. We have converted nearly 1 million small format pages and 132,000 large format prints and millions of metadata entries for the city. In addition, we have converted 15,000 microfiche images & 424,000 microfilm images.

City of Coral Gables is on a bi-weekly rotation schedule for conversion services. We typically complete each batch within a few days of pick-up. **ADS is proposing we schedule a similar rotation with the City of Ft Lauderdale.**

City of Clearwater / Document Imaging Services & Laserfiche Briefcases

ADS began converting small and large format documents for the City during 2010 to current. Since that time, we have converted tens of thousands of small and large format documents primarily for Development Services. All records are imported into the City's Laserfiche system using Laserfiche briefcases designed for specific document types. Data is extracted from the City's permitting system into batch-specific excel files. Data from the files is used for a custom Laserfiche workflow which populates metadata into index fields designed by both ADS and the City. Services are ongoing.

City of Tamarac / Document Imaging Services & Laserfiche Briefcases

ADS began converting small and large format documents for the City during 2018 to current. Since that time, we have converted nearly 1 million small and large format documents for multiple city departments. All records are imported into the City's Laserfiche system using Laserfiche briefcases designed for specific document types. Metadata is manually captured from client logs and folder descriptions. The metadata is then used for a custom Laserfiche workflow which populates metadata into index fields designed by both ADS and the City. Services are ongoing.

Since inception, we have converted records for over 150 Florida Cities. Other references are available upon request.

County Government

Through the years, we have performed services for dozens of County Government offices. Below is a short list.

Fulton County	Oconee County
Paulding County	Broward County
Hillsborough County	Miami-Dade County
Martin County	Monroe County
Sarasota County	Orange County
Seminole County	Okeechobee County
Santa Rosa County	Alachua County
Pasco County	Polk County
Clay County	Palm Beach County

We have been providing services for most of our clients for years. It is extremely rare for ADS to fulfill a back-file conversion project and not be asked to continue as the service provider. In those cases, there are either no more records to convert or the client assumes this task "in-house."

We earn the relationship, not just the project.

It is a fair statement to say that our clients do not view ADS as just a vendor, but rather an extension of their conversion team. Our job is to make these efforts as seamless and painless as possible. Those who work with us directly have full confidence that we dedicate all resources and efforts to satisfying client needs as quickly as possible.

We just try harder.



FISCAL AND ADMINISTRATION DIVISION
ANETA J. DUHIGG, SENIOR BUSINESS SYSTEMS ANALYST
201 South Rosalind Avenue Orlando, Florida 32801
407-836-5873

March 15, 2021|

To Whom It May Concern:

Advanced Data Solutions, Inc. has been providing our conversion services since 2004.

This company is truly magnificent. They work on very short deadlines and deliver complete and quality images / metadata. Their work is done right and if there are any mistakes they correct them with a smile. It is a pleasure to work with Kay and Melody.

They have converted and indexed millions (approximately 40 million) of Growth Management, Public Works, Environmental Protection and Planning and Zoning paper, large prints, microfilm and microfiche files since the contract began. Most of this work was performed over the last thirteen years.

Thank you,

Aneta J. Duhigg
Senior Business Systems Analyst
DM Administrator



**GROWTH MANAGEMENT DIVISION
DANNY CONDOMINA, SENIOR OPERATIONS ANALYST
3299 Tamiami Trail, Naples, Florida 34112**

March 22, 2021

To Whom It May Concern:

Advanced Data Solutions, Inc. has been providing our conversion services since 2019.

This company does an excellent job. They work on short deadlines and provide biweekly batch images & metadata. The company provides us with detailed exception reports which help us identify any filing or mis-filing issues from thousands of pages monthly. It is a pleasure to work with them.

They have converted and indexed over 2,000,000 small format pages and over 300,000 large format prints since late 2019. In addition, they converted 2 million microfilm images from our archive library.

Sincerely,

Danny Condomina
Senior Operations Analyst

Section 4 – Methods & Resources for Performing Services

Methods & Resources for Performing Services	10%	☒
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4.2.4 Procedures for tracking inventory once they are picked up from your customers.

ADS Web Flow / Project Management

At ADS, our focus is on quality services and effective project management. By creating our own project management software (ADS WebFlow) and managing our labor costs, we operate in a streamlined environment that considers revenue, margins, and overhead rates in day-to-day operations.

Our primary expense is labor. Through WebFlow, we closely match our billings to our labor costs. We utilize its capabilities for budgeting efforts which include labor time and project billings. WebFlow allows us to accurately track and budget project timelines with all efforts “in-house” so that client deadlines are met or exceeded. WebFlow is described in more detail throughout our proposal response.

No Other Records Conversion Company Has Internally Developed Industry-Specific WEBFLOW PROJECT MANAGEMENT SOFTWARE.



ADS

WebFlow also provides us with information such as detailed and average times per box by function and by employee. This allows us to make production decisions for compliance with client deadlines.

We utilize ADS WebFlow for the tracking and budgetary quality control procedures necessary for an effective workflow. Each batch of records is tracked through their entire lifecycle using this product. We know, at a glance, where each box of each batch of client records is in production / conversion. This helps to expedite records requests (typically within 15 minutes) and to provide client-specific status reports.

Box Name	Status	# SF	# LF	Actions
Box 01	Reviewed	0	0	Modify Delete
Box 02	Reviewed	0	0	Modify Delete
Box 03	Reviewed	0	0	Modify Delete
Box 04	Indexed	0	0	Modify Delete
Box 05	Scanned	0	0	Modify Delete
Box 06	Scanned	0	0	Modify Delete
Box 07	Scanned	0	0	Modify Delete
Box 08	Scanned	0	0	Modify Delete
Box 09	Prepared	0	0	Modify Delete
Box 10	Prepared	0	0	Modify Delete
Box 11	New	0	0	Modify Delete
Box 12	New	0	0	Modify Delete
Box 13	New	0	0	Modify Delete

Each batch of records is tracked from pickup to re-delivery and / client “sign-off” for destruction in our WebFlow program.

We have grown with the industry and have basically established benchmark standards through our direct involvement with the Division of Archives and Department of Management Services. Our policies have been copied and used repeatedly in public records management initiatives throughout the Southeastern United States.

As records are converted and cleared as reviewed, they are marked as such with colored labels on the boxes themselves and within WebFlow. We have depicted box lifecycles in graphics throughout this proposal. Microform data is handled in a similar manner to hard copy records.

This screenshot depicts the initial receipt of Batch 01, picked up on 05/17/21 consisting of 50 boxes. Boxes are tracked through all levels of production.

Box Name	Status	# SF	# LF	Actions
Box 01	New	0	0	Modify Delete
Box 02	New	0	0	Modify Delete
Box 03	New	0	0	Modify Delete
Box 04	New	0	0	Modify Delete
Box 05	New	0	0	Modify Delete
Box 06	New	0	0	Modify Delete
Box 07	New	0	0	Modify Delete
Box 08	New	0	0	Modify Delete
Box 09	New	0	0	Modify Delete
Box 10	New	0	0	Modify Delete

Warehouse Management

The below picture depicts our warehouse and boxes from several clients. They are labeled by owner, batch number and date. This information directly correlates with our pick-up logs and WebFlow. As mentioned previously, WebFlow tracks every record box through all phases of production including return or destruction.



Document Preparation and Best Practices

Document preparation is critical to the success of any paper conversion project. Prepping procedures are determined during Proof of Concept and the Kick-Off meeting. Document types are identified, and many questions are answered. Solid relationships are established, and production timelines are exactly determined. Years of experience has taught us this phase of production is critical to quality and adherence to deadlines.

Each document type has its own specific prepping procedures and documents must be organized in a consistent, user-friendly manner consistent with your current or desired filing system. Our prep staff is determined when project teams are established. They are familiar with your project and ask questions when something appears different or out of the ordinary (missing control sheets, color documents, misfiled records, etc...). The document prep staff remove all the staples, repair any torn documents, emboss any raised seals on both small and large format documents, identify color, faded, and illegible documents, etc... In addition, post-it notes will be relocated to an area on the document where information is not interrupted, otherwise, they will be placed on a blank page immediately preceding the original document. Torn pages will be repaired.

Raised Seals

Legal documents and wide format drawings often contain raised seals. We have set the benchmark and best practice of effectively embossing the seals for proper visibility on scanned images.



Special consideration and control procedures must be established when scanning large and small format records that originate from the same file. These records are scanned on different systems, small format scanners and wide format scanners. Control numbers and identifiers must be used to accurately reunite these records in a digital format. Through years of quality control experience, we have perfected these procedures to insure this occurs. Thus, small format application records and supporting documents are combined digitally with their wide format drawing affiliated records.

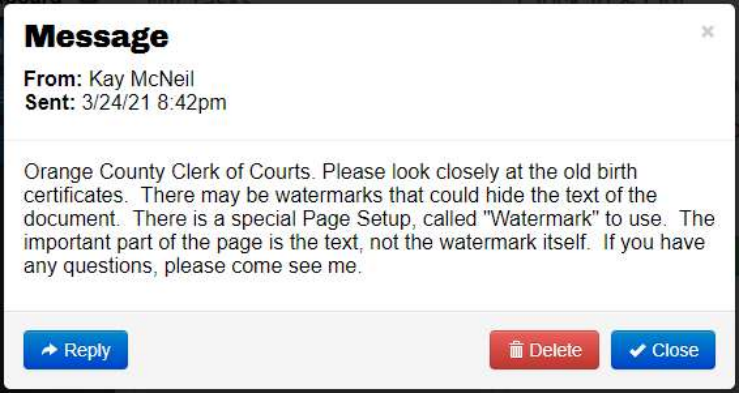
After small and large format record files are reunited and confirmed, control numbers are eliminated such that their original records properties are not affected; and all information is just a digital copy of the historic paper image.

VOID Stamps

Wide format drawings are often voided on the front or back of the sheets. **With client consent**, we will stamp all drawings on the front side as “Void” if the back side is stamped and the front is not. Thus, it is clear to the end-user that the drawing is void while viewing.



Special consideration might be necessary when prepping / scanning certain documents. Often there are watermarks that may distort or hide data on the original / scanned image. In these cases, WebFlow is used for interoffice communications.



Document preppers basically get the records ready for digital conversion. The preparation staff also record a document count for each box on our Preparation Labels which are on the front of each box. These labels contain the date and signature of the person who performed the work. These labels correlate directly to labor performed within WebFlow. **Quality Control. Your box lists / control logs will be verified at various stages, including document preparation.**

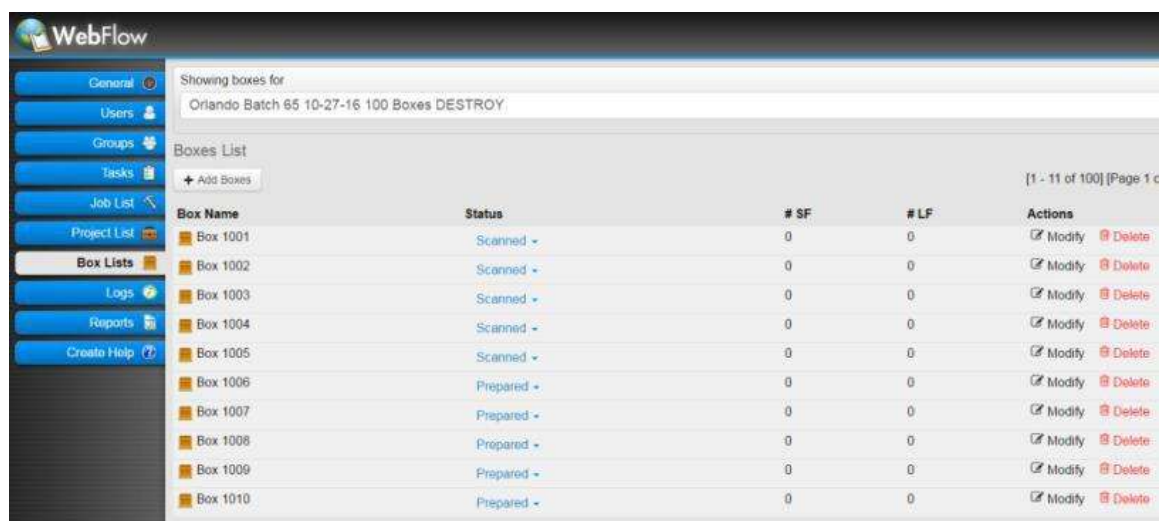
This screenshot depicts that boxes 1001 thru 1010 have been prepared. Through other reports, we can review box preparation times, budget times, average times, and projected completion dates. All boxes are tracked through all levels of production.

Box Name	Status	# SF	# LF	Actions
Box 1001	Prepared	0	0	Modify Delete
Box 1002	Prepared	0	0	Modify Delete
Box 1003	Prepared	0	0	Modify Delete

Document Scanning and Best Practices

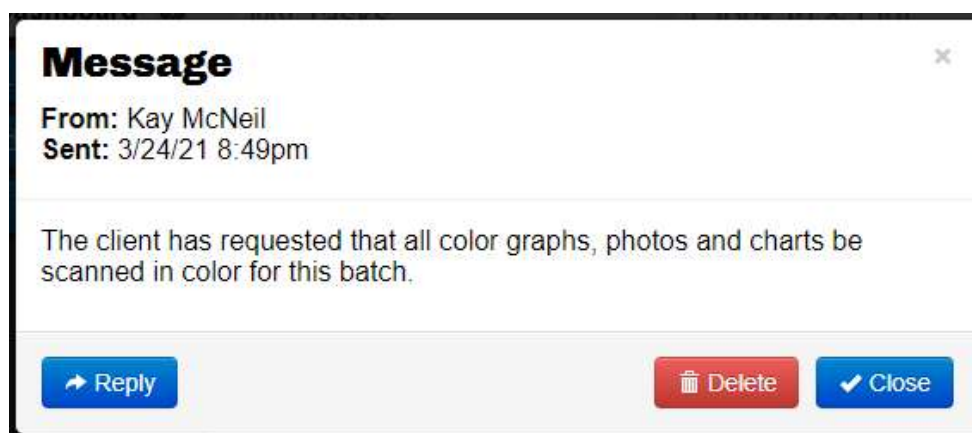
Repeat scan operators will be assigned to your project team. Operators serve to review the images and output independently for completeness and image quality. After each box is scanned, confirmation of the document count is made with the Control Log / List and the Preparation Label. Discrepancies, if any, are resolved immediately.

This screenshot depicts boxes 1001 thru 1010 have been partially prepared and scanned. All boxes are tracked through all levels of production.



Box Name	Status	# SF	# LF	Actions
Box 1001	Scanned	0	0	Modify Delete
Box 1002	Scanned	0	0	Modify Delete
Box 1003	Scanned	0	0	Modify Delete
Box 1004	Scanned	0	0	Modify Delete
Box 1005	Scanned	0	0	Modify Delete
Box 1006	Prepared	0	0	Modify Delete
Box 1007	Prepared	0	0	Modify Delete
Box 1008	Prepared	0	0	Modify Delete
Box 1009	Prepared	0	0	Modify Delete
Box 1010	Prepared	0	0	Modify Delete

As you can see below, scan operators may have messages sent by a project manager or teammate. Our program prohibits job commencement until all related messages have been read. They are only eligible for deletion after they have been read. In addition, our program is the source for our ADP payroll. Thus, credit for work can only be obtained when notes are read, and projects are logged for performance.



