

SPECIFICATION PACKET



TAXPAYER LOCATION SERVICES 2018

Jessamine County Fiscal Court is seeking sealed bids for Taxpayer Location Services. The Service will be required to locate and collect from businesses that should be paying occupational and/or net profit taxes in Jessamine County. Sealed bids will be accepted at the office of the Jessamine County Judge/Executive, David K. West, Jessamine County Courthouse, 101 North Main Street, Nicholasville, KY 40356 until Monday, February 12, 2018 at 12:00 noon. They will be opened and read publicly on Monday, February 12, 2018 at 12:00 noon at the Jessamine County Courthouse Fiscal Court Room. All bids should be received in a sealed envelope marked "Bid Reply". Specifications may be picked up in the office of Jessamine County Judge/Executive David K. West, Jessamine County Courthouse, 101 North Main Street, Nicholasville, KY 40356 or may be downloaded at www.jessamineco.com. Jessamine County reserves the right to reject any and all bids.

Jessamine County Fiscal Court

Reciprocal Preference for Kentucky Resident Bidders

KRS 45A.490 Definitions for KRS 45A.490 to 45A.494.

As used in KRS 45A.490 to 45A.494:

- (1) "Contract" means any agreement of a public agency, including grants and orders, for the purchase or disposal of supplies, services, construction, or any other item; and
- (2) "Public agency" has the same meaning as in KRS 61.805.

KRS 45A.492 Legislative declarations.

The General Assembly declares:

- (1) A public purpose of the Commonwealth is served by providing preference to Kentucky residents in contracts by public agencies; and
- (2) Providing preference to Kentucky residents equalizes the competition with other states that provide preference to their residents.

KRS 45A.494 Reciprocal preference to be given by public agencies to resident bidders -- List of states -- Administrative regulations.

- (1) Prior to a contract being awarded to the lowest responsible and responsive bidder on a contract by a public agency, a resident bidder of the Commonwealth shall be given a preference against a nonresident bidder registered in any state that gives or requires a preference to bidders from that state. The preference shall be equal to the preference given or required by the state of the nonresident bidder.
- (2) A resident bidder is an individual, partnership, association, corporation, or other business entity that, on the date the contract is first advertised or announced as available for bidding:
 - (a) Is authorized to transact business in the Commonwealth; and
 - (b) Has for one (1) year prior to and through the date of the advertisement, filed Kentucky corporate income taxes, made payments to the Kentucky unemployment insurance fund established in KRS 341.490, and maintained a Kentucky workers' compensation policy in effect.
- (3) A nonresident bidder is an individual, partnership, association, corporation, or other business entity that does not meet the requirements of subsection (2) of this section.
- (4) If a procurement determination results in a tie between a resident bidder and a nonresident bidder, preference shall be given to the resident bidder.
- (5) This section shall apply to all contracts funded or controlled in whole or in part by a public agency.
- (6) The Finance and Administration Cabinet shall maintain a list of states that give to or require a preference for their own resident bidders, including details of the preference given to such bidders, to be used by public agencies in determining resident bidder preferences. The cabinet shall also promulgate administrative regulations in accordance with KRS Chapter 13A establishing the procedure by which the preferences required by this section shall be given.
- (7) The preference for resident bidders shall not be given if the preference conflicts with federal law.
- (8) Any public agency soliciting or advertising for bids for contracts shall make KRS 45A.490 to 45A.494 part of the solicitation or advertisement for bids.

The reciprocal preference as described in KRS 45A.490-494 above shall be applied in accordance with 200 KAR 5:400.

Method of Award

Best Value – Ranking Approach

Jessamine County Fiscal Court intends to award a Contract to the Vendor, whose offer, conforming to the Solicitation, is the most advantageous on the basis of "best value" for all products, services, and requirements contained herein.

An evaluation committee, or a designated individual, will evaluate the information provided by the Vendor in response to the established measurable criteria contained in the Solicitation.

