

Records Management Consulting Services

For the

**City of Margate
Florida**

October 11, 2018

Proposal and Statement of Qualifications

**Matt Daugherty
Steve M. Lewis, Inc.
Executive Vice President
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Vero Beach, Florida 32961
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www.smlinfo.net**

October 11, 2018

Joseph J. Kavanagh, MMC
City Clerk
City of Margate, City Clerk's Office
5790 Margate Blvd.
Margate, FL 33063
Email: jjkavanagh@margatefl.com

Joseph,

It has been a pleasure to work with the City over the past several years. I'm very thankful for your continued confidence in our firm and I appreciate the dedication that you've put towards the City's records program. This document serves to clarify the scope of services and the new fee for Daily Consulting Services to assist the City of Margate (Agency) in implementing and maintaining the City's Records Management Program.

Section 257.36, Florida Statute mandates every public agency to establish and maintain a records management program to ensure the economical and efficient management of agency information. To meet this mandate, a records program must be formalized and administered with key components established in writing. All decision-making effecting the management of information, either directly or indirectly (e.g. policy/procedure development, technology implementation, etc.) should consider the agency's Records Management Program standards and goals.

Implementation services would include on-site technical assistance of nearly any records related service including records collection review, training, identifying records eligible for destruction, implementation of a file code systems, indexing, network review and technical assistance.

The fee for on-site consulting services is \$2,000.00 per business day (not to exceed eight-hours) billed per visit. This sum includes all related travel costs.

PROFESSIONAL EXPERIENCE

Steve M. Lewis, Inc., has worked with numerous agencies on similar projects. This includes the City of Clermont where we have **disposed of nearly 11,000 cubic feet of paper records to date**. We have a similar, on-going Consulting relationships with the City of Coconut Creek, the City of Gulfport, and the City of Doral.

Numerous references are available upon request. I have over sixteen years of professional experience managing Florida Public Records. Immediately prior to my position with Steve M. Lewis, Inc., I served as Records Analyst in the Records and

Information Management Program of the Florida Department of State, State Library and Archives providing technical assistance to all levels of Public Agencies developing statewide policies and procedures; assisting in the operation of the State Records Center and conducting regional seminars on Public Records Law and Public Records Management. I hold a Master of Arts degree in Public History/Historical Administration from Florida State University including coursework in Records and Archives Management.

Our firm has over forty years of professional experience working with nearly every type and size of agency. We provide innovative and comprehensive records and information management consulting services to government agencies and the private sector including Comprehensive Records and Information Management Planning; Records Retention Services; Disposition Services; Email Management; Training; Policy and Procedure Development; Facilities Management; Records Storage; a full range of Imaging Services and Compliance Monitoring. Additionally, we regularly conduct 12-hour seminars for CEU's at FSU, UCF, FAU and FIU on Public Records Law and Public Records Management. These seminars are certified for credit by the IIMC for the Certified Municipal Clerk and Master Municipal Clerk program and ongoing education. We also conduct public records courses as part of the Florida Department of Revenue College for Tax Collectors and Property Appraisers and the Florida Association of Code Enforcement certification program.

I appreciate the opportunity to work with the city. Please give me a call to discuss any of this you wish.

Sincerely,

A handwritten signature in black ink, appearing to read "Matt Daugherty", written in a cursive style.

Matt Daugherty

Cc: Steve Lewis

List of Recent Florida Clients:

Municipalities

Town of Belleair
City of Clermont
City of Coconut Creek
City of Coral Gables
City of DeBary
City of Doral
City of Fort Walton Beach
City of Gulfport
City of Indian Rocks Beach
City of Madeira Beach
City of Margate
City of North Port
City of Seminole
City of St. Pete Beach
Town of Surfside

Counties

Bay Co. Board of County Commission
Collier Co. School Board
Manatee Co. Tax Collector

State Agencies/Universities

Florida Atlantic University
Florida Department of Revenue
Florida Gulf Coast University
Florida State University
University of Central Florida
University of South Florida

Other

Central Florida Expressway Authority
Florida Association of City Clerks
Florida Association of Court Clerks and
Comptrollers
Florida Association of Code
Enforcement
Florida Government Finance Officers
Association
Florida Records Management
Association
Florida Tax Collectors Association
Tampa Port Authority

ACORDTM**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

10/09/2018

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER USAA INSURANCE AGENCY, INC. 9800 FREDERICKSBURG RD. SAN ANTONIO, TX 78284-9836 800 531-8722	CONTACT NAME PHONE (A/C, No, Ext) 800 531-8722 FAX (A/C, No) 888 900-5380 E-MAIL ADDRESS																					
INSURED STEVE M LEWIS, INC <div style="background-color: black; width: 100px; height: 15px; margin: 5px 0;"></div> <div style="background-color: black; width: 200px; height: 15px; margin: 5px 0;"></div>	<table border="1"> <tr> <th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr> <tr> <td>INSURER A</td><td>Travelers Cas & Surety Co of Am</td><td></td></tr> <tr> <td>INSURER B</td><td></td><td></td></tr> <tr> <td>INSURER C</td><td></td><td></td></tr> <tr> <td>INSURER D</td><td></td><td></td></tr> <tr> <td>INSURER E</td><td></td><td></td></tr> <tr> <td>INSURER F</td><td></td><td></td></tr> </table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A	Travelers Cas & Surety Co of Am		INSURER B			INSURER C			INSURER D			INSURER E			INSURER F		
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COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV NJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<input type="checkbox"/> COMMERCIAL GENERAL LIAB LITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE L MIT APPL ES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						
	AUTOMOBILE LIABILITY						COMB NED S NGLE L MIT (Ea accident) \$ BOD LY INJURY (Per person) \$ BOD LY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y / N (Mandatory in NH) If yes, describe under DESCR PTION OF OPERATIONS below		N / A				WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER <input type="checkbox"/> E L. EACH ACCIDENT \$ E L. DISEASE - EA EMPLOYEE \$ E L. DISEASE - POLICY LIMIT \$
A	Professional Liability			106991392	10/08/2018	10/08/2019	\$1,000,000 per claim \$1,000,000 aggregate

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

City of Margate 5790 Margate Blvd Margate, FL 33063	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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