



General Services Agency

Aki K. Nakao, Director

October 24, 2000

COUNTY OF ALAMEDA
REQUEST FOR INTEREST
For
SALES TAX AUDITING AND CONSULTING SERVICES

INTENT:

It is the intent of this request for interest (RFI) to assist in the development of a list of qualified contractors that are willing to provide the County of Alameda -County Administrator's Office (CAO) with tax auditing and consulting services to recover lost tax revenue.

It is the intent of the CAO to issue a Request for Proposal (RFP) through the General Services Agency's Purchasing Department on approximately August 15, 2000 for a Sales Tax Auditing and Consulting Services contract to begin approximately October 1, 2000.

SCOPE:

The CAO provides professional and pro-active leadership to the Board of Supervisors (BOS), department heads, and the public through fiscal and administrative policy development and program oversight. The CAO requires a consultant to provide sales tax auditing services and reports on major sales tax producers by rank and category, including trend, growth, decline, and aberrations analysis both by category and by district. The selected vendor will also provide reports of historical growth comparisons with the State, County, and Consumer Price indices (CPI), as well as top producer listings, composition, and analysis regarding the volatility of the county's economic base. This vendor will also be responsible for reporting registration changes and dollars allocated by business name and number.

The selected vendor will perform audits to identify and correct "point-of-sale" distribution errors, including contacting businesses where a probability of errors exists, and preparation and submission of information to the California State Board of Equalization to correct any allocation errors identified.

The vendor will work with and advise County business license staff to enhance business license collection efforts; provide sales tax projections on specific projects for redevelopment negotiation and budget purposes; and generate other reports and/or programs to enhance the sales tax base through improved economic development efforts.

CONTRACTOR QUALIFICATION CRITERIA:

- A. Contractor minimum qualification criteria includes, but is not limited to, the following:
1. Experience within the past 5 years working with California County governments, the California State Board of Equalization, and the California State Controller's Office for tax revenue enhancement purposes.
 2. The knowledge and ability to track business development within the County of Alameda.
 3. The ability to provide accurate quarterly reports and provide in-depth analysis regarding trends for the next six to twenty four months.

- B. The General Services Agency is interested in promoting the growth of small local businesses, by increasing the participation of these businesses in the County’s purchases of goods and/or services.

In order to encourage businesses to locate and remain in the County, to provide and enhance employment opportunities for persons living in the County, and to contribute to the economic environment of the County, the General Services Agency will incorporate the following requirements into the RFP to be issued.

Bidders not meeting the following definitions of small and local business, are required to either partner, joint venture or subcontract with a small and local business for at least twenty (20) percent of the total estimated bid amount in order to be considered for the contract award.

For the purpose of the contract referenced herein, a small and local business is one having no more than \$5,000,000 in average gross receipts annually over the last three (3) years, and is a firm or dealer with fixed offices or distribution points located in and having a street address within the County, and which holds a valid business license issued by the County or by a City within the County.

In order to meet the partnering, joint venture or subcontracting requirements of this section, businesses which are not small and local, must submit with their bids, written documentation evidencing a firm contractual commitment to meeting the twenty (20) percent local participation goal described above, in the event the contract is awarded to them.

The General Services Agency reserves the right to waive the small and local business participation requirement for this contract if the additional estimated cost to the County which may result from inclusion of the requirement exceeds five (5) percent of the total estimated contract amount or \$10,000, whichever is less.

COUNTY CONTACTS:

Questions regarding this RFI must be submitted by 12:00 noon on Friday, August 28, 2000, in writing to:

John Butchart-Buyer
 Alameda County GA – Purchasing
 1401 Lakeside Drive, Suite 907
 Oakland, CA 94612
 FAX: (510) 208-9626
Jbutchar@co.alameda.ca.us

ESTIMATE CALENDAR OF EVENTS:

Event	Date
Request for Interest (RFI) Issued	August 15, 2000
Written Questions Due	August 25, 2000
RFI Response Due	<i>BEFORE</i> 2:00 p.m. on August 29, 2000
Request for Proposal (RFP) Issued	August 31, 2000
Contract Start Date	November 1, 2000

Note: Dates referenced are approximate.

