



**University of South Carolina**  
 Purchasing Department  
 1600 Hampton Street, 6th floor  
 Columbia, SC 29208  
 Telephone: (803) 777-4115

**Request for Quotation**  
**Page One**

**THIS IS NOT AN ORDER**

Quotation must be received No Later Than: <b>9:00 AM</b> 8   7   2014	Send quotation to above address Attention of: <b>Dennis Gallman</b>	Quotation Number: <b>USC-RFQ-2663-DG</b>	Date 7   28   2014
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Print company name and address:

Please quote your lowest delivered price of the items(s) listed below. The Purchasing Department reserves the right to reject any or all quotes and to waive any or all technicalities.

1. If an item cannot be furnished, indicate by **NO QUOTE**.
2. All quotes must be signed by the vendor's representative and terms noted, failure to comply with this instruction may result in disqualification of the quote.
3. **FAXED QUOTES ACCEPTABLE.** FAX # (803) 777-2032

Federal I.D. or Social Security No. \_\_\_\_\_ SC Minority Certification Number (If Applicable) \_\_\_\_\_

Submitted By (Print Name) \_\_\_\_\_ Signature \_\_\_\_\_ Telephone \_\_\_\_\_

Item No.	Quantity and Unit	Description of Commodity or Services	Unit Price	Total Price
1	1.0 Lot	Provide Custom Tax Rate Solution/Service  SEE SCOPE OF WORK /SPECIFICATION AND BID SCHEDULE.  gallmand@mailbox.sc.edu  Vendor e-mail address: _____  A e-mail or faxed quote is acceptable. Quotes may be faxed to (803) 777-2032.		

## SCOPE OF WORK / SPECIFICATIONS

### BACKGROUND:

The University of South Carolina has many locations in our state and it is difficult to determine, monitor and maintain use tax rates for each location, which municipality should be reported and the type of local use tax or taxes. In South Carolina our use tax is identical to sales tax with the exception that sales tax is collected by a supplier, whereas use tax is self-assessed by the purchaser. Further the State of South Carolina Department of Revenue (SC DOR) requires reporting of self-assessed use tax by municipality. Municipalities in South Carolina are not bounded by zip codes nor zip + 4 codes, but instead rely on each municipality boundary. Here is an excerpt from SC DOR on this topic:

*“WHEN A ZIP CODE IS DIVIDED ACROSS COUNTY OR MUNICIPAL LINES AND ONE COUNTY OR MUNICIPALITY HAS A LOCAL TAX AND ANOTHER DOES NOT, VENDORS SHOULD CONTACT THE CUSTOMER TO INQUIRE ABOUT THE COUNTY OR MUNICIPAL LOCATION.”*

*Source: SC DOR ST-439*

For SC DOR, a municipality can be a city, town or county (if outside city or town limits); but we are required to report local taxes to the proper municipality. Here is an excerpt from SC DOR on this topic:

*“\*If your sales or purchases are delivered within a city or town, you must use the CITY or TOWN code to properly identify the specific city.”*

*Source: SC DOR ST-389*

Additionally, each municipality can have none, one or even many local use taxes. Some of these local taxes include:

1. CP: Capital Project Tax: 34-2726
2. SD: School District: 34-730
3. ECI: Education Capital Improvement Tax: 34-730
4. TT: Transportation Tax: 34-2728
5. LO: Local Option Tax: 34-2721
6. TD: Tourism Development Tax: 34-2740
7. NL: No Local Tax

### SCOPE AND REQUIREMENTS:

The University of South Carolina has a good understanding of taxability of property and services for the State of South Carolina and is not seeking assistance or service in distinguishing what property and/or services are taxed, exempted or at a reduced rate.

The University of South Carolina is only looking for a use tax solution and/or service for Payment / Accounts Payable (AP) payments and is not looking for a sales tax solution nor Billing / Accounts Receivable (AR).

The solution and/or service will be used in setting up our new Oracle PeopleSoft 9.2 AP solution in order to collect and report tax data to SC DOR via forms ST-3 and ST-389, specifically in location setup for ship-to, in identifying the municipality, local tax types and their corresponding rate.

The University of South Carolina is not directly seeking a solution that will directly interface with Oracle PeopleSoft 9.2 AP; however would consider such a solution if it is cost effective. Instead, our plan is that an employee will manually key and update data between Oracle Peoplesoft 9.2 AP and this requested solution and/or service.

The University of South Carolina is not directly seeking a solution that will produce a SC DOR form nor electronically submit our SC DOR use tax data; however would consider such as solution if it is cost effective. Instead our plan is to continue manual entry of our SC DOR forms.

The University of South Carolina is not seeking a solution to manage exemptions, certificates nor refunds.

The University of South Carolina is not seeking a solution for accommodations, excise nor gasoline taxes.