4.2.4 Provide a list of equipment proposer uses for Scanning and Media Conversion from Microfiche flats to Scanned Images. Include the make and model number of the equipment, how many of each and also the current version of scanning software being utilized. Also, explain your process of creating tagged TIFF images, performing indexing, and quality control process.

Qty	Description
2	Contex HD 4250 Large Format Scanner – Black & White (B&W), Grayscale & Color Scanning Capabilities / ScanOS Software
1	Contex HD 5450 Large Format Scanner – Black & White (B&W), Grayscale & Color Scanning Capabilities / ScanOS Software
1	Contex IQ Quattro 4400 Large Format Scanner – Black & White (B&W), Grayscale & Color Scanning Capabilities / ScanOS Software
1	KIP 40 Plus Large Format Scanner – B&W, Grayscale & Color Scanning Capabilities – ScanClient Software – Version 2.0.0.16
3	Kodak i4200 – 120 Page Per Minute (PPM) Scanner / 240 Page Per Minute (PPM) Duplex Capability / B&W & Grayscale Scanning Capabilities / Scans Up to Ledger (11" x 17") Size – Kodak CapturePro Software
4	Kodak i3400 – 120 Page Per Minute (PPM) Scanner / 240 Page Per Minute (PPM) Duplex Capability / B&W & Grayscale Scanning Capabilities / Scans Up to Ledger (11" x 17") Size – Kodak CapturePro Software
1	Fujitsu fi6800 – 130 PPM Scanner / 260 PPM Duplex Capability / B&W & Grayscale Scanning Capabilities / Scans Up to Ledger (11" x 17") Size
1	Fujitsu fi6670 – 70 PPM Scanner / 260 PPM Duplex Capability / B&W & Grayscale Scanning Capabilities / Scans Up to Ledger (11" x 17") Size
1	Fujitsu FI5900C – 120 PPM Scanner / B&W, Grayscale and Color Capabilities / Scans Up to Leger (11" x 17") Size
6	Fujitsu FI-5650C / 5750 – 57 PPM Scanner / 114 PPM Duplex Capability / B&W, Color & Grayscale Scanning Capabilities / Scans Up to Ledger (11" x 17") Size
1	Fujitsu FI-4860C – 60 PPM Scanner / 120 PPM Duplex / B&W, Color & Grayscale Scanning / Scans Up to Ledger (11"x17") Size
6	M4120C – 25 PPM Scanner / 50 PPM Duplex Capability / B&W, Color /Grayscale Scanning Capabilities/ Scans Up to Legal (8.5" x 14") Size
1	Mekel Mach V Microfilm Scanner – Quantum Scan Software / B&W and Grayscale Capabilities / Scans 35mm - 16mm roll film / Group IV tiff images and/or Jpeg files are created automatically during conversion. Other file options available. 100% Image Capture
4	Wicks & Wilson - 4100 Microfilm Scanner / B&W and Grayscale Capabilities / Scans 35mm and 16mm roll film / Group IV tiff images are created automatically during conversion. Other file options can be chosen prior to media conversion.
1	Mekel Mach VII Microfiche Scanners – / B&W and Grayscale Capabilities / Scans 35mm, 16mm, Comm Fiche, Jacketed and unjacketed / Group IV tiff images and/or Jpeg files are created automatically during conversion. Other file options available. 100% Image Capture

4.2.4 Software product and version of scanning/capture tool used, along with types of images are supported (TIFF, CCITT Group 3 & 4, etc.) and the minimum/maximum size of images documents the system can handle

4.2.4 Method(s) used to reduce the size of the file image when performing media conversion from microfiche flats.

Document Scanning Software: Kodak Capture Pro, Version 5.8 (Production Software)

Laserfiche Avante Version 10.4

Wide Format Scanning Software: NextImage Scan & Archive, Version 7.3

Microfilm Conversion Software: Quantum Scan 1.02.22 / Quantum Process 1

We support the following standard image types. Image compression is handled through design set-up within Kodak Capture Pro, NextImage and Quantum Process.

- TIFF
- CCITT Group 3 & 4
- PDF
- PDF / A
- SEARCHABLE PDF
- JPEG
- GRAYSCALE
- 16 & 24 BIT COLOR
- UNCOMPRESSED & COMPRESSED IMAGE FILES

Below is a screenshot example for TIFF setup options among many others system capabilities.

TIFF Setup dialog box

Use this box to process your output in *TIFF* format.

Group by - click the radio button for **Single-page** or **Multi-page** group.

For each - If you select **Multi-page** group, select one of these options from the drop-down list: **Page**, **Document**, or **Batch**.

If your output includes black and white images, the **Black & White compression** option becomes active. Select **Group-4** or **(none)** from the drop-down list.

If your output includes color or *grayscale* images, the **Color/Grayscale compression** and **Color quality** options become available.

- **Color/Grayscale compression** - select **JPEG**, **JPEG (TIFF 6)**, or **(none)**.

- **Color quality** - select one of the following settings from the drop-down list: **Same as scanned**, **Draft**, **Good**, **Better**, **Best**, or **Superior**.

Apply digital signature* - click this checkbox to verify that an image output by Capture Pro Software has remained unaltered from the source document image captured. The free Image Verifier software may be used to verify that a digitally signed image has not been altered at any time. To read about the benefits of image verification and to download the Image Verifier software go to: www.kodakalaris.com/go/CSImageVerify.

OK - closes the dialog box and returns to the [Job Setup dialog box](#).

* This option is not available with Capture Desktop Software.

To return to the Output tab, [click here](#).

To return to the Job Setup dialog box, [click here](#).

Our Kodak document scanners accommodate sizes ranging from tiny receipts to 11" x 17", ledger sized documents. Our Contex Wide-Format scanners accommodate sizes from 4" to 52" in width.

We utilize Kodak and Fujitsu scanners for our document conversion. Kodak Capture Pro Software to Capture, QC, and Index Kodak Production Scanners. Daily Volume: up to 30,000 pages per day Throughput: 100 pages per minute. File Formats: TIFF/Multi-page TIFF, PDF, RTF, TXT, Searchable PDF, PDF-A

Features: Streak filtering, controlled stacking, Perfect Page technology, iThresholding, automatic color detection, autocrop, image edge fill (black or white), aggressive crop, deskew, content-based blank page detection & deletion, multi-color dropout, automatic orientation. Output Resolutions: 100 / 150 / 200 / 240 / 300 / 400 / 600 dpi Compressions: CCITT Group IV; JPEG or uncompressed output. Multi-Feed Detection: Intelligent ultrasonic technology; 3 sensors that work together/ independently.

Laserfiche®
Run Smarter®

CROWLEY

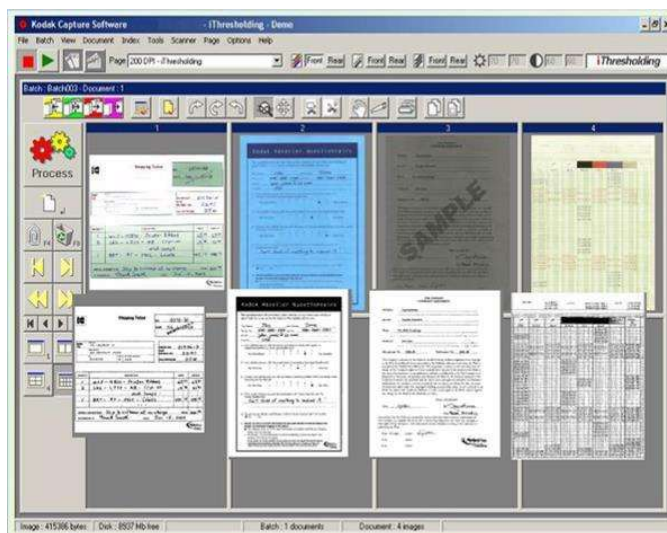
FUJITSU PERSON



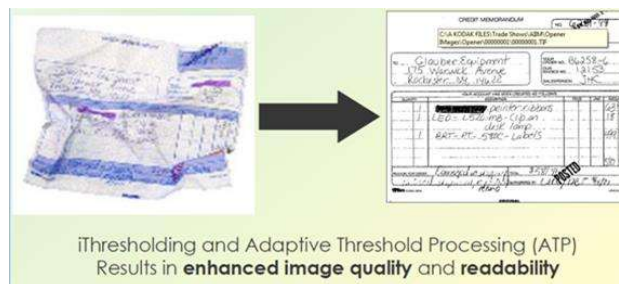
We utilize only the highest quality equipment and software. Our scan operators are tenured and have been with our company for years. All documents will be scanned on both sides and software technology and settings will automatically delete blank back-sided documents. Sonar technology will prevent any double feeds and preparation control counts will ensure completeness as verified by both document scanning and review staff. We will use a high setting to enable three sensors for double feed detection.

Each scan operator is fully trained in our Kodak Perfect Page software which allows for very detailed scanner settings allowing customization for all record types. Despeckle, rotate, deskew are just a few.

The following graphics demonstrate why this results in the best quality possible. They demonstrate the image enhancements available using Kodak Capture Pro software. Although we have other scanning options, we typically use Kodak scanners and software because of the image quality which we feel is superior to other leading scanners and software. We have concluded this through side-by-side comparisons of difficult images such as documents with watermarks, raised seals, thermal fax pages, carbon copies, dot matrix generated documents, faded records and many others.



Kodak's Perfect Page technology and optics provide the best image quality available.



We utilize Kodak and Fujitsu along with Kodak Capture Pro scanning software which is a subset of Kofax VRS (Best Practice within our industry). Our software allows us to output images and metadata to any required client specifications including direct interface with many common records management systems.

Document Capture

Other Capture Considerations

- Page Set-Up Selection
- Network Level Job Set-Ups according to SOW

Page Orientation / Auto Cropping




Automatic Orientation

- Based on document content, **automatically rotates** a scanned image 90, 180, or 270 degrees to its proper legible orientation
- Applied to front and back pages independently
- Handles machine, upper case and lower case characters, including most dot-matrix

Deskew example

Input image



Manual deskew
(Select part of input image and rotate.)



Autocrop+
Deskew
(Crop and rotate.)



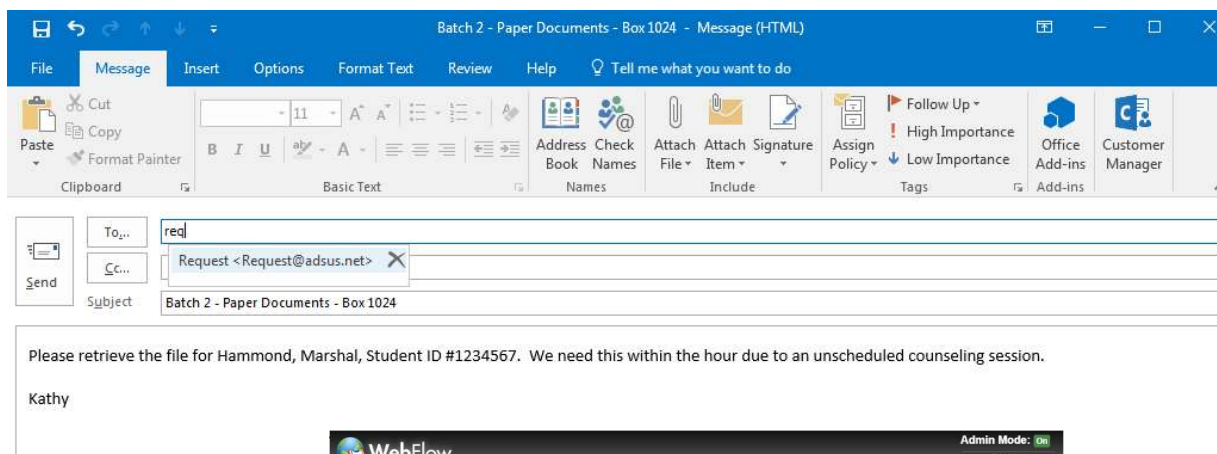
4.2.4 Identify automated tracking system(s) to allow for the retrieval of any document that is in process.

Access to Documents / Records Requests

At project inception and through project lifecycle, we encourage clients to tour our facility and meet all members and levels of our project team. During this meeting, we demonstrate not only the security measures we have implemented, but also our control procedures that protect both the premises and client records. We have an "open door" policy for all our clients such that site visits can be arranged as needed.

Records requests are usually initiated using our request@adsus.net email address that gets routed to six different employees. One person is typically tasked with records requests with a back-up person established, as necessary. Requested files are transmitted via a link to our SFTP site. We will assign a username and password to your designated staff for retrieval.

WebFlow facilitates the quick identification of records by their stage of production. If a box is already scanned, our clients can expect a link to the requested record within minutes. If the file has not yet been scanned, the box is retrieved, and the correct file is converted and electronically sent within 2-4 hours.

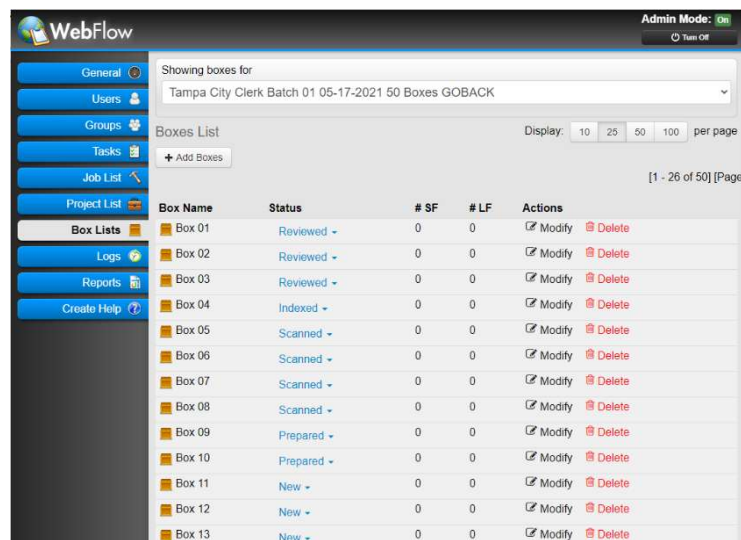


Batch 2 - Paper Documents - Box 1024 - Message (HTML)

To: req
Request <Request@adsus.net>
Subject: Batch 2 - Paper Documents - Box 1024

Please retrieve the file for Hammond, Marshal, Student ID #1234567. We need this within the hour due to an unscheduled counseling session.