REQUEST FOR INTEREST RESPONSE FORMAT:

Alameda County GSA-Purchasing intends to issue a Request for Proposal (RFP) in order to establish a contract for the above-referenced service in the near future.

Vendors who meet the Qualification Criteria and are interested in receiving a Request for Proposal, should it be issued, must complete the attached Vendor Application and return it **preferably via e-mail** to purchbid@co.alameda.ca.us before **2:00 p.m. on August 29, 2000**. The subject of the e-mail must read: **RFI – Audit Services**. On-line Vendor Applications are available on the Alameda County Web Site at <http://www.co.alameda.ca.us> ([General Services Agency, Purchasing, Vendor Application](#)). See below for alternatives to submitting via e-mail. RFI responses received after the due date and time above are not guaranteed to be included on the RFP bid list referenced herein.

To be included on the bid list in order to receive an RFP, vendors are required to:

1. Complete the following Vendor Application. All areas above “Purchasing Department Use Only” must be completed. If utilizing the on-line Vendor Application, “#10 RFI-Sales Tax Auditing and Consulting Services” must be typed where requested to **List the Supplies and/or Services Vendor is Interested in Providing**.
2. E-mail, fax, or post U.S. Mail the Vendor Application by the due date and time referenced above. Responses received after the due date and time are not guaranteed to be included on the RFP bid list referenced in this RFI.

E-Mail: purchbid@co.alameda.ca.us
Subject: RFI – Audit Services

Mail: John Butchart, Buyer
Alameda County, GSA-Purchasing
1401 Lakeside Drive, Suite 907
Oakland, CA 94612

Envelopes must be clearly marked: **RFI - Audit Services**

Fax: Attn: John Butchart, Buyer
Subject: RFI – Audit Services
(510) 208-9626

Alameda County does not guarantee that a Request for Proposal for the services described herein will in fact be issued. Any dates referenced in this RFI document are approximate.

VENDOR APPLICATION

Mail or FAX to: ALAMEDA COUNTY GENERAL SERVICES AGENCY, PURCHASING DEPARTMENT
1401 Lakeside Drive, Suite 907, Oakland, California 94612
FAX NUMBER: (510) 208-9626

E-MAIL: purchbid@co.alameda.ca.us

- Request:**
- Add new vendor
 - Add new doing-business-as (DBA) name for existing vendor
 - Add new address for existing vendor
 - Change: Name DBA Address for existing vendor **(Check one)**
 - Other

Vendor Information:

Full Legal Business Name: _____

DBA Name: _____

Federal Tax ID Number (required): _____

PO Box/Street Address: _____

City: _____ State: _____ ZIP: _____

Vendor Contact's Name: _____

Contact's Telephone: _____ FAX _____ Toll-Free _____

Vendor Contact's E-mail address: _____

Please check all that apply:

- LOC Local Vendor (Has street address and business license within Alameda County)
- SML Small Business (as defined by Small Business Administration)
- WOM Woman Owned Business (greater than 50%)
- AFA African American Ownership (greater than 50%)
- ASN Asian Ownership (greater than 50%)
- HIS Hispanic Ownership (greater than 50%)
- NAM Native American Ownership (greater than 50%)
- BUR Does NOT do business in Burma

List the Supplies and/or Services Vendor is Interested in Providing:

#10 RFI – SALES TAX AUDITING AND CONSULTING SERVICES

Completed by: _____ Title: _____ Date: _____

Purchasing Department Use Only

Acknowledged by: _____ on _____ (date)

The GSA Purchasing Department added/modified the vendor record according to the information provided above. **The assigned vendor number is:** _____

The GSA Purchasing Department could not add or modify the vendor record for the following reason(s): _____

- Please resubmit this form with the requested information.