

REQUEST FOR PROPOSAL

**RFP 85-03-26-13
SPECIAL TAX ADMINISTRATION SERVICES**

FOR

**FREMONT UNIFIED
SCHOOL DISTRICT
4210 TECHNOLOGY DRIVE
FREMONT, CA 94538**

**Proposals Due
March 26, 2013 at 2:00 PM**

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NOTICE TO PROPOSERS
RFP 85-03-26-13
SPECIAL TAX ADMINISTRATION SERVICES

NOTICE IS HEREBY GIVEN THAT THE FREMONT UNIFIED SCHOOL DISTRICT will accept sealed proposals for SPECIAL TAX ADMINISTRATION SERVICES. The District requests that the information be received by the District on or before Tuesday, March 26, 2013 at 2:00 PM.

The Request for Proposal (RFP) is located on the District's website at www.fremont.k12.ca.us/purchasing where all instructions can be found. Any questions regarding this notice should be directed to Bryan Wakefield at bwakefield@fremont.k12.ca.us.

GOVERNING BOARD
Fremont Unified School District
Alameda County, California
Bryan Wakefield, Purchasing Director

Dates Published: March 12, 2013
 March 19, 2013

Publications: The Argus

INSTRUCTIONS TO PROPOSERS

Proposals shall be made in accordance with the following instructions:

1. Deadline for Receipt of Proposals: **Three (3) copies of the proposals plus one (1) copy on CD** shall be filed with the **Purchasing Department** at 4210 Technology Drive, Fremont CA 94538, on or before **Tuesday March 26, 2013** at 2:00 PM. Proposals and copy on CD shall be submitted in a sealed envelope or package.
2. Requests for Information: Any questions relative to the request regarding documents, discrepancies, omissions or doubt as to meanings should be directed to the Director of Purchasing, Bryan Wakefield at bwakefield@fremont.k12.ca.us. All written questions will be answered in writing, and will be made available on the District's website at www.fremont.k12.ca.us/purchasing.
3. Forms: Proposals shall be made in the format specified by the District. All items should be addressed. Numbers should be stated in figures, and the signatures of all individuals must be in longhand. The submission should be made without interlineations, alterations, or erasures.
4. Non-Collusion Declaration: Each Proposer must return a fully executed Non-Collusion Declaration, as required by Public Contract Code section 7106, with the completed proposal. The Non-Collusion Declaration is included in this package.
5. Addenda or Bulletins: Any addenda or bulletins issued prior to the RFP due date shall form a part of the specifications of the RFP. If addenda are issued for this RFP, they will be posted on the District's website at www.fremont.k12.ca.us/purchasing and the form for recognizing any addenda is part of this package. If there are no addenda or bulletins issued prior to the RFP due date, this form will not be required to be included in the proposal package.
6. RFP Price Form: Proposer shall return the RFP Price Form with their proposal. The RFP Price Form is included in this package.
7. Cost of Preparation: All costs for preparation of proposals shall be borne by the Proposer.
8. Retention of Information: The District reserves the right to retain all proposals. The District will not be responsible or liable in any way for any losses that the Proposer may suffer from the disclosure of information or materials to third parties.
9. Withdrawal of Proposals: Any Proposer may withdraw their proposal either personally by written request, telephone conversation or email request confirmed at any time prior to the scheduled closing time for the receipt of proposals.