Kathy



Box Name	Status	# SF	# LF	Actions
Box 01	Reviewed	0	0	Modify Delete
Box 02	Reviewed	0	0	Modify Delete
Box 03	Reviewed	0	0	Modify Delete
Box 04	Indexed	0	0	Modify Delete
Box 05	Scanned	0	0	Modify Delete
Box 06	Scanned	0	0	Modify Delete
Box 07	Scanned	0	0	Modify Delete
Box 08	Scanned	0	0	Modify Delete
Box 09	Prepared	0	0	Modify Delete
Box 10	Prepared	0	0	Modify Delete
Box 11	New	0	0	Modify Delete
Box 12	New	0	0	Modify Delete
Box 13	New	0	0	Modify Delete

We utilize ADS WebFlow for the tracking and budgetary quality control procedures necessary for an effective workflow. Each batch of records is tracked through their entire lifecycle using this product. We know, at a glance, where each box of each batch of client records is in production / conversion. This helps to expedite records requests and to provide client-specific status reports.

4.2.4 Destruction process including any safeguarding measures and where the documents are sent once shredded

We shred on-site using an outside shredding company that has obtained that industry's highest certifications. Our shredding partner is Secure On-Site Shredding (SOS) aka Shred360. They are bonded and NAID certified. They also have both a GSA contract through US General Services Administration #GS25F0039S and a State Contract through Department of Management Services (DMS) #991-698-14-ACS. SOS has been in business since 1994 and services 34 counties throughout Florida.

Secure On-Site Shredding
Palm Harbor, Florida 34683

General Conditions

Secure On-Site Shredding complies with the following shred size as stated below:

Paper or printed Material shredding must render material unreadable by using a crosscut, pierce and tear, strip cut or pulverize, disintegrator, rotary cut or Hammermill method. End product shred size must meet the following criteria:

Processes

- Cross Cut/Pierce and Tear: $\frac{3}{4}$ inch width (max) x $2\frac{1}{2}$ inch length (max)
- Strip Cut: $\frac{5}{8}$ inch width (max) x length: Indefinite
- Pulverize, Disintegrator or Hammermill: Screen size (max) 2-inch diameter holes, Pulping
- The Shredding vehicle that is currently being utilized for GSA approx. shred size is $\frac{1}{8}$ in x $\frac{1}{2}$ in. The end product is comingled with approximately 10,000 lbs. of shredded material, which is housed in the rear of shredding truck.
- All shredded paper material is baled in preparation for recycling at our facility guaranteeing our clients the utmost security. SOS owns and operates a state of the art baling system. The baled material is then shipped directly to the pulp mill for post-consumer products. A third party recycling facility is in place in case the shredded material cannot be baled at our facility. All baled material is under a numbered locked seal, this guarantees security during shipping to processing mill. Transfer of custody takes place once material is placed in shredding truck for shredding process.

Our warehouse manager supervises all on-site document destruction. Destruction will begin after all appropriate project management signoffs have occurred. This is done with complete client cooperation typically weeks after conversion. The shredding vehicle parks directly in front of our warehouse bay door and shredding occurs with no other vehicles nearby. All boxes are clearly marked and designated for destruction. Certificates of Destruction are issued immediately after records are destroyed.



The City of Fort Lauderdale has requested that batches of records be processed, billed and labeled on Certificates of Destruction individually and not grouped. As such, we have adopted this policy to expedite review and destruction for your management team.

4.2.4 Provide standard turnaround times for various scanning and media conversion requests. The Proposer's response should include day of pickup and delivery; Please use a volume of 20,000 documents (10,000 standard size documents and 10,000 large formats [E Plans]) for example purposes

Every reference and project we have provided has recurring projects. Typically, we schedule in batches of records. For example, 25 boxes (57 thousand pages), 50 boxes (115,000 thousand pages), 100 boxes (230,000 pages). For purposes of your requirement, 10,000 standard size documents is the equivalent of 6 standard file boxes while 10,000 large format prints (E Size) is the equivalent of 5 oversized "dishwasher" boxes.

- 6 Standard Boxes Small Format Documents → 2 FTE's → 1 Day
- 5 Oversized Boxes Large Format Size E → 3 FTE's → 2 Days

Sample Project Timeline

Our current throughput is 150 boxes per week in our Florida service bureau.

Description	Sep-18	Oct-18	Nov-18	Dec-18	2019	2020	2021	Totals
Batch Numbers	B1	B2	B3	B4	B5 - B16	B17 - B28	B29- B36	-
Boxes Picked Up	14	14	14	14	168	168	108	500
Images Per Batch	32,200	32,200	32,200	32,200	386,400	386,400	248,400	1,150,000
Percentage Complete	3%	3%	3%	3%	34%	34%	22%	100%
Preparation Labor Hours	35	35	35	35	420	420	270	1,250
Scanning Labor Hours	31.5	31.5	31.5	31.5	378	378	243	1,125
Indexing Labor Hours	7	7	7	7	84	84	54	250
Final Verification Hours	3.5	3.5	3.5	3.5	42	42	27	125
Data Transmission Hours	1.75	1.75	1.75	1.75	21	21	13.5	63
Total Labor Hours	78.75	78.75	78.75	78.75	945	945	607.5	2,813
Preparation FTE's	1	1	1	1	1	1	1	
Scanning FTE's	1	1	1	1	1	1	1	
Indexing FTE's	1	1	1	1	1	1	1	
Final & Data FTE's	3	3	3	3	3	3	3	

The above schedule depicts batches, boxes and images converted on a per batch and per box basis. It also summarizes estimated labor needs for this conversion project. While 1.1 million pages appear to be a high volume, this project only requires 3 FTE's (well-trained full-time employees).

WebFlow monitors each project and provides project team members with "real-time" updates for all projects companywide.

Through the data we have collected using WebFlow, we can estimate labor hours for each project based on task (preparation, scan, index, review, and data transmission). We know, on a daily, weekly, and monthly basis what our labor hour requirements are.

4.2.4 Explain how the transportation of documents will be handled (types of vehicles and containers that will be used).

ADS Fleet

We own all our vehicles without encumbrances. They are equipped with fire extinguishers and locking mechanisms controlled by our full-time driver. We currently have two 2016 Ford Transit 250 cargo vans. These vans comfortably fit 125 standard file boxes. Our routes are one-way. Our vehicles are not parked at hotels or otherwise for periods of time. Vehicles are fully fueled prior to pick-ups.



ADS Chain of Custody Procedures

Our driver and warehouse manager will be introduced at project inception as a member of the project team and identified by an ADS uniform. He manages pick-ups throughout Florida daily.

- Coordinated Batch Pick-Up between ADS Driver and Client Project Manager
- Driver: Create Manifest & cover pages / Picks Up Boxes / Packs / Reconciles to Pick-Up Log
- Driver: Report exceptions or discrepancies to Client Project Manager
- Log signed by ADS Drive and Client Project Manager
- Boxes transported directly to an ADS facility.
- Boxes unpacked and confirmed Manifest / Transmittal again at the ADS facility.
- Batch is entered in WebFlow for tracking purposes designating physical receipt of boxes.

Box Name	Status	# SF	# LF	Actions
Box 1001	New	0	0	Modify Delete
Box 1002	New	0	0	Modify Delete
Box 1003	New	0	0	Modify Delete
Box 1004	New	0	0	Modify Delete
Box 1005	New	0	0	Modify Delete
Box 1006	New	0	0	Modify Delete
Box 1007	New	0	0	Modify Delete
Box 1008	New	0	0	Modify Delete
Box 1009	New	0	0	Modify Delete
Box 1010	New	0	0	Modify Delete
Box 1011	New	0	0	Modify Delete
Box 1012	New	0	0	Modify Delete
Box 1013	New	0	0	Modify Delete
Box 1014	New	0	0	Modify Delete
Box 1015	New	0	0	Modify Delete
Box 1016	New	0	0	Modify Delete

This screenshot depicts the initial receipt of Batch 65 consisting of 100 boxes. No work has begun yet on this project. All boxes are tracked through all levels of production. Each batch we pick up with COFL will be entered into our WebFlow program to mirror your batch, box #'s and descriptions.

Each batch of records is tracked from pick-up to destruction in our WebFlow program. Inactive boxes are stored in sections within our warehouse and are clearly marked and inventoried. As records are converted and cleared as reviewed, they are marked as such with colored labels on the boxes themselves and within WebFlow. We have depicted box lifecycles in graphics throughout this proposal. Microform data is handled in a similar manner to hard copy records.

Example, Pick-up and Delivery Confirmation Log.



ADVANCED DATA SOLUTIONS, INC.

141 Scarlet Boulevard, Suite A
Oldsmar, Florida 34677
813.855.6575 Fax
813.855.3545 Corporate
www.adsus.net

Pick-Up and Delivery Confirmation

Pick-Up Information

Client / Division: _____

Batch Release # _____

Box #s: _____

Released By: _____ Date: _____
Printed Name (Client Representative)

Signature

Received By: Date: _____

Signature

Re-Delivery Information

Client / Division: _____

Batch Release # _____

Box #s: _____

Received By: _____ Date: _____
Printed Name (Client Representative)

Signature

Delivered By: Date: _____

Signature

Media Transfer: _____
(DVD, CD-Rom, Hard Drive)

Section 5 – Security of Service Facility

Security of Service Facility	10%	☒
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4.2.5 Identify main office(s) and other office locations that will service this contract

The contract will be serviced at our corporate headquarters in Oldsmar.

4.2.5 Identify square footage of storage facility where the documents will be stored, scanned and media conversion services performed. Include if facility has air conditioning and security alarm/fire sprinkler services.

Our 9,000 SF conversion facility is air-conditioned. We maintain a security alarm system with recorded video surveillance. The recorded surveillance retention is greater than 60 days. We do maintain smoke alarms throughout the building. Fire extinguishers are inspected and certified regularly in accordance with local Fire Regulations. The City of Oldsmar Fire Department is across the street from our office as well.

4.2.5 List security measures to safeguard the information contained within customer documents
4.2.5 Frequency of servers and workstations back-ups.
4.2.5 Explain security devices and technologies currently deployed in your computer network and how servers/workstations are protected from intrusion originating from either inside or outside.

Asset Protection

For purposes of this plan, ADS has classified our assets into four major categories:

- 1) Electronic Data Security – Client Records (records converted or in the process of conversion to digital format)
- 2) Internal Electronic Data (Program Files, Internal Databases, Administration & Other Data)
- 3) Paper Records (at any stage of production)
- 4) Plant Assets (ADS assets such as vehicles and equipment)

Electronic Data Security – Client Records

Our client electronic data is classified into two categories:

Cold Data: Consists of files already processed, reviewed, and transmitted to client sites. This data has typically been backed up in multiple locations as follows:

- Backed Up to Network Storage or Tape device at ADS site.
- Backed up to DVD media or external storage device at ADS site.
- Copy of DVD media or external storage device provided to client.
- Data copied to client network at client site.
- Data backed up to Network Storage or Tape device at client site.

Hot Data: Consists of files in process and in a review stage. Our internal production process requires that most active data be reviewed and transmitted to our clients within a one-to-two-week cycle. Batches of data are scanned, indexed, and reviewed during this period. Our experience has been that the production environment works most accurately, efficiently, and effectively if two or less jobs (or batches) are performed simultaneously. This creates a more organized production environment with consistent production

requirements established on a per job basis. For example, records are managed in an organized manner when processed in similar batches. Scanning, Indexing and Review functions are more efficient when performed in batch processes as well.

Hot Data is backed up at ADS site as follows:

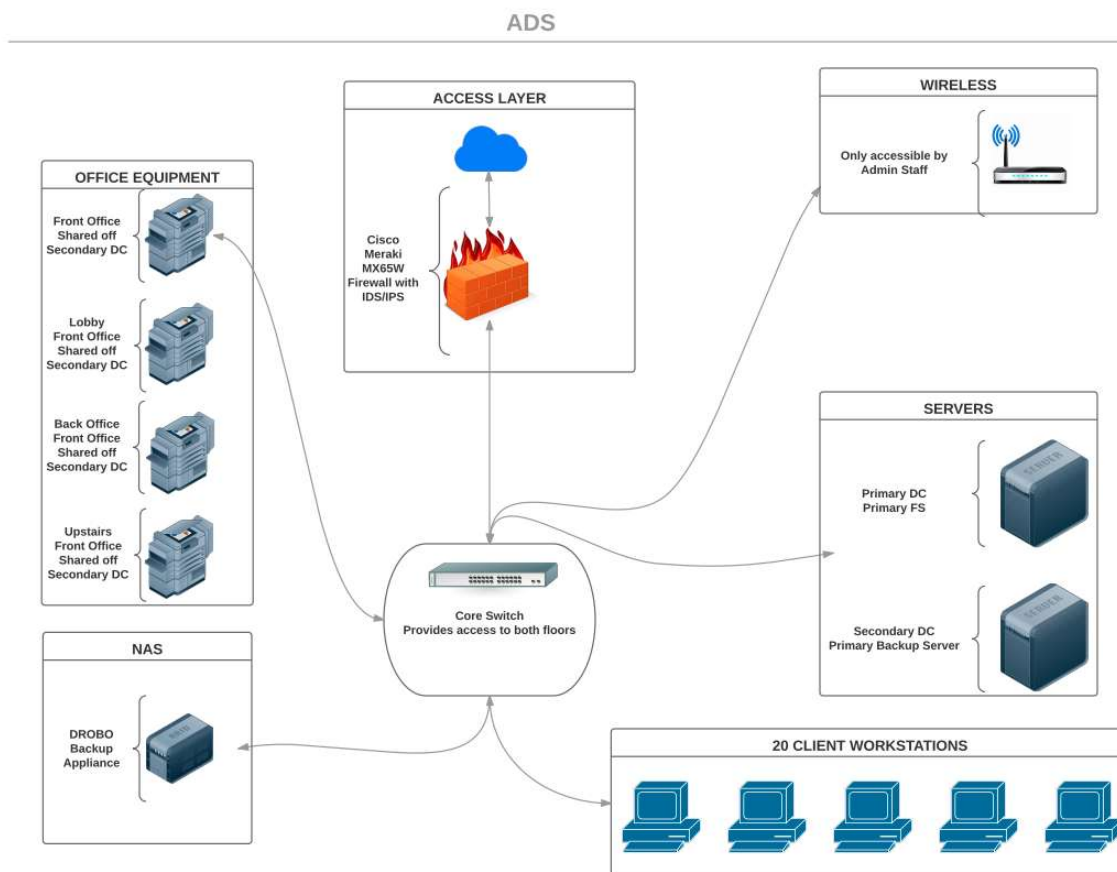
- Backed up to Network Storage or Tape device at ADS site on a nightly basis.
- Tape rotation schedule is based on client contract needs.
- Tapes are rotated off-site by the Information Technology team.

In the event of a probable direct hit of a hurricane and evacuation, ADS will physically remove back-up devices and CD/DVD media from our facility and relocates such data to a protected location (in certain cases hundreds of miles away). In addition, actual microfilm and microfiche is concurrently relocated. We also maintain certain critical data on CD & DVD discs contained in a fire-proof safe, which is also relocated in the event of an emergency.

Network Security - Managed Data

Network and Active Data Storage is backed up hourly using our Datto appliance, which is stored in our air conditioned, combination-locked server room. Inactive data is stored on DVD media discs (also in our server room), external hard drives and at client locations thus creating duplicate and off-site redundancy at a minimum. We have a fireproof safe which is used for the containment of certain and specified data discs and media.