Measurable Criteria:

Price	90 Points
Experience	10 Points

TOTAL POINTS	100 Points
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Each Vendor is responsible for submitting all relevant, factual and correct information with their offer to enable the evaluator(s) to afford each Vendor the maximum score based on the available data submitted by the Vendor. VENDOR SHALL ENTER UNIT PRICE AND TOTAL PRICE ON THE BID SHEET. If adequate space is not available, the Vendor must attach additional information that clearly cross-references the appropriate location in the solicitation (i.e. page number, paragraph, subject, etc.).

Vendors responding with the minimum Best Value requirements in this Solicitation shall not be credited with Best Value points. Vendors responding with greater than the minimum requirements shall receive Best Value points. Failure to provide adequate information will impact the evaluated points awarded to the Vendor.

Price (90 points)

The bidder with the lowest Price receives the maximum score. The bidder with the next lowest Price receives points by dividing the lowest Price by the next lowest price and multiplying that percentage by the available points. For example, 95 points is allocated to the lowest Price criteria for this procurement, Bidder "A" bids \$3.00 as the lowest bidder and receives the maximum 95 points ($\$3.00 / \$3.00 = 1.00 \times 95 = 95$). Assume Bidder "B" is the next lowest bidder at \$4.00, then "B" receives 71.3 points ($\$3.00 / \$4.00 = .75 \times 95 = 71.25$).

Experience- (10 points)

5 years experience is the minimum requirement for this criteria. Points are only given to bidders who exceed the 5 year requirement. The bidder with the greatest number of years experience (not to exceed 10 years for evaluation purposes) receives the maximum number of points. The bidder with the next largest number of years experience, receives points by dividing the next largest number of years experience by the largest number of years experience and multiplying that percentage by the available points. For example, 10 points is allocated to the largest number of years experience, over 5 years, for this procurement, Bidder "A" bids 10 years as the bidder with the largest number of years experience and receives the maximum of 10 points ($10 / 10 = 1.00 \times 10 = 10$). Assume Vendor "B" is the bidder with the next largest number of years experience at 5 years, then "B" receives 5 points ($5 / 10 = .50 \times 10 = 5$).

Vendor shall enter number of year's experience: _____ years

Best Value scoring is subject to **Reciprocal preference for Kentucky resident bidders and Preferences for a Qualified Bidder or the Department of Corrections, Division of Prison Industries (KAR 200 5:410)**.

**REQUIRED AFFIDAVIT FOR BIDDERS, OFFERORS AND
CONTRACTORS CLAIMING
RESIDENT BIDDER STATUS**

FOR BIDS AND CONTRACTS IN GENERAL:

The bidder or offeror hereby swears and affirms under penalty of perjury that, in accordance with KRS 45A.494(2), the entity bidding is an individual, partnership, association, corporation, or other business entity that, on the date the contract is first advertised or announced as available for bidding:

1. Is authorized to transact business in the Commonwealth;
2. Has for one year prior to and through the date of advertisement
 - a. Filed Kentucky corporate income taxes;
 - b. Made payments to the Kentucky unemployment insurance fund established in KRS 341.49; and
 - c. Maintained a Kentucky workers' compensation policy in effect.

The BIDDING AGENCY reserves the right to request documentation supporting a bidder's claim of resident bidder status. Failure to provide such documentation upon request shall result in disqualification of the bidder or contract termination.

Signature Printed Name

Title Date

Company Name _____

Address _____

Subscribed and sworn to before me by _____
(Affiant) (Title)

of _____ this ____ day of _____, 20____.
(Company Name)

Notary Public

[seal of notary]

My commission expires: _____

**REQUIRED AFFIDAVIT FOR BIDDERS, OFFERORS AND
CONTRACTORS CLAIMING
QUALIFIED BIDDER STATUS**

FOR BIDS AND CONTRACTS IN GENERAL:

I. The bidder or offeror swears and affirms under penalty of perjury that the entity bidding, and all subcontractors therein, meets the requirements to be considered a “qualified bidder” in accordance with [200 KAR 5:410\(3\)](#); and will continue to comply with such requirements for the duration of any contract awarded. Please identify below the particular “qualified bidder” status claimed by the bidding entity.