10. Rejection of Proposals: The District reserves the right to accept or reject any and all proposals. The District reserves all its rights and options including:
- To reject any and all proposals that fail to meet the requirements of this RFP;
 - To accept proposal(s) that are, in the judgment of the District, in the best interest of the District;
 - To request clarification from any Proposer;
 - To reject any and all non-responsive proposals;
 - To waive irregularities in any proposal that the District may elect to waive;
 - To reject all proposals without cause;
 - To issue subsequent requests for new proposals; or
 - To discontinue discussions after commencing discussions with a Proposer, and commence discussions with other Proposer(s).
11. Award of Contract: The Governing Board reserves the right to reject any or all proposals, or to waive any irregularities or informalities in any proposals. The award of the contract, if made by the District, will be to the Proposer that is, in the judgment of the District, is in the best interest of the District.
12. Duration of Contract: The District is requesting to contract with a special tax administration services company for the remainder of the special tax period for the District. The District has three (3) years remaining for the special tax collection period. The District intends to contract with the successful Proposer on an annual basis, unless prior written notice is submitted by the District.
13. Termination for Convenience: The District will have the right to terminate the agreement at any time for convenience that is without cause, with thirty (30) days written notice to the other party. Under this circumstance, once notified in writing, both parties will work together to settle the existing account.
14. Statement of Confidentiality: Responses to this RFP becomes the exclusive property of the District upon receipt. All proposals received in response to this RFP become a matter of public record and shall be regarded as public records. A Proposer may designate elements in its proposal which are defined as business or trade secrets and plainly marked as “Confidential,” “Trade Secret,” or “Proprietary.”

Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, the District may not be in a position to establish that the information that a Proposer submits is a trade secret. If a request is made for information marked “Confidential,” “Trade Secret,” or “Proprietary,” the District will provide the Proposer who submitted the information with reasonable notice to allow the Proposer to seek protection from disclosure by a court of competent jurisdiction.

SPECIFICATIONS

RFP Contents:

Section 1	Introduction and Purpose of RFP
Section 2	Schedule of Events
Section 3	Scope of Services
Section 4	RFP Response Format
Section 5	Proposal Evaluations

SECTION 1 INTRODUCTION AND PURPOSE OF REQUEST FOR PROPOSAL (RFP)

Introduction

Fremont Unified School District is a K-12 school district with approximately 33,000 students. The District's 44 campuses are all located within the City of Fremont. Additional information about the District is available at www.fremont.k12.ca.us.

Elementary Schools: 28

Junior High Schools: 5

Comprehensive High Schools: 5

Continuation High Schools: 1

Charter Schools: 1

Adult School and ROPs: 2

District offices, Operations and Grounds, and Transportation: 3

On November 2, 2010, the voters of Fremont approved local funding measure, Measure K. An annual tax of \$53 per parcel will generate approximately \$3.2 million annually for five years. Measure K includes a requirement that the District establish a Senior Exemption process that would allow senior citizens to request an exemption from the tax. The District provides an official form for senior citizens to complete to request exemption from the tax on an annual basis. Upon annual application to the District, an exemption of any tax assessment year may be granted to any owner aged 65 years and over of a parcel used solely for owner-occupied, single-family residential purposes. The District's Senior Exemption waiver form is translated into Chinese and Spanish and is posted on the District website and is made available at the District Office, school site offices and the Fremont Main Library. This form is also included in this RFP.

Purpose

It is the District's intent of this Request for Proposal (RFP) to enter into a contract with a single company to provide special tax administration services for the District for the remainder of Measure K.

SECTION 2 SCHEDULE OF EVENTS

Date	Action
March 12, 2013	First Advertisement
March 19, 2013	Second Advertisement
March 20, 2013, 4:00 PM	End Written Question Period
March 22, 2013, 4:00 PM	Deadline for Addressing Written Questions and issuing Addenda. Answers and any addenda will be posted on the District’s website at www.fremont.k12.ca.us/purchasing
March 26, 2013, 2:00 PM	RFP Submitted to District
April 10, 2013	Contract award
April 11, 2013	Start of contract

SECTION 3 SCOPE OF SERVICES

The Fremont Unified School District is requesting special tax administration services. Data changes will be obtained and incorporated into our database. Levies will be calculated and submitted beginning fiscal year 2013/2014, exceptions resolved and cleared, and a final comprehensive report will be prepared for the Fremont Unified School District’s (“District”) reference following each year’s levy. It is the District’s intent to contract with a company that will provide a full “turnkey” solution to the District for special tax administration services.