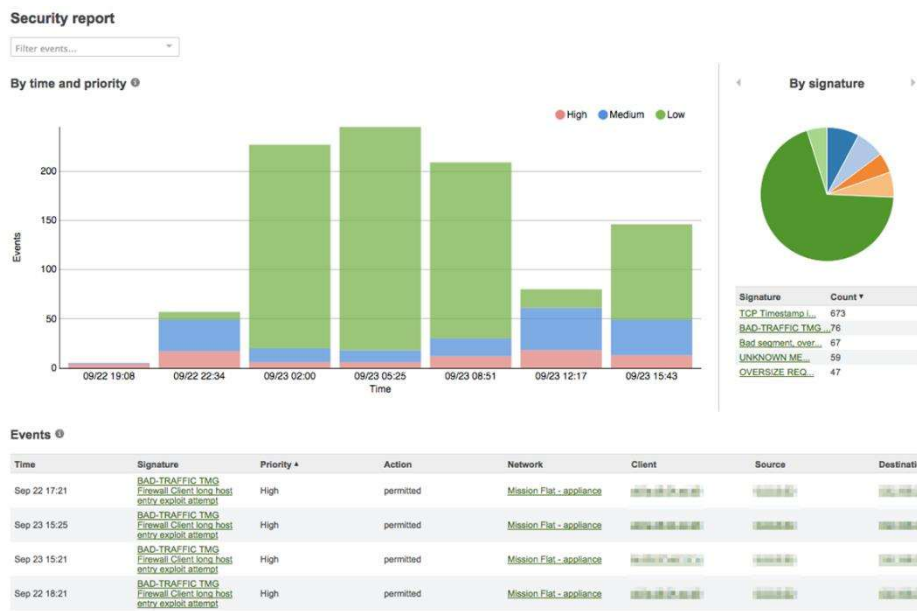
Workstations do not contain client data. We maintain system recovery discs for all individual workstations.



Network

The current network topology consists of 50MB fiber coming from Frontier FIOS. This gets routed through our Cisco Meraki MX65W firewall, which also acts as our core router.

The Cisco Meraki MX65W provides IDS/IPS (Intrusion Detection/Prevention System) as well as malware protection for the network. By using Cisco’s cutting edge Sourcefire detection engine, the firewall provides real time threat analysis and gives regular reports on its findings to our IT department allowing them to adjust our network security accordingly.



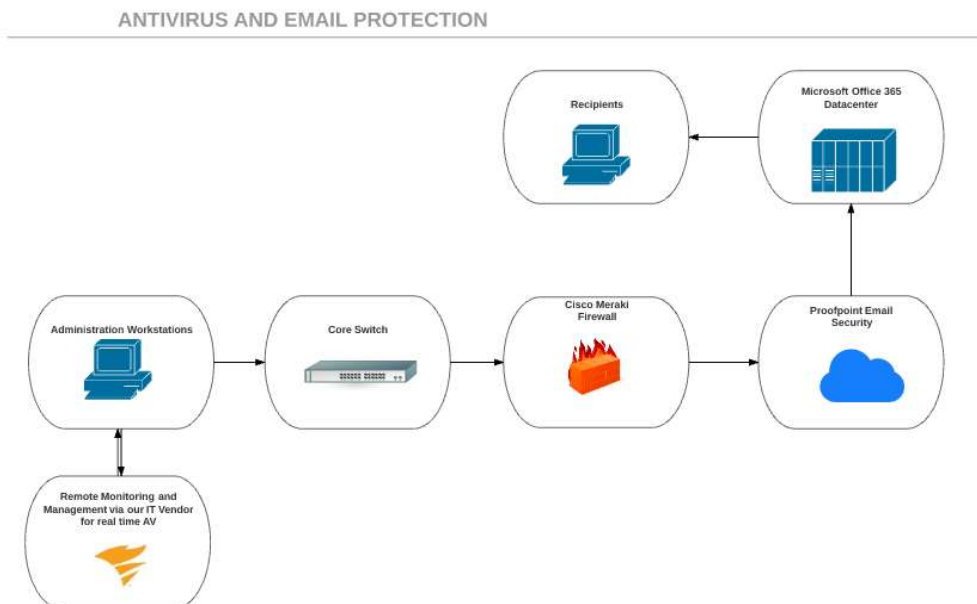
Port forwarding is setup on the firewall, allowing only specific protocols to be utilized. SFTP (Secure File Transfer Protocol) is configured for secure file transfers to and from our core file server, allowing only authorized users temporary access. DHCP reservations are setup for all servers and networking devices to bolster our network security.

Servers

Our server room is an air conditioned, combination locked room that is located in the administrative offices of ADS. Only high-level management have authority and access to this room. If any changes or issues occur with our servers, IT receives automatic alerts from our Remote Monitoring and Management system (RMM). In addition to remote monitoring, we perform monthly inspections of the network systems, applications, and infrastructure to ensure all processes are functioning as designed. Our RMM system also includes Bitdefender, an anti-virus and anti-malware program that runs real time threat detection and automatically quarantines any potentially malicious content.

Our core domain controller and file server is a Dell PET430 running Windows Server 2012 Standard. We are currently in the process of adding a Dell PowerEdge T640 to be used as our primary server. All source images, files, and metadata are housed in the central file server until processing occurs. Once all data has been processed, it is sent to the customer per their request. Data currently on the server is backed up by our backup appliance. This server also runs our SFTP application allowing for secure file transfers as requested by our customers.

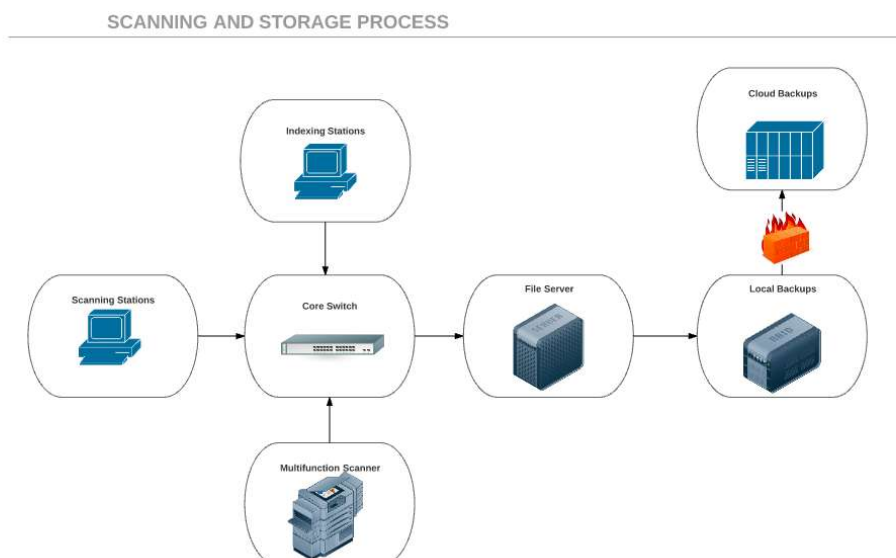
Email System



Our email is currently deployed through Microsoft Office 365, providing the most up to date compliance, including PCI-DSS level one and HIPAA-Business Associate Agreement. By hosting in Microsoft's datacenter, this allows for redundancy for all network operations. Microsoft applies real time malware and spam filtering that helps protect inbound and outbound email from malicious software and spam. Audit logs for the entire mail directory are taken and recorded in Microsoft's Exchange Administration Console (EAC) for review if necessary.

In addition to Microsoft's spam filtering, we utilize Proofpoint Email Protection. This provides enhanced security against malware, and also provides URL defense and spoof protection by checking sender-recipient relationship, email headers and domain reputation checks. Proofpoint also uses its own brand of Enterprise Continuity, allowing standalone access in the event of an emergency. This is an automatic service that gets deployed immediately when an outage has occurred.

Backups and Redundancy



Our backup appliance runs encrypted virtual images of the server daily. These backups are stored locally on our Datto device, which provides file level restores as well as a host for the server images locally. Hourly file level restores in addition to real time threat detection which allows for minimum exposure to new viruses, including the new forms of ransomware. These encrypted backups are sent offsite to Datto's secure datacenters which meet SSAE-16 standards.

All backups are secured with AES-256 encryption with the passkey kept only by onsite administration. This level of redundancy, in addition to current standards of anti-virus and anti-malware protection help prevent data loss from any type of encryption viruses.

In the case of a server failure, we have the ability to host the most up to date virtual image on our backup appliance. In addition to providing another level of redundancy, this eliminates downtime while our IT department resolves the issue, allowing us to stay on schedule. In the event the building was compromised, we have the ability to host the server in the cloud, allowing for access to data from one of our other sites if necessary.

Wireless

Wireless access is distributed from the Meraki MX65W using Cisco's WIPS (Wireless Intrusion Protection System) Air Marshal. This allows for real time protection against rogue access points, malicious clients sending packet floods and man in the middle attacks.

In compliance with Payment Card Information Data Security Standards (PCI DSS), the device is locked in the server room with limited access by administration and IT. It records wireless archives from WIPS for up to one year. We perform quarterly wireless scans and have monitoring setup for all alerts that get sent to administration and IT.

We currently deploy a hidden SSID with a complex password. Only administrators have access to the wireless network. Wireless access is never used to access or manipulate data on the network

Workstations

All workstations on the domain are running Windows 7 Professional or Windows 10 Professional operating systems. Each user has their own Active Directory account, with access to only the application and record batch of which they have been assigned and approved. Workstations dealing with sensitive data have encrypted hard drives following HIPAA guidelines and are properly disposed of after phase-out of the workstation life cycle.

Current domain policies dictate all user accounts have a unique password with at least eight characters, including a capital letter and a number. Passwords for all users are required to be changed every 30 days. Workstations are set to automatically lock after eight minutes of idle time preventing any unauthorized access.

Client machines are all individually setup with antimalware and antivirus protection using Bitdefender. Bitdefender is an industry leading real-time anti-virus and anti-malware product that prevents viruses from being run on the local workstation as well as proactively scanning emails to ensure no threats exist in any attachments, including OST and PST files. This is provided and actively monitored by our IT department. If a virus or malware is detected, Bitdefender automatically quarantines the item and sends a notification based on severity of the flagged item. This is then processed by IT to ensure proper procedures on virus and malware removal. In addition to software, all client machines are monitored by our IT department. Automated alerts are sent to IT when any hardware failure has occurred.

Paper Records - Client

ADS maintains a Client Inventory Log that details all client records maintained in-house and their related production status. At any point, we can review this log to determine production needs, deadlines, and precautions necessary in the event of a disaster. Our tangible third-party data is classified into three categories as follows:

Unprocessed Files: These files represent the highest risk category of documents maintained at our facility. Based on certain client requirements, ADS will prioritize the processing of files in an expeditious manner due to storm activity which potentially threatens our physical location within a two-week time frame. Because we run 2 shifts, we can easily process batches of 100 boxes of records within a few days. Based on our capacity and storm activity, certain client records can be processed, reviewed, and returned thus eliminating unnecessary risk of hard copy records. Unprocessed records could also be returned based on client requirements.

Due diligence will be taken for unprocessed files not returned to client site as follows. All boxes will be secured in the warehouse on shelves at elevations exceeding five feet. Boxes will be labeled and maintained in original batches. They will be covered with plastic tarps and secured with the grommets, steel shelving and line to ensure utmost protection from flooding or possible wind.

In Process Files: All files in process will be backed up to a Network Storage Device / CD or DVD media on a nightly basis. In certain cases, in-process files may be returned to client sites based on individual requirements. Boxes not returned will be treated in the exact manner as Unprocessed Files per above.

Completed Files: Completed files are divided into two categories: Slated for Destruction and Return to Client.

All files categorized as Return to Clients will be returned at the time of media transmission or within 5 working days. In the event of a predictable natural disaster, such files will be returned to the client site immediately.

Files slated for destruction will be separated and placed in the destruction cage pending Destruction Certificate issuance. This process will be expedited based on circumstances evident from weather authorities. Pinellas County Waste Management permits access to the incinerator during storm periods to facilitate the destruction of as much debris as possible prior to an impending storm. Ultimately, ADS facilitates the destruction of all authorized records thus ridding our warehouse of unwanted hard copy data in the event of a storm. Thus, our efforts are more strongly focused on the physical security of vulnerable hard copy records.

ADS currently owns two cargo vans with a capacity of transporting 125 boxes per trip. Our ability to relocate or redeliver hard copy records to our clients during an evacuation or disaster period is strong. Since our monthly processing of records ranges between 200 to 400 boxes, it is feasible that all hard copy records could be redelivered or relocated in a short period of time.

Plant Assets

ADS plant assets generally consist of the following:

1. Computer Equipment (CPU's, Monitors & Printers)
2. Production Scanners
3. Wide Format Scanners
4. Microfilm Conversion Machine (W&W)
5. Servers & Rack
6. Cargo Vans and Vehicles
7. Miscellaneous Equipment, Supplies and Furniture

Depending on the classification of an impending storm, ADS will protect plant assets as follows:

Category 3 or Lower Hurricane Prediction: All electronic devices will be removed from power supplies and safely secured on site. CPUs, printers, the W&W and other miscellaneous equipment will be placed in plastic containers and stored at higher elevations. Scanners and other equipment will also be elevated. The server rack will be systematically powered down and disabled from all power supply sources. Cargo vans will either be relocated or maintained at our location.

Category 4 or 5 Hurricane Prediction: All electronic devices will be removed from power supplies and safely secured on site. CPU's, printers, certain scanners, and other miscellaneous equipment will be placed in plastic containers and stored at higher elevations. The server rack will be systematically powered down and disabled from all power supply sources. Select CPU's, scanners, the W&W and Server components will be relocated to a secure off-site location. Cargo vans will be either be relocated or utilized to relocate select equipment / client records.

Our administrative team oversees all disaster recovery operations and communications necessary between clients, vendors, employees, and outside organizations. This team initiates the actions of all other teams. Progress of the Warehouse Security, Information Technology and Plant Asset teams are monitored hourly to determine if other resources are needed to complete outlined tasks. This team also maintains phone and contact listings of all employees, clients, vendors, and necessary 3rd parties.

Plant Equipment:

Based on the severity of the anticipated storm, our team will disassemble all PC's, the W&W, Large and Small Format Scanners and other miscellaneous equipment for either storage or removal to a secure off-site location. All significant equipment will be packed in plastic containers and elevated five feet if left at ADS during storm period.

Evacuation Determination:

ADS will consider the following in determining the level of evacuation necessary.

- Anticipated storm path
- Intensity of storm
- Expected storm surge at ADS location
- Expected winds at ADS location

Alternate Disaster Location – Out of State

Advanced Data Solutions, Inc.
65 Antioch Road
Dallas, Georgia 30157

Our alternate location is a brick building on located on high ground consisting of 2,500 square feet of usable space. Wind rating for this building is considered greater than 130 miles per hour (top rating for a Category 3 hurricane).