_____ A nonprofit corporation that furthers the purposes of KRS Chapter 163

_____ Per KRS 45A.465(3), a "Qualified nonprofit agency for individuals with severe disabilities" means an organization that:

- (a) Is organized and operated in the interest of individuals with severe disabilities; and
- (b) Complies with any applicable occupational health and safety law of the United States and the Commonwealth; and
- (c) In the manufacture or provision of products or services listed or purchased under KRS 45A.470, during the fiscal year employs individuals with severe disabilities for not less than seventy-five percent (75%) of the man hours of direct labor required for the manufacture or provision of the products or services; and
- (d) Is registered and in good standing as a nonprofit organization with the Secretary of State.

The BIDDING AGENCY reserves the right to request documentation supporting a bidder’s claim of qualified bidder status. Failure to provide such documentation upon request may result in disqualification of the bidder or contract termination.

Signature

Printed Name

Title

Date

Company Name _____

Address _____

Solicitation/Contract #: Taxpayer Location Service

- _____ Must provide proof of general liability insurance in the minimum amount of \$1,000,000.00 with Jessamine County Fiscal Court named as additional insurer
- _____ Must have worker's compensation insurance coverage for all employees that perform work under the contract prior to execution of contract
- _____ Must have a Jessamine County Occupational License and be in compliance
- _____ Must adhere to all local, state and federal regulations

Jessamine County Taxpayer Location Services Specifications

Scope of Program and General Requirements:

The Jessamine County Fiscal Court is seeking proposals from qualified companies, vendors and agencies for Taxpayer Location Services.

The Jessamine County Occupational Tax Office is responsible for the administration of the Jessamine County License Fee Ordinance including the registration of persons or business entities conducting business in Jessamine County and the collection of occupational and net profit license fees.

Jessamine County is seeking Taxpayer Location Services to conduct investigations to ensure all entities conducting business within the County are properly registered, reporting and paying occupational and net profit license fees as required. More information on these fees can be found at www.jessamineco.com.

Evaluations:

The County intends to evaluate bids based on the written response to the bid request and to make a tentative selection of a successful offeror with whom the County will then engage in negotiations to finalize a contract. The County reserves the right to reject any or all bids.

Bid Content and Requirements:

Bids should be submitted under company letterhead addressed to the Jessamine County Fiscal Court, 101 North Main Street, Nicholasville, KY 40356 and include the vendor name, address and telephone number; name, title, address and telephone number of the contact person during the period of bid evaluation; and signature of a person authorized to bind vendor to this bid.

Scope of Work:

Responder shall:

Establish a comprehensive inventory of the entities subject to taxation by the County and database elements needed to facilitate a comprehensive comparative analysis with the County's records of those entities that are properly registered;

Compare respondent's database of business records with the County's records to identify potential non-reporting and non-registered entities subject to taxation;

For each unregistered or non-reporting entity identified and confirmed, assist the entities, as necessary, to complete the County's applicable registration form(s) and determine the amount of tax due for current and prior periods (plus applicable interest and penalties, where appropriate);

Invoice entities (including supporting documentation) on behalf of the County for amount of identified deficiencies;

Ensure that all submitted registration forms are completed correctly and in their entirety;

Collect the amount of identified deficiencies, together with supporting documentation, and remit payment received to the County monthly;

Establish a call center open during normal business hours to assist entities with questions concerning application of the County's taxes and reporting and remittance requirements;

Educate entities regarding the County's reporting requirements to prevent recurring deficiencies in future years;

Monitor and analyze the business license registration files of the County each quarter during the term of the contract in order to determine non-reporting businesses.

Responder must demonstrate the ability to:

- Effectively conduct tax investigations

- Maintain confidential information

- Develop and execute effective tax investigation strategies

Additional Information:

Describe your firm's experience in providing similar tax investigation services for other clients, including tax amounts identified for clients.

How many years have you provided these services?

Describe any unique characteristics of your company that will identify your competitive advantage over other companies?

Please provide a minimum of three references. Provide an overview of the services in use and contact information for each client; company/city name, address, contact person, phone and email address.

Is there any pending legal action against your company? If yes, please describe.

Please provide any other information you believe will be useful in our decision.