Specific steps in the annual levy process include the following:

1. Maintain and periodically update an electronic database containing parcel-basis data and annual special tax levy amounts by Assessor’s Parcel Number. For the purpose of completing this task, the Proposer will obtain, as required, Assessor’s parcel maps, Assessor information, building permits, and any other data required to calculate and apportion the special tax.
2. Annually calculate and apportion the special taxes, as specific in the Method of Apportionment of the Special Tax.
3. To address the allowable exemption for property owners over age 65, Proposer will, accordingly, process applications for annual senior exemptions and update the database.
4. Review senior exemptions to verify continued eligibility.
5. Prepare annual resolution(s), if need be, for approval of the special tax and application to the County tax roll.
6. Provide special tax levies for each parcel by Assessor’s Parcel Number, formatted in the required configuration and media, to the Alameda County Auditor/Controller for placement on the annual property tax roll.
7. Research and, if possible, resubmit installment amounts that are unapplied by the County Auditor/Controller’s Office.

8. Provide a toll-free number to field inquiries from District staff, property owners and other interested parties regarding special tax installments and information related to special tax.

SECTION 4 RFP RESPONSE FORMAT

The proposal shall include the following elements:

Part I – Cover Letter

The cover letter shall include a brief statement of intent for the services offered to the District, and signature of an authorized officer of the organization

Part II – Table of Contents

The table of contents shall identify the contents of the proposal in a format consistent with the format set forth herein.

Part III – Background and Experience

The description shall show that the Proposer possesses demonstrated skills and experiences in specific areas of the RFP. This section shall include:

1. Background of company
2. Describe the company's experience providing these types of services
3. A list of all public school districts which the Proposer has provided special tax administration services over the past three (3) years

Part IV – Scope of Services

Successful Proposer will address all items listed in the Scope of Services listed in Section 3.

Part V – Non-Collusion Declaration

Each Bidder must return a fully executed Non-Collusion Declaration, as required by Public Contract Code section 7106, with the completed proposal. The Non-Collusion Declaration is included in this package.

Part VI – Addenda Form

Any addenda or bulletins issued prior to the proposal due date shall form a part of the proposal specifications. All addenda will be posted on the District's website at www.fremont.k12.ca.us/purchasing and the form for recognizing any addenda is part of this package.

Part VII - RFP Price Form

Proposer shall complete and return an RFP Price Form with their proposal.

SECTION 5 PROPOSAL EVALUATIONS

This RFP is designed to develop the best business solution to meet the needs of the District. Proposals will be reviewed for content, completeness, experience, qualifications, means of providing the service and price. District will select the proposal that provides the best match for the District.

In determining the responsibility of a Proposer, the following criteria will be considered:

- The ability, capacity and skill of the Proposer to perform the contract or provide the services required;
- Whether the Proposer can perform the contract or provide the service promptly, or within the time specified, without delay or interference;

- The character, integrity, reliability, reputation, judgment, experience and efficiency of the Proposer;
- The quality of performance on previous contracts or services’
- The previous and existing compliance by the Proposer with laws and ordinances relating to the contract or service;

By responding to this RFP, Proposer acknowledges that acceptable Proposers may be subject to an interview by a District Committee who shall make their recommendation to the District’s Board of Trustees for the award of the special tax administration services contract.

By responding to this RFP, Proposer acknowledges that this agreement is for the performance of a service and shall be determined upon finding the best match for the purposes of the District and that lowest responsible proposer requirements do not apply.

NON-COLLUSION DECLARATION

State of California)

) ss.

County Of Alameda)

I, _____, being duly sworn, declare that I am
_____ of _____ the party making the

foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Bidder has not directly or indirectly induced or solicited any other Bidder to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any other Bidder or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Bidder or any other Bidder, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Bidder, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Bidder has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this _____ day of _____ 2013 at _____ California.

Signature

ADDENDA

The undersigned acknowledges receipt of the following Addenda and the cost, if any, of such revisions has been included in the Lump Sum Grand Total of your bid.