4.2.5 Identify if background checks are performed for employees and if they are bonded.

We routinely perform background checks on internal staff. In addition, we run E-Verify immigration reports within 2 days of every newly hired employee to validate legal employment status. Key employees have passed rigorous background checks by FDLE in conjunction with a large adoption records project. Our driver and warehouse manager has also passed a rigorous background check by FDLE facilitating his presence at homeland security protected offices.

We have not been asked to bond employees under any solicitation. If the COFL requires this insurance, we will adhere to the requirement.

Section 7 – Subcontractors

4.2.7 Proposer must clearly identify any subcontractors that may be utilized during the term of this contract.

ADS does not utilize any subcontractors for our conversion services.

Section 8 – Required Forms

Section VI – COST PROPOSAL PAGE

Cost for Services Performed	30%	☒
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Proposer Name: Advanced Data Solutions, Inc.

Proposer agrees to supply the products and services at the prices bid/proposed below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Proposer shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

PRICING FOR SCANNING/IMAGING SERVICES:

Pricing for scanning/imaging must include prepping and indexing.

TRANSPORTATION COSTS

Proposers must include any transportation costs in the unit price per image.

GROUP 1 - Scanning, Indexing, Imaging and Media Conversion Services

No.	Item Description	Estimated Quantity	Unit Price	Total Price
1.1	Unit cost/per scanned image, letter and legal sized documents, up to 11" x 17"	7,000,000	\$.055	\$385,000.00
1.2	Unit cost/per scanned image, for E size shop drawings.	400,000	\$.495	\$198,000.00
1.3	Destruction documents after scanning and review of scanned images by the City is complete. Unit price per pound	100,000	Included	\$0.00
1.4	Cost per character indexing above 30 characters	7,000,000	Included	\$0.00
	GROUP 1 TOTAL:			\$583,000.00

GROUP 2 - Microfiche Conversion Services

No.	Item Description	Estimated Quantity	Unit Price	Total Price
2.1	Unit cost/per scanned image, of 16 – 35mm microfiche flats, at an average of 8 images per jacket; to be converted to scanned images	500,000	N/A	N/A
2.2	Destruction documents after scanning and review of scanned images by the City is complete.	500,000	N/A	N/A
2.3	Indexing Images by block, lot, parcel, address and/or permit number	500,000	N/A	N/A
2.4	Cost per character indexing above 30 characters	250,000	N/A	N/A
	GROUP 2 TOTAL:			N/A

ADS is not bidding on the Microfiche Conversion Services**Submitted by:**Melody S. Engle

Name (printed)

October 18, 2022

Date



Signature

President

Title

3.1.10 – Service Organization Controls

The Contactor should provide a current SSAE 18, SOC 2, Type I report with their proposal. Awarded Proposer will be required to provide an SSAE 18, SOC 2, Type II report annually during the term of this contract. If the Proposer cannot provide the SSAE 18, SOC 2, Type I report at time of proposal submittal, a current SOC 3 report will be accepted.



Advanced Data Solutions, Inc.

System and Organization Controls 3 (SOC 3) Report

Report on the Advanced Data Solutions Records Management System Relevant to Security, Availability and Confidentiality

**For the Period from January 1, 2021 through December 31,
2021**



2401 West Bay Drive
Suite 424
Belleair Bluffs, Florida 33770
Ph: (727) 393-2439
Fax: (727) 610-7204

Report of Independent Accountants

To the Management of Advanced Data Solutions, Inc.:

Scope

We have examined management's assertions, contained within the accompanying "Management's Report of Its Assertions on the Effectiveness of Its Controls Over the Advanced Data Solutions Records Management System Based on the Trust Services Criteria for Security, Availability, and Confidentiality" (Assertion), that Advanced Data Solutions, Inc.'s (ADS) controls over the Advanced Data Solutions Records Management System (System) were effective throughout the period January 1, 2021 to December 31, 2021, to provide reasonable assurance that its principal service commitments and system requirements were achieved based on the criteria relevant to security, availability, and confidentiality (applicable services criteria) set forth in the American Institute of Certified Public Accountants' TSP section 100, *2017 Trust Services Criteria for Security, Availability, Processing Integrity, Confidentiality, and Privacy*.

Management's Responsibilities

ADS' management is responsible for its assertion, selecting the trust services categories and associated criteria on which its assertion is based, and having a reasonable basis for its assertion. It is also responsible for:

- Identifying the Advanced Data Solutions Records Management System and describing the boundaries of the System.
- Identifying our principal service commitments and system requirements and the risks that would threaten the achievement of its principal service commitments and service requirements that are the objectives of our system.
- Identifying, designing, implementing, operating, and monitoring effective controls over the Advanced Data Solutions Records Management System to mitigate risks that threaten the achievement of the principal service commitments and system requirements.

Our Responsibilities

Our responsibility is to express an opinion on the Assertion, based our examination. Our examination was conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants. Those standards require that we plan and perform our examination to obtain reasonable assurance about whether management's assertion is fairly stated, in all material respects. An examination involves performing procedures to obtain evidence about management's assertion, which includes (1) obtaining an understanding of ADS' relevant security, availability, and confidentiality policies, processes and controls, (2) testing and evaluating the operating effectiveness of the controls and (3) performing such

other procedures as we considered necessary in the circumstances. The nature, timing and extent of the procedures selected depend on our judgement, including an assessment of the risk of material misstatement, whether due to fraud or error. We believe that the evidence obtained during our examination is sufficient to provide a reasonable basis for our opinion.

Our examination was not conducted for the purpose of evaluating ADS' cybersecurity risk management program. Accordingly, we do not express an opinion on any other form of assurance on its cybersecurity risk management program.

Inherent Limitations

Because of their nature and inherent limitations, controls may not prevent, or detect and correct all misstatements that may be considered relevant. Furthermore, the projection of any evaluations of effectiveness to future periods, or conclusions about the suitability of the design of the controls to achieve ADS' principal service commitments and system requirements, is subject to the risk that controls may become inadequate because of changes in conditions, that the degree of compliance with such controls may deteriorate, or that changes made to the system or controls, or the failure to make needed changes to the system or controls, may alter the validity of such evaluations. Examples of inherent limitations of internal controls related to security include (a) vulnerabilities in information technology components as a result of design by their manufacturer or developer; (b) breakdown of internal control at a vendor or business partner; and (c) persistent attackers with the resources to use advanced technical means and sophisticated social engineering techniques specifically targeting the entity.

Opinion

In our opinion, ADS' controls over the system were effective throughout the period January 1, 2021 to December 31, 2021, to provide reasonable assurance that its principal service commitments and system requirements were achieved based on the applicable trust criteria.

Dreslin Financial Services

Dreslin Financial Services
Certified Public Accountants
Belleair Bluffs, Florida
Florida License # AD63316

June 30, 2022



ADVANCED DATA SOLUTIONS, INC.

Management's Report of its Assertions of the Effectiveness of Its Controls Over the Advanced Data Solutions Records Management System Based on the Trust Services Criteria for Security, Availability and Confidentiality

We, as management of Advanced Data Solutions, Inc. (ADS) are responsible for:

- Identifying the Advanced Data Solutions Records Management System (System) and describing the boundaries of the System
- Identifying our principal service commitments and system requirements
- Identifying the risks that would threaten the achievement of its principal service commitments and system requirements that are the objectives of our system
- Identifying, designing, implementing, operating, and monitoring effective controls over the System to mitigate risks that threaten the achievement of the principal service commitments and system requirements.
- Selecting the trust services categories that are the basis of our assertion

We assert that the controls over the system were effective throughout the period January 1, 2021 to December 31, 2021, to provide reasonable assurance that the principal service commitments and system requirements were achieved based on the criteria relevant to security, availability, and confidentiality set forth in the AICPA's TSP section 100, 2017 *Trust Services Criteria for Security, Availability, Processing Integrity, Confidentiality and Privacy*.

Advanced Data Solutions, Inc.

Melody S. Engle

Melody S. Engle
President

Advanced Data Solutions Records Management System (ARMS) Overview

Advanced Data Solutions, Inc. (ADS), founded in Florida during 1999, is a records management service company which converts paper and microform records to digital format.

OVERVIEW OF ARMS AND ITS BOUNDARIES

The ADS Records Management System (ARMS) consists of scanners, computer servers, network file system, PCs and applications used for converting paper and microform data to digital format. Software is limited to currently supported Microsoft Windows operating systems on Company issued personal computers and the following applications.

- Kodak Capture Pro - Document Scanning Software developed by Kodak Alaris
- Laserfiche Enterprise Content Management Software – developed by Laserfiche
- Contex Next Image Scan & Archive - Wide Format Scanning Software developed by Contex
- Quantum Scan / Quantum Process - Microform Conversion Software developed by Mekel

The scope of the system description includes the following conversion services:

- Document Scanning
- Microform Conversion
- Data Entry

The scope of the locations covered in this report include the data conversion center in Oldsmar, Florida

Boundaries of the ARMS

The boundaries of the ARMS include applications (described above) and infrastructure that directly support the outsourced conversion services provided by ADS to customers, including infrastructure software, people, procedures and data. Any applications, repositories, databases, and infrastructure that indirectly support the records management services provided to customers are not included within the boundaries of ARMS.

Infrastructure

The ADS primary facility is located in the city of Oldsmar, Florida. There are appropriate security controls limiting physical access to its office space and its operations. ADS has one physical server and several workstations which utilize the Windows Operating System to manage security on the IT resources applications and data. ADS utilizes firewalls, intrusion detection systems and endpoint protection systems to monitor its network, applications, and data.

Our simply designed infrastructure is presently responsible for supporting our technology solutions. These systems are summarized below by operating system and the various functions served.

Systems	Functions
Windows Server 2012 R2 Standard	Monitoring Tools, Application Servers, SFTP Services, Networking Systems, Backup/Recovery Services, Domain Control, System Management Tools, Source Image Storage, Metadata Storage
Microsoft 365 Business Standard	Hosted Email Communications, Application Licensing

Software

The ARMS is comprised of third-party developed applications as described with the exception of ADS WebFlow which is our internal project tracking system. All changes to the applications are developed and managed by third-party vendors. ADS separately maintains an information technology infrastructure and specific software applications to effectively operate and support ARMS.

Procedures

Information Security (IS) policies and procedures are formally documented by Senior Management to detail policies and procedures related to system security, confidentiality and processing integrity. The IS policies and procedures are reviewed, updated and approved by management on a quarterly basis or as changes occur.

Principal Service Commitments and System Requirements

Overview

Advanced Data Solutions Records Management System (ARMS) designs its processes and procedures to meet its objectives for the System. Those objectives are based on the service commitments that ARMS makes to user entities (customers), the laws and regulations that govern the provision of the ARMS System, and the financial, operational and compliance requirements that ARMS has established for the services.

The ARMS services are subject to relevant regulations, as well as state privacy security laws and regulations in the jurisdictions in which ARMS operates.

Security, Availability and Confidentiality commitments to customers are documented and communicated in Customer Service Agreements. Security, Availability and Confidentiality commitments are standardized and include, but are not limited to, the following:

- Security and confidentiality principles inherent to the fundamental design of the ARMS System are designed to appropriately restrict unauthorized internal and external access to data and customer data is appropriately segregated from other customers.
- Security and confidentiality principles inherent to the fundamental design of the ARMS System are designed to safeguard data from within and outside of the boundaries of environments which store a customer's content to meet the service commitments.
- Availability principles inherent to the fundamental design of the ARMS System are designed to replicate critical system components and authoritative backups are maintained and monitored to ensure successful replication to meet the service commitments.

ARMS establishes operational requirements that support the achievement of security, availability and confidentiality commitments, relevant laws and regulations, and other system requirements. Such requirements are communicated in ARMS' system policies and procedures, system design documentation, and contracts with customers. Information security policies define an organization-wide approach to how systems and data are protected. These include policies around how the service is designed and developed, how the system is operated, how the internal business systems and networks are managed, and how employees are hired and trained. In addition to these policies, standard operating procedures have been documented on how to carry out specific manual and automated processes required in the operation and development of the Advanced Data Solutions Records Management System.

People

Advanced Data Solutions organizational structure provides a framework for planning, executing, and controlling business operations. Senior leadership play important roles in establishing the Company's tone and core values. The organizational structure assigns roles and responsibilities to provide for adequate staffing, security, efficiency of operations and segregation of duties. Management has also established authority and appropriate lines of reporting to key personnel.

Data

The IS policies and procedures formally document policies for classifying data based on its criticality and sensitivity, as well as procedures detailing how classifications are used to define protection requirements, access rights, access restrictions, data retention and data destruction requirements.

Data is collected physically via chain of custody transfer of paper and microform records. Source image data is created digitally through the conversion of paper and microform scanning processes. Metadata is created from ADS input at the direction of the customer.

Availability

The ADS Disaster Recovery Program encompasses processes and procedures by which ADS identifies and recovers from a major event within the ADS service environment. This program addresses contingency management to include business continuity, disaster recovery and risk mitigation. Our programs have been tested numerous times without fail.

Confidentiality

Advanced Data Solutions is committed to protecting the security and confidentiality of its customers' data. Our systems and services are designed to only enable ADS customers to access their source images and metadata. There is no third-party access to a customer's content.

Internally, confidentiality requirements are communicated to employees through training and policies. Employees are periodically updated on internal policies and procedures related to protecting a customer's content. Confidentiality requirements are included with initial employment application packages and are reviewed and updated at least annually.

Supplier Response Form

BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder to ensure that his bid is submitted electronically through www.BidSync.com prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) Advanced Data Solutions, Inc.

* EIN (Optional):

Address: 141 Scarlet Blvd Suite A

City: Oldsmar

* State: FL

* Zip: 34677

Telephone No.: 8138553545

* FAX No.: 8138553545

* Email: mengle@adsus.net

Delivery: Calendar days after receipt of Purchase Order (section 1.02 of General Conditions): 30 days

Total Bid Discount (section 1.05 of General Conditions): 0

Check box if your firm qualifies for MBE / SBE / WBE (section 1.09 of General Conditions): ☒

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

Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued
*	*				

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A. **You must also click the "Take Exception" button.**

We have no variances. We acknowledge having read all questions and answers released by the City of Ft Lauderdale.

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal.

I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Melody S. Engle
Name (printed) *

10/19/2022
Date *


Signature *

President
Title *

Revised 4/28/2020

Supplier Response Form**CONTRACT PAYMENT METHOD**

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to credit card payments via MasterCard or Visa as part of this program.

This allows you as a vendor of the City of Fort Lauderdale to receive your payments fast and safely. No more waiting for checks to be printed and mailed.

In accordance with the contract, payments on this contract will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, bidders must presently have the ability to accept these credit cards or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

All costs associated with the Contractor's participation in this purchasing program shall be borne by the Contractor. The City reserves the right to revise this program as necessary.

By signing below you agree with these terms.

Please indicate which credit card payment you prefer:

☐ MasterCard

☒ Visa

Advanced Data Solutions, Inc
Company Name

Melody S. Engle
Name (Printed)

10/19/2022
Date


Signature

mengle@adsus.net
Title

Supplier Response Form



DISADVANTAGED BUSINESS ENTERPRISE (DBE) PREFERENCE

Section 2-185, Code of Ordinances of the City of Fort Lauderdale, provides for a disadvantaged business enterprise preference.

