

November 16, 2000

01-038

PROPOSAL AWARD – 1098-T FORM PREPARATION AND MAILING SERVICES

PREPARED BY: Sandy Wanner, Buyer/Contract Specialist

FINANCIAL RESPONSIBILITY: Wing-Kit Chung, Associate Vice-President, Finance

APPROVED BY: Randy McEwen, Vice-President, Administrative Services
Dan Moriarty, President

REPORT: The Federal Taxpayer Relief Act of 1997 mandated that each College prepare and mail 1098-T forms to all registered students annually. These forms list eligible fees that can be submitted by students for tax relief based on the Hope Scholarship and Lifetime Learning tax credit programs.

A Request for Proposals (RFP) was issued seeking a vendor to provide the preparation and mailing of approximately 60,000 1098-T forms annually. This RFP is for a one (1) year contract period with possible renewals, not to exceed three (3) years total term. The RFP was advertised in the Daily Journal of Commerce and posted on the State of Oregon VIP system on October 11, 2000. RFP documents were distributed to eight (8) vendors. The award is to be based on a possible score of 100 points for: meeting all service requirements, cost, performance and references, and presentation and responsiveness of their proposal. The following three (3) vendors submitted proposals by the due date of October 30, 2000:

<u>Contractor</u>	<u>Points</u>
NCS Pearson	86
Moore Business Communication Services	96
Workflow Direct	72

Note: None of the vendors are certified M/W/ESB firms.

RECOMMENDATION:

That the Board of Directors award the 1098-T Form Preparation and Mailing Services contract to Moore Business Communication Services, for the not-to-exceed total amount of \$24,855.00. The estimated three (3) year cost will not exceed \$75,000.00.

The contract will be for a one (1) year period with possible renewals, not to exceed three (3) years total. Funding will be from the General Fund.

Director Anderson moved to approve Resolutions 01-032 through 01-038 by consent agenda; it passed unanimously.