Addenda Number _____ Dated _____

Addenda Number _____ Dated _____

Addenda Number _____ Dated _____

Name of Bidder _____

RFP PRICE FORM

RFP 85-03-26-13 SPECIAL TAX ADMINISTRATION SERVICES
March 26, 2012, 2:00 PM

TO: FREMONT UNIFIED SCHOOL DISTRICT, acting by and through its Governing Board, herein called the District.

Pursuant to and in compliance with your Notice to Proposers calling for Proposals and the other documents relating thereto, the undersigned Proposer, having familiarized themselves with the terms, of the contract, hereby proposes and agrees to perform the contract and to provide and furnish all labor, materials, equipment and transportation necessary to perform the contract in connection with:

RFP 85-03-26-13 SPECIAL TAX ADMINISTRATION SERVICES

all in strict conformity with RFP contract documents including addenda number(s) _____ on file at the Purchasing Department of the District.

Total for Special tax administration services
(*Not to exceed amount*)

Year 1 \$ _____
Year 2 \$ _____
Year 3 \$ _____
Total (3 year period) \$ _____

Proposer is (check one):

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Individual | <input type="checkbox"/> Individual Doing Business under a Firm Name |
| <input type="checkbox"/> Partnership | <input type="checkbox"/> Corporation |

INDIVIDUAL NAME

FIRM/CORPORATION NAME

PARTNER(S) NAME(S)

RFP PRICE FORM

NO PROPOSAL IS VALID UNLESS SIGNED BY THE AUTHORIZED PERSON MAKING THE PROPOSAL. If the party is an individual, the proposal shall be signed by the individual; if the party is a partnership, the name of the partnership shall be given and the proposal signed by one of the partners; if the party is a corporation, the proposal shall be signed by the corporation's properly authorized officer.

I, _____, the _____ of the
Name Title

_____ hereby certify under penalty of perjury under the
Firm Name

laws of the State of California that all the information submitted herewith in connection with this proposal and all the representations herein made are true and correct.

Executed this _____ day of _____, 2013 at _____, California.

Authorized Signature: _____

Printed Name: _____

Title: _____

Business Address: _____

Phone: _____

Fax: _____

Email: _____



Request for Exemption from the Measure K Parcel Tax – Fiscal Year 2013-2014

(Request for Exemption must be completed annually)

FOR OWNER-OCCUPANTS AGE 65 AS OF JUNE 30, 2013

FREMONT UNIFIED SCHOOL DISTRICT

4210 TECHNOLOGY DRIVE ~ FREMONT, CA 94538

PHONE: 510-979-7709 FAX 510-659-2597

Name _____

Street Address _____ City _____ Zip Code _____

Telephone _____ Birth Date _____

Under penalty of perjury, I declare that (1) I own and maintain as my primary residence, the property listed at the address above and identified on the property tax bill submitted with this form, (2) I will be 65 years of age or older on June 30, 2013, and (3) all documentation submitted with this Request for Exemption from the Parcel Tax is, to the best of my knowledge, correct and complete.

Signature of Applicant or Designee Date

Please attach the following documentation (3 separate documents) in support of your Request for Exemption from the Measure K Parcel Tax:

1. An entire copy of your 2012-2013 property tax statement;
2. proof of residence; and
3. proof of birth date.

Property

- Property Tax Statement (2012-2013) - copy of entire statement

Residence Verification

(one from below)

- Social Security check with mailing address intact
- Utility bill with mailing address intact

Birth Date Verification

(one from below)

- Valid Driver's License/CA ID with birth date intact
- Birth Certificate
- Passport
- Medicare Card

The District will maintain the privacy and confidentiality of all information submitted on and accompanying this form in accordance with California Civil Code sections 1798 et seq.