In order to be considered for a DBE Preference, a bidder must include a certification from a government agency, as applicable to the DBE Preference class claimed **at the time of bid submittal**.

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

- a) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **or** State of Florida active registration **and/or**
- b) List of the names of all employees of the bidder and evidence of employees' residences within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the disadvantaged business enterprise preference.

THE COMPLETE DBE PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE

FOLLOWING LINK: https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeId=COOR_CH2AD_ARTVFI_DIV2PR_S2-185EQOPDIBUEN&showChanges=true

Definitions

- a. The term "disadvantaged class 1 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the City, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- b. The term "disadvantaged class 2 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the City with full-time employees and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- c. The term "disadvantaged class 3 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- d. The term "disadvantaged class 4 enterprise" shall mean any disadvantaged business enterprise that does not qualify as a Class 1, Class 2, or Class 3 business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.

DISADVANTAGED BUSINESS ENTERPRISE CERTIFICATION STATEMENT

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

- | | |
|-----------------------------------|--|
| (1) <u>N/A</u>
(Business Name) | is a disadvantaged Class 1 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the City, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. |
| (2) <u>N/A</u>
(Business Name) | is a disadvantaged Class 2 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the City with full-time employee(s) and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. |
| (3) <u>N/A</u>
(Business Name) | is a disadvantaged Class 3 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. |
| (4) <u>N/A</u>
(Business Name) | is a disadvantaged Class 4 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that does not qualify as a Class 1, Class 2, or Class 3 business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual. |
| (5) <u>N/A</u>
(Business Name) | requests a Conditional Class 1 classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |
| (6) <u>N/A</u>
(Business Name) | requests a Conditional Class 2 classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |

BIDDER'S COMPANY: Advanced Data Solutions, Inc

AUTHORIZED
COMPANY
PERSON:

Melody S. Engle

PRINT NAME



SIGNATURE

10/19/2022

DATE

Forms Non-Iso – revised 7/2/2021

Supplier Response Form**E-VERIFY AFFIRMATION STATEMENT**

RFP/Bid /Contract No:

12696-535

Project Description:

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- (a) all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- (b) all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Advanced Data Solutions, Inc

Contractor/Proposer/ Bidder Company Name:

[Signature]
Authorized Company Person's Signature:*President*
Authorized Company Person's Title:*10/19/2022*
Date:

Supplier Response Form

LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

Section 2-186, Code of Ordinances of the City of Fort Lauderdale, (Ordinance No. C-17-26), provides for a local business preference.

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

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

- a) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **and**
- b) List of the names of all employees of the bidder and evidence of employees' residences within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

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

THE COMPLETE LOCAL BUSINESS PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK: https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeId=COOR_CH2AD_ARTVFI_DIV2PR_S2-186LOBUPR&showChanges=true

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

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

LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

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

- | | | |
|-----|---|--|
| (1) | <div style="border: 1px solid black; padding: 2px; display: inline-block;">N/A</div>
(Business Name) | is a Class A Business as defined in City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186. A copy of the City of Fort Lauderdale current year Business Tax Receipt <u>and</u> a complete list of full-time employees and evidence of their addresses shall be provided within ten (10) calendar days of a formal request by the City. |
| (2) | <div style="border: 1px solid black; padding: 2px; display: inline-block;">N/A</div>
(Business Name) | is a Class B Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186. A copy of the Business Tax Receipt <u>or</u> a complete list of full-time employees and evidence of their addresses shall be provided within ten (10) calendar days of a formal request by the City. |
| (3) | <div style="border: 1px solid black; padding: 2px; display: inline-block;">N/A</div>
(Business Name) | is a Class C Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186. A copy of the Broward County Business Tax Receipt shall be provided within ten (10) calendar days of a formal request by the City. |
| (4) | <div style="border: 1px solid black; padding: 2px; display: inline-block;">N/A</div>
(Business Name) | is a Class D Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186, and does not qualify for Local Preference consideration. |
| (5) | <div style="border: 1px solid black; padding: 2px; display: inline-block;">N/A</div>
(Business Name) | requests a Conditional Class A classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |
| (6) | <div style="border: 1px solid black; padding: 2px; display: inline-block;">N/A</div>
(Business Name) | requests a Conditional Class B classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |

BIDDER'S COMPANY: Advanced Data Solutions, Inc.

AUTHORIZED
COMPANY
PERSON:

Melody S. Engle

PRINT NAME



SIGNATURE

10/19/2022

DATE

Supplier Response Form

NON-COLLUSION STATEMENT:

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

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

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

 Text Box: 3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more). 3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

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

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

Name

NONE

Relationships

NONE

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

Authorized Signature



Title

President

Name (Printed)

Melody Engle

Date

10/19/2022

Advanced Data Solutions, Inc

Supplier Response Form**CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH
NON-DISCRIMINATION PROVISIONS OF THE CONTRACT**

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to the City Ordinance Sec. 2-187(c), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

The Contractor shall not, in any of his/her/its activities, including employment, discriminate against any individual on the basis of race, color, national origin, religion, creed, sex, disability, sexual orientation, gender, gender identity, gender expression, or marital status.

1. The Contractor certifies and represents that he/she/it will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, as amended by Ordinance C-18-33 (collectively, "Section 2-187").
2. The failure of the Contractor to comply with Section 2-187 shall be deemed to be a material breach of this Agreement, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.
3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.
4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.
5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in section 2-183 of the Code of Ordinances of the City of Fort Lauderdale, Florida.



Authorized Signature

Melody S. Engle, President

Print Name and Title

Date 10/19/2022

Bid #12696-535 - Document and Media Scanning Services **Q & A deadline: Oct 13, 2022 5:00:00 PM EDT**[Print](#)**33 Questions**
1 Unanswered Question**1. 12696-525 - Document and Media Scanning Services**

We have experience to work in Florida for scanning and Laserfiche services. We are Value Added Reseller for Laserfiche. We do not have any facility in Florida to scan document. Are we eligible to bid for your RFP # 12696-535, Document and Media Scanning Services - The City of Fort Lauderdale, Florida (City) RFP? - Sep 28, 2022 12:34:58 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

Refer to Section 3.1.1, Introduction: "The City of Fort Lauderdale (City) requests competitive sealed proposals from qualified firms whose processing facilities are located in the State of Florida..."

Also refer to Section 3.1.4, Service Provisions, Functional and Technical Requirements: "Scanning Facilities (Service Center) - Proposer's scanning and indexing facilities must be located within the State of Florida..."

2. 12696-525 - Document and Media Scanning Services

Can we pick up all the documents and Microfiche in as single trip? - Sep 28, 2022 12:35:15 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

No, pickup is usually done every 2 weeks. The paper documents are held in a warehouse in West Palm Beach, while the microfiche are in our main Development Services Department office in Fort Lauderdale. The vendor that is awarded the contract will be provided with the procedure for pickup.

3. 12696-525 - Document and Media Scanning Services

Are you looking for a local vendor? - Sep 28, 2022 12:35:23 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

Please refer to Question/Answer 1.

4. 12696-525 - Document and Media Scanning Services

Is this a new requirement? If not, can you please provide the name of the vendor, the current contract value and eligibility criteria to re-compete? - Sep 28, 2022 12:35:26 AM EDT

Answer - Oct 04, 2022 10:09:11 AM EDT

There is an existing contract with Advanced Data Solutions, Inc.; however, the scope and requirements have been revised for this new solicitation. All interested vendors must submit their proposals based on the requirements outlined in this new solicitation.

5. 12696-525 - Document and Media Scanning Services

What is the level of preparation required? (Removal of fasteners, staples, post-it's, etc.) - Sep 28, 2022 12:35:34 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

The paper documents may have staples; the flats are not attached.

6. 12696-525 - Document and Media Scanning Services

Do we need to provide the digitized documents in specific folder structure? - Sep 28, 2022 12:35:47 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

It would be preferable if the documents are in the Laserfiche Briefcase format.

7. 12696-525 - Document and Media Scanning Services

Do we need to apply any naming convention to files - Sep 28, 2022 12:35:50 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

The paper documents scanned should be indexed using address and permit number. The microfiche will have to be indexed by both the mailing and legal address, lot, and block number.

8. 12696-525 - Document and Media Scanning Services

Are all of the microfiche jackets in good condition? - Sep 28, 2022 12:35:58 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

The microfiche jackets are in fair to good condition.

9. 12696-525 - Document and Media Scanning Services

Do we need to scan B&W or Color? If color, then what % of documents are color? - Sep 28, 2022 12:36:07 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

All scans are in black and white.


10. 12696-525 - Document and Media Scanning Services

Will each microfiche jacket become a multipage PDF? Please confirm - Sep 28, 2022 12:36:13 AM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

Yes, each jacket can have multipage PDF.


11. 12696-525 - Document and Media Scanning Services

2.17 Minimum Qualifications - Shouldn't the vendor have a minimum of 3-5 years experience in Laserfiche and be able to prove it? - Sep 28, 2022 1:00:50 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

Refer to Section 2.17, Minimum Qualifications: "Proposers must demonstrate that they, or the key staff assigned to the project, have successfully provided services with similar magnitude to those specified in the scope of services to at least one entity similar in size and complexity to the City of Fort Lauderdale or can demonstrate they have the experience with large scale private sector clients and the managerial and financial ability to successfully perform the work..."


12. 12696-525 - Document and Media Scanning Services

3.1.2 Scope of work. Should you add the that the City wants Laserfiche Briefcase that hold the Images and metadata? Not just the ability to create TIFF's and PDF's? - Sep 28, 2022 1:05:33 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

Laserfiche briefcase format should be used.


13. 12696-525 - Document and Media Scanning Services

We are a company with a national, state, and with a local presence here in Broward County. Our company is also the largest scanning and imaging processing provider in the USA. We work with federal, state, and local governments throughout the country, including the City of Fort Lauderdale Print Shop. We have decades of experience in document imaging services. Our scanning and processing facilities are SOC2 certified by Pricewaterhouse Coopers and all our business processes are documented and verifiable.

Our scanning facility is in Duluth, GA and is just outside the state of Florida. Our logistics team can transport and secure your documents according to your requirements in a timely manner without issue. Furthermore, our processing facility runs 24 hours a day which gives us a competitive advantage over most local vendors. We are already a valued business partner with the City of Fort Lauderdale and were curious if you would consider our proposal even though the scanning facility is not located in Florida? Thank you. - Sep 28, 2022 2:04:28 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

Please refer to Question/Answer 1.


14. 12696-525 - Document and Media Scanning Services

1. Do you require that the same vendor provide services both for Group 1 (Scanning, Indexing, Imaging and Media Conversion Services) and Group 2 (Microfiche Conversion Services)? We are very interested in bidding if we can do so only for Group 1. - Sep 28, 2022 2:57:02 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

No. It is the intent of the City to award one Proposer for each particular Group; therefore, each Proposer must submit pricing on all the services described within a Group.

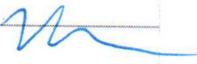

15. 12696-525 - Document and Media Scanning Services

There is mention of a Permit number in the Indexing requirements. Is there a source system at City of FLauderdale in use which could export the permit number as well as the legal description, block, lot and street address? Also - How many characters is a Permit Number? - Sep 28, 2022 4:05:48 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

The permit numbers are on the paper documents to be scanned, the block, lot and street addresses are on the flats. Once the vendor has confirmed completion of a batch, we verify internally using our database that the document is scanned and indexed in Laserfiche using said permit number, block, lot, and street address.

Permit numbers are alpha numeric, and the number of characters varies depending on the type of permit. This can be anywhere between 5 - 25 characters.


16. 12696-525 - Document and Media Scanning Services

Can you provide an average document size in pages(or inches if it's a file)? or does 1 document = 1 image? And do you have a database with permit information readily available for the documents? - Sep 28, 2022 4:08:45 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

The number of pages and size varies; the size can be between 8.5 x 11 and 2ft x 3ft.

Once the vendor has confirmed completion of a scanning a batch, we verify internally using our database that the document is scanned and indexed in Laserfiche using the permit number, block, lot, and street address.

17. 12696-525 - Document and Media Scanning Services

If we have a paper records scanning facility located in Broward County(completing Group 1 of the Scope), but our Microfiche Scanning facility is in another state, can we still bid on Group 2?

Can we confirm an estimate of 500,000 fiche jackets? OR does 500,000 represent total estimated fiche images?

Are the indexing requirements featured across the top of each fiche or is the vendor to read the first image to obtain the indexing data?

Is there anything featured across the top header of the physical fiche? - Sep 28, 2022 4:10:54 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

1. Please refer to Question/Answer 1.

2. The City has an estimate of 300,000 fiche jackets and each fiche holds an estimate of 8 images.

3. Yes, the indexing requirements are featured across the top.

4. Yes, the Legal and mailing address, block, and lot numbers.

18. 12696-525 - Document and Media Scanning Services

Is the material boxed up and ready to be taken offsite?

Will there be support in moving the boxes to our trucks?

Are other supplies(boxes, labor) needed for the transfer to the supplier? - Sep 28, 2022 4:12:38 PM EDT

Answer - Oct 04, 2022 10:00:27 AM EDT

1. Yes, all will be boxed and ready for pickup.

2. No, the vendor will be required to move the boxes to the truck.

3. Per Section 3.1.2, Scope of Work - "Proposer shall provide all labor, materials, tools, and equipment required for the Services for all City departments requesting Services under Contract"

19. 12696-525 - Document and Media Scanning Services

p.8 section 2.13 - Non-Exclusive Contract

Please explain section 2.13 - Non-Exclusive Contract clause. The RFP details volume for three types of document and media scanning services. If awarded, will the document and media scanning services described herein be awarded to a single Vendor? Or would the awarded vendor merely be an approved vendor? Is this a "license to hunt" RFP? - Oct 10, 2022 5:11:17 PM EDT

Answer - Oct 11, 2022 2:19:48 PM EDT

Section 2.13 is the City's standard procurement language. The City of Fort Lauderdale can award an additional contract to additional vendor(s) for similar services if deemed necessary. It is the intent of the City to award one Proposer for each particular Group; therefore, each Proposer must submit pricing on all the services described within a Group.

20. 12696-525 - Document and Media Scanning Services

As per your language in Section 3.1.4 ("Proposer will have to obtain prior approval of the respective City department/division and the Information Technology Services (ITS) Department."), can we seek prior approval at this time to leverage our secure cloud infrastructure outside the State of Florida to support our scanning and indexing services performed within the State of Florida? - Oct 10, 2022 5:12:36 PM EDT

Answer - Oct 11, 2022 2:19:48 PM EDT

Prior approval cannot be obtained at this time.

21. 12696-525 - Document and Media Scanning Services

On average, how many sheets of paper are included in a single document? - Oct 10, 2022 5:12:55 PM EDT

Answer - Oct 11, 2022 2:19:48 PM EDT

The number of pages varies based on the type of project. On average between two to hundreds.

22. 12696-525 - Document and Media Scanning Services

How many pages are in your average folder? - Oct 10, 2022 5:13:33 PM EDT

Answer - Oct 11, 2022 2:19:48 PM EDT

This varies depending on the project size.

