

June 24, 2004

04-171

ACCEPT PROPOSAL/AWARD CONTRACT FOR 1098-T  
FORM PREPARATION, MAILING AND TRANSMISSION

BY: Sandy Wanner, Buyer/Contract Specialist

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

APPROVED BY: Randy McEwen, Vice President, Administrative Services  
Dr. Preston Pulliams, District 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 advertised and issued on April 5, 2004. The RFP was advertised in the Daily Journal of Commerce, on the State of Oregon VIP, and on the College's Purchasing Website.

Eight (8) RFP documents were downloaded from the College's Purchasing Website. The award is to be based on a maximum possible score of 300 points collectively using the following listed criteria: Meets all service requirements, Cost, Performance and References, and Proposal package and responsiveness. The following two (2) vendors submitted proposals by the due date of April 27, 2004:

<u>Contractors:</u>	<u>Points:</u>
Moore Wallace BCS	278
Education Computer Systems, Inc.	247

Note: Neither vendor is a certified M/W/ESB firm. There are no State-certified MWESB contractors that perform this work.

RECOMMENDATION:

That the Board of Directors award the 1098-T Form Preparation, Mailing, and Transmission contract to Moore Wallace BCS, for the not-to-exceed total amount of \$25,000.00. 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.

Resolutions 04-158 through 04-177 were moved for approval by Director Germond and it passed unanimously.