Send, fax or deliver this form and the 3 required supporting documents by May 31, 2013 to:

**Measure K Parcel Tax Exemption
Fremont Unified School District
4210 Technology Drive, Room 217
Fremont, CA 94538
Attn: Sharon Coco**

FAX # (510) 659-2597



Solicitud para la Exención de la Medida K para el Impuesto de Parcela

Año Fiscal 2013-2014

(La solicitud para la Exención se debe llenar anualmente)

PARA LOS PROPIETARIOS OCUPANTES DE 65 AÑOS DE EDAD AL 30 DE JUNIO DE 2013

DISTRITO ESCOLAR UNIFICADO DE FREMONT

4210 TECHNOLOGY DRIVE ~ FREMONT, CA 94538

TELÉFONO: (510) 797-7709 FAX: (510) 659-2597

Nombre _____

Dirección _____ Ciudad _____ Código Postal _____

Teléfono _____ Fecha de Nacimiento _____

Bajo pena de decir verdad, declaro que (1) soy propietario y mantengo como mi residencia principal la propiedad que se menciona a continuación y que se identifica en el recibo del predial que se presenta con este formulario, (2) que tendré 65 años de edad (o mayor) para el 30 de junio de 2013, y (3) toda la documentación que se presenta con esta Solicitud para la Exención del Impuesto de Parcela es, según mi leal saber y entender, correcta y completa.

Firma del Solicitante o Designado

Fecha

Anexe la siguiente documentación (3 documentos por separado) para apoyar su Solicitud para la Exención de la Medida K para el Impuesto de Parcela:

- 1. una copia completa de su estado de cuenta del predial 2012-2013,**
- 2. comprobante de residencia y**
- 3. comprobante de su fecha de nacimiento**

Propiedad

- Estado de Cuenta del Predial (2012-2013) – copia del estado de cuenta completo

Comprobante de Residencia (uno de los siguientes)

- Tarjeta del seguro social con la dirección intacta
 Recibo de luz, agua, gas, etc., con la dirección intacta

Comprobante de Fecha de Nacimiento (uno de los siguientes)

- Licencia o ID Vigente
 Acta de Nacimiento
 Pasaporte
 Tarjeta del Medicare

El Distrito mantendrá la privacidad y confidencialidad de toda la información que se presente y que se acompañe con este formulario, de conformidad con el Código Civil de California secciones 1798 et seq.

Envíe por correo, por fax o entregue este formulario y los 3 documentos de apoyo a más tardar el 31 de mayo de 2013 a:

**Exención de la Medida K para el Impuesto de Parcela
 Distrito Escolar Unificado de Fremont
 4210 Technology Drive
 Fremont, CA 94538**

Attn: Sharon Coco

FAX: (510) 659-2597



K號議案土地稅豁免申請書-2013-2014財政年度(每年必須重新申請豁免)

適用於2013年6月30日年滿65歲的屋主

FREMONT UNIFIED SCHOOL DISTRICT

4210 TECHNOLOGY DRIVE ~ FREMONT, CA 94538

電話：(510) 979-7709 傳真：510-659-2597

姓名 _____

地址 _____ 城市 _____ 郵遞區號 _____

電話 _____ 生日 _____

我在此聲明(1) 我擁有以上和此表格一同附上的房產稅單上相同地址的房產，並在內居住，(2) 我將在2013年6月30日年滿65歲，以及(3)所有和此土地稅豁免申請附上的文件，都完全屬實。若有不實，願受偽證罪制裁。

申請人或指派人簽名 _____

日期 _____

請附上以下K號議案減免土地稅申請的輔助文件(需三份不同的文件)：

1. 一份2012-2013年房產稅單的完整副本，
2. 居住證明，和
3. 生日證明。

房產

整個2012-2013房產稅單的副本

居住證明

(下列選一)

上有地址的社安支票

上有地址的水電帳單

生日證明

(下列選一)

有效的駕照/加州居民證

出生證明

護照

健保卡

學區將遵守加州民事法第1798條規定，將對所有提出的資料和附帶文件保密。

將此表格和三份確認文件在2013年5月31日之前送達：

Measure K Parcel Tax Exemption

Fremont Unified School District

4210 Technology Drive, Room 217

Fremont, CA94538

Attn: Sharon Coco

傳真: (510) 659-2597