23. 12696-525 - Document and Media Scanning Services

Is a submission extension possible? - Oct 10, 2022 5:13:51 PM EDT

Answer - Oct 11, 2022 2:19:48 PM EDT

At this time, there are no intentions to extend the due date.



24. 12696-525 - Document and Media Scanning Services

1. For the cost proposal page, please advise if there is a excel file. If there is not, please let us know if we need to respond via PDF or word documents - Oct 11, 2022 9:45:15 AM EDT

Answer - Oct 11, 2022 2:19:48 PM EDT

There is not an Excel file for this page. The completed Cost Proposal Page should be uploaded with your other proposal documents.



25. 12696-525 - Document and Media Scanning Services

2. Please advise if we can modify the cost proposal table by adding columns or row? - Oct 11, 2022 9:45:52 AM EDT

Answer - Oct 11, 2022 2:19:48 PM EDT

The Cost Proposal Page should not be modified.



26. 12696-525 - Document and Media Scanning Services

Section 3.1.9 states the following:

Scanning will be performed in the same order as the paper is received and prepped.

Rack Document Questions / Inapplicable to Box Scanning

Your rack log sheets serve as the checklist for the permits within each rack. This requires at least 10 feet of working space per bundle. Permit documents are dispersed within each rack and must be compiled to create one document and print set per permit on your list. There are often 10 to 20 piles of individual permits that must be sorted and grouped within each rack to agree to the log. This is extremely time consuming. Thus, scanning in the order received is not applicable.

Is your process changing such that permits will all be group and can be scanned in order without the need of the time-consuming sorting process?

Along the same lines, your signature envelopes often contain up to 20 different permit documents. These envelopes must be opened and documents must sorted, by permit, on every bundle as they are comingled. This is time consuming as well and requires attention to detail. The envelopes themselves must also be cut for scanning and designated for only one specific permit, despite over a dozen listed on the outside.

Please confirm if this has changed? - Oct 12, 2022 4:08:10 PM EDT



27. 12696-525 - Document and Media Scanning Services

During our inspection of the boxed building records (daily's), we noted an average of 60 to 64 envelope, permit packages per 1.2 cubic foot standard file box. The envelopes contain listings of contents, permit #'s included, addresses, signatures, approvals and many notes. It is clear that the envelopes are part of the official records and should be scanned. Please confirm they should be scanned? - Oct 13, 2022 1:44:45 PM EDT

Answer - Oct 17, 2022 2:04:25 PM EDT

Yes, confirmed.



28. 12696-525 - Document and Media Scanning Services

During our inspection of the boxed building records (daily's), we noted an average of 60 to 65 envelopes, permit packages per 1.2 cubic foot standard file box. The envelopes contain Master Permits as well as sub-contractor permits, disciplines and revisions. Both the small format and large format records are commingled for all permits therein. To properly organize this, the records need to be sorted such that all permits are grouped in order and with their respective documentation. Otherwise, it will be quite difficult for an end user to determine which documents relate to each other. Please confirm if these records are to be sorted and organized prior to scanning? - Oct 13, 2022 2:01:57 PM EDT

Answer - Oct 17, 2022 2:04:25 PM EDT

Yes. The City has put them together already so they can be scanned with the proper permit. If each form is indexed properly, our systems will pull them together when needed.



29. 12696-525 - Document and Media Scanning Services

During our inspection of the boxed building records (daily's), we noted an average of 60 to 65 envelope, permit packages per 1.2 cubic foot standard file box. The envelopes contain listings of contents, permit #'s included, addresses, signatures, approvals and many notes. It is clear that the envelopes are part of the official records and should be scanned. Please confirm they should be scanned? (Submitted: Oct 13, 2022 1:44:45 PM EDT) - Oct 13, 2022 2:03:28 PM EDT

Answer - Oct 17, 2022 2:04:25 PM EDT
Yes, confirmed.



30. 12696-525 - Document and Media Scanning Services

ITEM 1.2 Specifies E size drawings. Are drawings 36" X 42" or 36" x 48"? Are there other sizes to be scanned, i.e., 24" x 36"? - Oct 13, 2022 3:07:25 PM EDT

Answer - Oct 17, 2022 2:04:25 PM EDT
The City has both 36 x 42 and 36 x 48. The majority are 36 x 42. The City also has Ledger 11 x 17 / Legal 8 1/2 x 14.



31. 12696-525 - Document and Media Scanning Services

ITEM 1.3. Specifies Destruction of Documents. Does the Destruction of Documents also include the drawings? - Oct 13, 2022 3:08:45 PM EDT

Answer - Oct 17, 2022 2:04:25 PM EDT
Yes.



32. 12696-525 - Document and Media Scanning Services

ITEM 1.4. Specifies a quantity of 7 million. Does the 7 million represent the number of documents or the number of pages to be indexed? - Oct 13, 2022 3:10:47 PM EDT

Answer - Oct 17, 2022 2:04:25 PM EDT
Documents.



33. 12696-525 - Document and Media Scanning Services

ITEM 2.2 specifies Destruction of Documents after the scanning and review is complete. Does the quantity of 500,000 represent the number of microfiche (Film) to be destroyed and is the unit per microfiche? - Oct 13, 2022 3:12:48 PM EDT

Answer - Oct 17, 2022 2:04:25 PM EDT
500,000 sleeves of microfiche.



Results Per Page: 5

 10/19/22

Supplier Response Form

REFERENCES

A minimum of three (3) references shall be provided:

- 1. Company Name:** City of Coral Gables *

405 Biltmore Way
Coral Gables, FL 33134

Address: *

Contact: Desiree Liguori *

Phone #: 305-569-1848 * **Email:** dliguori@coralgables.com *

Contract Value: \$154,000.00 * **Year:** 2022 *

Description: ADS began converting small and large format documents for the City during 2021 to current. Since that time, we have converted small and large format documents for Development Services, Public Works, Historical, Police, Legal, Human Resources and Historical. All records are imported into the *
- 2. Company Name:** City of Tamarac *

7525 NW 88th Ave.
Tamarac, FL 33321

Address: *

Contact: Monica Barros *

Phone #: 954-597-3501 * **Email:** monica.barros@tamarac.org *

Contract Value: \$75,000.00 * **Year:** 2022 *

Description: ADS began converting small and large format documents for the City during 2018 to current. Since that time, we have converted nearly 1 million small and large format documents for multiple city departments. All records are imported into the City's Laserfiche system using Laserfiche *
- 3. Company Name:** Oconee County Georgia *

23 North Main Street
Watkinsville, Georgia 30677

Address: *

Contact: Alex Newell *

Phone #: 706-310-3520 * **Email:** anewell@oconee.ga.us *

Contract Value: \$210,000.00 * **Year:** 2022 *

Description: In 2018, ADS implemented a county-wide Laserfiche records management system. The system has grown to service 40 end users within various departments of the County. We designed multiple repositories during the initial implementation and subsequent thereto (folder structures, indexing schemes, *

4. Company Name: Collier County Florida

2800 North Horseshoe Drive
Naples, Florida 34104

Address:

Contact: Danny Condomina

Phone #: 239-252-6866

Email: Danny.Condomina@colliercountyfl.gov

Contract Value: \$380,000.00

Year: 2022

Description: ADS began converting small and large format documents for the County during 2019. In total, we have converted over 5 million small format documents and over 400 thousand wide format documents. In addition, during 2020 we converted over a thousand rolls of microfilm consisting of over a

5. Company Name: Orange County Florida

201 South Rosalind Street
Orlando, Florida 32802

Address:

Contact: Aneta Duhigg

Phone #: 407-836-5873

Email: Aneta.Duhigg@ocfl.net

Contract Value: \$606,000.00

Year: 2022

Description: ADS was contracted for the conversion of millions of small / large format, microfilm and microfiche images initially as part of a basic conversion project in 2004. The project outlined specific volume milestones and required close teamwork with client project team members. After project

**CITY OF FORT
LAUDERDALE GENERAL
CONDITIONS**

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

PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:

- 1.01 BIDDER ADDRESS:** The City maintains automated vendor address lists that have been generated for each specific Commodity Class item through our bid issuing service, BidSync. Notices of Invitations to Bid (ITB'S) are sent by e-mail to the selection of bidders who have fully registered with BidSync or faxed (if applicable) to every vendor on those lists, who may then view the bid documents online. Bidders who have been informed of a bid's availability in any other manner are responsible for registering with BidSync in order to view the bid documents. There is no fee for doing so. If you wish bid notifications be provided to another e-mail address or fax, please contact BidSync. If you wish purchase orders sent to a different address, please so indicate in your bid response. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 PACKING SLIPS:** It will be the responsibility of the awarded Contractor, to attach all packing slips to the OUTSIDE of each shipment. Packing slips must provide a detailed description of what is to be received and reference the City of Fort Lauderdale purchase order number that is associated with the shipment. Failure to provide a detailed packing slip attached to the outside of shipment may result in refusal of shipment at Contractor's expense.
- 1.04 PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 45 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.05 TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.06 BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by the City for a period of one hundred twenty (120) days from the date of bid opening unless otherwise stated in the ITB.
- 1.07 VARIANCES:** For purposes of bid evaluation, Bidders must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.

By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared by the City as conditional.

- 1.08 NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.09 MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its procurement activities. If your firm qualifies in accordance with the below definitions, please indicate in the space provided in this ITB.

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

The term "Minority Business Enterprise" means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence,

minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

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

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

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

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

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

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

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

1.10 MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION

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

1.11 SCRUTINIZED COMPANIES

Subject to *Odebrecht Construction, Inc., v. Prasad*, 876 F.Supp.2d 1305 (S.D. Fla. 2012), *affirmed*, *Odebrecht Construction, Inc., v. Secretary, Florida Department of Transportation*, 715 F.3d 1268 (11th Cir. 2013), with regard to the "Cuba Amendment," the Contractor certifies that it is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and that it does not have business operations in Cuba or Syria, as provided in Section 287.135, Florida Statutes (2021), as may be amended or revised. The Contractor certifies that it is not on the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2021), as may be amended or revised, and that it is not engaged in a boycott of Israel. The City may terminate this Agreement at the City's option if the Contractor is found to have submitted a false certification as provided under subsection (5) of Section 287.135, Florida Statutes (2021), as may be amended or revised, or been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2021), as may be amended or revised, or is engaged in a boycott of Israel or has been engaged in business operations in Cuba or Syria, as defined in Section 287.135, Florida Statutes (2021), as may be amended or revised.

By submitting a proposal or response, the company, principals, or owners certify that it is not listed on the Scrutinized Companies with Activities in Sudan List or listed on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or is engaged in business operations in Cuba or Syria.

1.12 DEBARRED OR SUSPENDED BIDDERS OR PROPOSERS

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

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

INVITATION TO BID (ITB) The solicitation document used for soliciting competitive sealed bids for goods or services.

INVITATION TO NEGOTIATE (ITN) All solicitation documents, regardless of medium, whether attached to or incorporated by reference in solicitations for responses from firms that invite proposals from interested and qualified firms so the city may enter into negotiations with the firm(s) determined most capable of providing the required goods or services.

REQUEST FOR PROPOSALS (RFP) A solicitation method used for soliciting competitive sealed proposals to determine the best value among proposals for goods or services for which price may not be the prevailing factor in award of the contract, or the scope of work, specifications or contract terms and conditions may be difficult to define. Such solicitation will consider the qualifications of the proposers along with evaluation of each proposal using identified and generally weighted evaluation criteria. RFPs may include price criteria whenever feasible, at the discretion of the city.

REQUEST FOR QUALIFICATIONS (RFQ) A solicitation method used for requesting statements of qualifications in order to determine the most qualified proposer for professional services.

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

PROPOSAL – a proposal received in response to an RFP.

BIDDER – Person or firm submitting a Bid.

PROPOSER – Person or firm submitting a Proposal.

RESPONSIVE BIDDER – A firm who has submitted a bid, offer, quote, or response which conforms in all material respects to the competitive solicitation document and all of its requirements.

RESPONSIBLE BIDDER – A firm who is fully capable of meeting all requirements of the solicitation and subsequent contract. The respondent must possess the full capability, including financial and technical, ability, business judgment, experience, qualifications, facilities, equipment, integrity, capability, and reliability, in all respects to perform fully the contract requirements and assure good faith performance as determined by the city.

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

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

CONTRACTOR – Any firm having a contract with the city. Also referred to as a "Vendor".

CONTRACT – All types of agreements, including purchase orders, for procurement of supplies, services, and construction, regardless of what these agreements may be called.

CONSULTANT – A firm providing professional services for the city.

2.02 SPECIAL CONDITIONS: Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,**PART III BIDDING AND AWARD PROCEDURES:****3.01 SUBMISSION AND RECEIPT OF BIDS:** To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidders should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB

issued by the City. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Procurement Office, or other designated area, in the presence of Bidders, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidders and the public in accordance with applicable regulations.

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

Page 2

Rev. 8/2022

- 3.03 PRICES QUOTED:** Deduct trade discounts, and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption number for EIN is 59-6000319, and State Sales tax exemption number is 85-8013875578C-1.
- 3.05 WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in the bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in the bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.
- 3.07 MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet or exceed these items, and feels that the technical specifications are overly restrictive, the bidder must notify the Procurement Services Division immediately. Such notification must be received by the Procurement Services Division prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle the bidder to any relief from the conditions imposed in the contract.
- 3.09 SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested, should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.

- 3.12 USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Chief Procurement Officer reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond or cashier's check. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 PUBLIC RECORDS/TRADE SECRETS/COPYRIGHT:** The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes.

Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as public records. In addition, the proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as exempt from disclosure or confidential. Proposals bearing copyright symbols or otherwise purporting to be subject to copyright protection in full or in part may be rejected. The proposer authorizes the City to publish, copy, and reproduce any and all documents submitted to the City bearing copyright symbols or otherwise purporting to be subject to copyright protection.

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

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- 3.16 PROHIBITION OF INTEREST:** No contract will be awarded to a bidding firm which has City elected officials, officers or employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.
- 3.17 RESERVATIONS FOR AWARD AND REJECTION OF BIDS:** The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.
- If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, is at the sole option of the City.
- 3.18 LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.
- 3.19 BID PROTEST PROCEDURE:** Any proposer or bidder who is not recommended for award of a contract and who alleges a failure by the City to follow the City's Procurement Ordinance or any applicable law may protest to the Procurement Division – Deputy Director of Finance, by

delivering a letter of protest within five (5) days after a Notice of Intent to award is posted on the City's website at the following link:
<https://www.fortlauderdale.gov/government/departments-a-h/finance/procurement-services/notices-of-intent-to-award>

The complete protest ordinance may be found on the City's web site at the following link:

https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeId=COOR_CH2AD_ARTVFI_DIV2PR_S2-182DIREPRAWINAW

PART IV BONDS AND INSURANCE

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

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

- 4.02 INSURANCE:** The Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

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

PART V PURCHASE ORDER AND CONTRACT TERMS:

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

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

- 5.02 ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.

- 5.03 SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupation Safety and Health Act of 1970 as amended.

- 5.04 ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB the bidder will supply only material or equipment that is 100% asbestos free.

- 5.05 OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, the bidder may, if the bidder has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.

- 5.06 VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications which are in writing from an authorized City representative may be considered. Only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, will be recognized by the City as duly authorized expressions on behalf of Contractors.

- 5.07 INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, procurement policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.
- 5.08 INDEMNITY/HOLD HARMLESS AGREEMENT:** Contractor shall protect and defend at Contractor's expense, counsel being subject to the City's approval, and indemnify and hold harmless the City and the City's officers, employees, volunteers, and agents from and against any and all losses, penalties, fines, damages, settlements, judgments, claims, costs, charges, expenses, or liabilities, including any award of attorney fees and any award of costs, in connection with or arising directly or indirectly out of any act or omission by the Contractor or by any officer, employee, agent, invitee, subcontractor, or sublicensee of the Contractor. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.
- 5.09 TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.
- 5.10 TERMINATION FOR CONVENIENCE:** The City reserves the right, in the City's best interest as determined by the City, to cancel any contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this contract. The Contractor agrees to make available to the City Auditor or the City Auditor's designee, during normal business hours and in Broward, Miami-Dade or Palm Beach Counties, all books of account, reports, and records relating to this contract. The Contractor shall retain all books of account, reports, and records relating to this contract for the duration of the contract and for three years after the final payment under this Agreement, until all pending audits, investigations or litigation matters relating to the contract are closed, or until expiration of the records retention period prescribed by Florida law or the records retention schedules adopted by the Division of Library and Information Services of the Florida Department of State, whichever is later.
- 5.13 PERMITS, TAXES, LICENSES:** The successful Contractor shall, at his/her/its own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under this contract.
- 5.14 LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.
- NON-DISCRIMINATION:** The Contractor shall not, in any of its activities, including employment, discriminate against any individual on the basis of race, color, national origin, age, religion, creed, sex, disability, sexual orientation, gender, gender identity, gender expression, marital status, or any other protected classification as defined by applicable law.
1. The Contractor certifies and represents that the Contractor will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, (2019), as may be amended or revised, ("Section 2-187"), during the entire term of this Agreement.
 2. The failure of the Contractor to comply with Section 2-187 shall be deemed to be a material breach of this Agreement, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.
 3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.
 4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.
 5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in section 2-183 of the Code of Ordinances of the City of Fort Lauderdale, Florida.
- 5.15 UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party of the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required prior items or services, then the Contractor may request adjustments to the costs to the City to

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

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

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

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- 5.16 ELIGIBILITY:** If applicable, the Contractor must first register with the Florida Department of State in accordance with Florida Statutes, prior to entering into a contract with the City.
- 5.17 PATENTS AND ROYALTIES:** The Contractor, without exception, shall defend, indemnify, and hold harmless the City and the City's employees, officers, employees, volunteers, and agents from and against liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including their use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include any and all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.
- 5.18 ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Commission or the City Manager or City Manager's designee, depending on original award approval.
- 5.19 GOVERNING LAW; VENUE:** The Contract shall be governed by and construed in accordance with the laws of the State of Florida. Venue for any lawsuit by either party against the other party or otherwise arising out of the Contract, and for any other legal proceeding, shall be in the courts in and for Broward County, Florida, or in the event of federal jurisdiction, in the Southern District of Florida.
- 5.20 PUBLIC RECORDS:**

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT PRRCONTRACT@FORTLAUDERDALE.GOV, 954-828-5002, CITY CLERK'S OFFICE, 100 N. ANDREWS AVENUE, FORT LAUDERDALE, FLORIDA 33301.

Contractor shall comply with public records laws, and Contractor shall:

1. Keep and maintain public records required by the City in order to perform the service.
2. Upon request from the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes (2021), as may be amended or revised, or as otherwise provided by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of this Agreement if the Contractor does not transfer the

records to the City.

4. Upon completion of the Agreement, transfer, at no cost, to the City all public records in possession of the Contractor or keep and maintain public records required by the City to perform the service. If the Contractor transfers all public records to the City upon completion of this Agreement, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of this Agreement, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City, upon request from the City's custodian of public records, in a format that is compatible with the information technology systems of the City.

NON-COLLUSION STATEMENT:

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

Any Cityof LauderdaleFL officeror intowriting of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

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

Text Box: 3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more). 3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

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

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

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

Authorized Signature	Title
Name (Printed)	Date

CONTRACT PAYMENT METHOD

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to credit card payments via MasterCard or Visa as part of this program.

This allows you as a vendor of the City of Fort Lauderdale to receive your payments fast and safely. No more waiting for checks to be printed and mailed.

In accordance with the contract, payments on this contract will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, bidders must presently have the ability to accept these credit cards or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

All costs associated with the Contractor's participation in this purchasing program shall be borne by the Contractor. The City reserves the right to revise this program as necessary.

By signing below you agree with these terms.

Please indicate which credit card payment you prefer:

☐ MasterCard

☒ Visa

Advanced Data Solutions, Inc
Company Name

John Civala
Name (Printed)

9/29/2022
Date

John Civala
Signature

jcivale@adsus.net
Title

**CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH
NON-DISCRIMINATION PROVISIONS OF THE CONTRACT**

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to the City Ordinance Sec. 2-187(c), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

The Contractor shall not, in any of his/her/its activities, including employment, discriminate against any individual on the basis of race, color, national origin, religion, creed, sex, disability, sexual orientation, gender, gender identity, gender expression, or marital status.

1. The Contractor certifies and represents that he/she/it will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, as amended by Ordinance C-18-33 (collectively, "Section 2-187").
2. The failure of the Contractor to comply with Section 2-187 shall be deemed to be a material breach of this Agreement, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.
3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.
4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.
5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in [section 2-183](#) of the Code of Ordinances of the City of Fort Lauderdale, Florida.

Authorized Signature

Print Name and Title

Date



DISADVANTAGED BUSINESS ENTERPRISE (DBE) PREFERENCE

Section 2-185, Code of Ordinances of the City of Fort Lauderdale, provides for a disadvantaged business enterprise preference.

In order to be considered for a DBE Preference, a bidder must include a certification from a government agency, as applicable to the DBE Preference class claimed **at the time of bid submittal**.

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

- a) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **or** State of Florida active registration **and/or**
- b) List of the names of all employees of the bidder and evidence of employees' residences within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the disadvantaged business enterprise preference.

THE COMPLETE DBE PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK: https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeId=COOR_CH2AD_ARTVFI_DIV2PR_S2-185EQOPDIBUEN&showChanges=true

Definitions

- a. The term "disadvantaged class 1 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the City, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- b. The term "disadvantaged class 2 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the City with full-time employees and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- c. The term "disadvantaged class 3 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

- d. The term “disadvantaged class 4 enterprise” shall mean any disadvantaged business enterprise that does not qualify as a Class 1, Class 2, or Class 3 business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City’s Procurement Manual.

DISADVANTAGED BUSINESS ENTERPRISE CERTIFICATION STATEMENT

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

- | | | |
|-----|-----------------|--|
| (1) | (Business Name) | is a disadvantaged Class 1 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the City, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. |
| (2) | (Business Name) | is a disadvantaged Class 2 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the City with full-time employee(s) and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. |
| (3) | (Business Name) | is a disadvantaged Class 3 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. |
| (4) | (Business Name) | is a disadvantaged Class 4 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that does not qualify as a Class 1, Class 2, or Class 3 business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual. |
| (5) | (Business Name) | requests a Conditional Class 1 classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |
| (6) | (Business Name) | requests a Conditional Class 2 classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |

BIDDER'S COMPANY: **Advanced Data Solutions, Inc**

AUTHORIZED PERSON:	COMPANY	John Civale	John Civale	10/18/2022
		PRINT NAME	SIGNATURE	DATE

Forms Non-Iso – revised 7/2/2021

LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

Section 2-186, Code of Ordinances of the City of Fort Lauderdale, (Ordinance No. C-17-26), provides for a local business preference.

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

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

- a) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **and**
- b) List of the names of all employees of the bidder and evidence of employees' residences within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

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

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

https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeId=COOR_CH2AD_ARTVFI_DIV2PR_S2-186LOBUPR&showChanges=true

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

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

LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

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

- | | | |
|-----|-----------------|--|
| (1) | (Business Name) | is a Class A Business as defined in City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186. A copy of the City of Fort Lauderdale current year Business Tax Receipt <u>and</u> a complete list of full-time employees and evidence of their addresses shall be provided within ten (10) calendar days of a formal request by the City. |
| (2) | (Business Name) | is a Class B Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186. A copy of the Business Tax Receipt <u>or</u> a complete list of full-time employees and evidence of their addresses shall be provided within ten (10) calendar days of a formal request by the City. |
| (3) | (Business Name) | is a Class C Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186. A copy of the Broward County Business Tax Receipt shall be provided within ten (10) calendar days of a formal request by the City. |
| (4) | (Business Name) | is a Class D Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec. 2-186, and does not qualify for Local Preference consideration. |
| (5) | (Business Name) | requests a Conditional Class A classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |
| (6) | (Business Name) | requests a Conditional Class B classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent to meet the requirements shall be provided to the City within three (3) months of entering into a contract with the City. |

BIDDER'S COMPANY: **Advanced Data Solutions, Inc.**

AUTHORIZED PERSON:	COMPANY	John Civale	John Civale	jcivale@adsus.net
		PRINT NAME	SIGNATURE	DATE

Forms Non-ISO – Revised 7/2/2021

E-VERIFY AFFIRMATION STATEMENT

RFP/Bid /Contract No:

Project Description: **12696-535**

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- (a) all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- (b) all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Contractor/Proposer/ Bidder Company Name:

Authorized Company Person's Signature:

Authorized Company Person's Title:

Date:

BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder to ensure that his bid is submitted electronically through www.BidSync.com prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) **Advanced Data Solutions, Inc.** EIN (Optional):

Address: **141 Scarlet Blvd Suite A**

City: **Oldsmar** State: **FL** Zip: **34677**

Telephone No.: **9545534009** FAX No.: **8138553545** Email: **jcivale@adsus.net**

Delivery: Calendar days after receipt of Purchase Order (**section 1.02 of General Conditions**): **30 days**

Total Bid Discount (**section 1.05 of General Conditions**): **0**

Check box if your firm qualifies for MBE / SBE / WBE (**section 1.09 of General Conditions**): ☒

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

<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>
0	10/18/2022				

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A. **You must also click the "Take Exception" button.**

None

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal.

I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

John Civale
Name (printed)

09/29/2022
Date

John Civale
Signature

SVP
Title

Revised 4/28/2020

REFERENCES

A minimum of three (3) references shall be provided:

1. Company Name: City of Coral Gables

Address: **405 Biltmore Way**

Coral Gables, FL 33134

Contact: **Desiree Liguori**

Phone #: **305-569-1848** Email: **dliguori@coralgables.com**

Contract Value: **\$154,000.00** Year: **2022**

Description: **ADS began converting small and large format documents for the City during 2021 to current. Since that time, we have converted small and large format documents for Development Services, Public Works, Historical, Police, Legal, Human Resources and Historical. All records are imported into the City's Laserfiche using Laserfiche briefcases designed for specific document types. Data is extracted from the City's Laserfiche permitting system into batch-specific excel files. Data from the files is used for a custom Laserfiche workflow which populates metadata into index fields designed by both ADS and the City. Services are ongoing. We have converted nearly 1 million small format pages and 132,000 large format prints and millions of metadata entries for the city. In addition, we have converted 15,000 microfiche images & 424,000 microfilm images.**

City of Coral Gables is on a bi-weekly rotation schedule for conversion services. We typically complete each batch within a few days of pick-up.

2. Company Name: City of Tamarac

Address: **7525 NW 88th Ave.**

Tamarac, FL 33321

Contact: **Monica Barros**

Phone #: **954-597-3501** Email: **monica.barros@tamarac.org**

Contract Value: **\$75,000.00** Year: **2022**

Description: **ADS began converting small and large format documents for the City during 2018 to current. Since that time, we have converted nearly 1 million small and large format documents for multiple city departments. All records are imported into the City's Laserfiche system using Laserfiche briefcases designed for specific document types. Metadata is manually captured from client logs and folder descriptions. The metadata is then used for a custom Laserfiche workflow which populates metadata into index fields designed by both ADS and the City. Services are ongoing.**

3. Company Name: Oconee County Georgia

Address: **23 North Main Street**

Watkinsville, Georgia 30677

Contact: **Alex Newell**

Phone #: **706-310-3520** Email: **anewell@oconee.ga.us**

Contract Value: **\$210,000.00** Year: **2022**

Description: **In 2018, ADS implemented a county-wide Laserfiche records management system. The system has grown to service 40 end users within various departments of the County. We designed multiple repositories during the initial implementation and subsequent thereto (folder structures, indexing schemes, password security, drop-down menus, search routines, and extensive OCR).**

ADS began converting small and large format documents for the County during 2018. At that time, we began the back-file conversion of thousands of pages of historical documents for the County Clerk's office. In total, we have converted 2.5 million small format documents and 63 thousand wide format documents.

Paper scanning services are and Laserfiche support is ongoing countywide. We work with various departments including County Clerk, Finance, Public Works, Clerk of Courts, Code Enforcement and Planning & Zoning. Each department maintains separate Laserfiche repositories of which we have been instrumental in the design and maintenance of multi-level Laserfiche templates.

4. Company Name: Collier County Florida

Address: **2800 North Horseshoe Drive**

Naples, Florida 34104

Contact: **Danny Condomina**

Phone #: **239-252-6866** Email: **Danny.Condomina@colliercountyfl.gov**

Contract Value: **\$380,000.00** Year: **2022**

Description: **ADS began converting small and large format documents for the County during 2019. In total, we have converted over 5 million small format documents and over 400 thousand wide format documents. In addition, during 2020 we converted over a thousand**

rolls of microfilm consisting of over a million images. Nearly all of our services have been performed for the Growth Management area.

Services are ongoing.

5. Company Name: Orange County Florida

Address: **201 South Rosalind Street**

Orlando, Florida 32802

Contact: **Aneta Duhigg**

Phone #: **407-836-5873** Email: **Aneta.Duhigg@ocfl.net**

Contract Value: **\$606,000.00** Year: **2022**

Description: **ADS was contracted for the conversion of millions of small / large format, microfilm and microfiche images initially as part of a basic conversion project in 2004. The project outlined specific volume milestones and required close teamwork with client project team members. After project commencement, multiple technical issues were encountered which required significant research, beta testing and custom programming. ADS provided industry expertise beyond the scope of the contract which resulted in a best of breed solution that exceeded expectations and product timeline deliverables. Our industry expertise facilitated the immediate creation of a custom interface and program designed specifically for a client's unique operating environment. Over 20 million images and 100 million indices have been successfully implemented within this client's system over the last 10 years. Our contract extends to all departments within the County and has included the County Administrator's Office, Contracts and Legal, Planning & Zoning, Environmental Protection, Public Works, Research / Growth Management. Services are ongoing**