The University of South Carolina is requiring a solution and/or service (for all tax jurisdictions in South Carolina) that will:

- Given street addresses of various University of South Carolina locations, will provide and ability to view:
  - Municipality
  - Applicable Local Tax Type(s)
  - Rate for each Local Tax Type
- Ability to provide a list or notification when a University location has or will have a change in:
  - Municipality
  - Applicable Local Tax Type(s)
  - Rate for each Local Tax Type
- Process to add or remove University locations as needed and have use tax data for that location available by next business day.

Informational Links:

- South Carolina Department of Revenue, Sales and Use Tax  
<http://www.sctax.org/Tax+Information/Sales+and+Use+Tax/default>
- SC DOR Combined form ST-3 and ST-389  
[http://www.sctax.org/NR/rdonlyres/023413BC-D600-4508-A0DC-093AAF463E92/0/ST3\\_ST389\\_fillable05122014.pdf](http://www.sctax.org/NR/rdonlyres/023413BC-D600-4508-A0DC-093AAF463E92/0/ST3_ST389_fillable05122014.pdf)

## GENERAL CONDITIONS

**DEFAULT:** In case of default by the Contractor, the University of South Carolina reserves the right to purchase any or all items in default in the open market, charging the Contractor with any additional costs. The defaulting Contractor shall not be considered a responsible bidder until the assessed charge has been satisfied.

All amendments to and interpretation of this RFQ shall be in writing. The procurement officer shall not be legally bound by any amendment or interpretation that is not in writing.

**SC/US PREFERENCE:** In order to receive the South Carolina/United States made, manufactured or grown end-product preference, you must check the appropriate space (s) provided on the face of the quotation form. This preference does not apply to services.

Any contract entered into by the University of South Carolina or its agencies resulting from this quotation shall be subject to cancellation at the end of any fiscal or appropriated year unless otherwise provided by law.

Payment will be made in accordance with Section 11-35-45 of the South Carolina Consolidated Procurement Code and Disbursement Regulations. Delay in receiving invoices, as well as errors and omissions on the invoices, will be considered just cause for withholding payment without losing discount privileges. The University reserves the right to withhold payment or make such deductions as may be necessary to protect the University from loss or damage because of defective work, claims, damages or to pay for repair or correction of materials furnished hereunder.

Quoted prices must remain firm for a period of thirty days beyond the Request for Quotation deadline. Unit prices will govern over extended prices unless otherwise stated.

The University of South Carolina shall consider payment discounts in the award of this contract when such discounts are for thirty days or more after final inspection and acceptance of contract requirements. Payment discounts for less than thirty days are encouraged but shall not be a factor in award determination. Please state your discount terms using the above referenced information as the University's position on the matter.

All materials and products offered must be guaranteed to meet and comply with the requirements all the specifications, terms and conditions indicated or referred to.

The award will be made in accordance with Section 11-35-1520 of the South Carolina Consolidated Procurement Code.

The University reserves the right to reject any and all quotations and to cancel the solicitation; waive any and all technicalities; the University reserves the right to reject any quotation in which the delivery time indicated to be of substantial length to cause disruption and/or delay in operation for which the item(s) is/are intended; ambiguous quotations which are uncertain as to terms, delivery, quantity or compliance with specifications may be rejected.

The successful contractor assumes sole responsibility and shall hold harmless the University of South Carolina, its directors, officers, employees and agents from and against any and all claims, actions or liabilities of any nature which may be asserted against them by third parties in connection with the performance of the successful bidder, its directors, officers, employees and agents under this agreement. The University of South Carolina agrees to accept responsibility for claims, actions or liabilities resulting from negligent acts of its employees occurring within the scope of their employment which may be asserted against them by third parties in connection with the performance of the University of South Carolina, its members, directors, officers, employees and agents under this agreement.

Contractor agrees not to refer to award of this contract in commercial advertising in such a manner to state or imply that the products or service provided are endorsed or preferred by the user.

Upon award of a contract under this quotation, the person, partnership, association or corporation to whom the award is made must comply with the laws of South Carolina that require such person or entity to be authorized and/or licensed to do business in this State. Notwithstanding the fact that applicable statutes may be exempt or exclude the successful quoter from requirements that it be authorized and/or licensed to do business in this State, by submission of this signed quote, the quoter agrees to subject itself to the jurisdiction and process of the courts of the State of South Carolina as to all matters and disputes arising or to arise under the contract and the performance thereof, including any questions as to the liability for taxes, licenses or fees levied by the State.

Termination: Subject to the provisions below, the contractor may be terminated for any reason by the University providing a thirty-day advance notice in writing is given to the contractor.

Termination for Convenience: In the event that this contract is terminated or cancelled upon request and for the convenience of the University may negotiate reasonable termination costs, if applicable.

Termination for Cause: Termination by the University for cause, default, or negligence on the part of the Contractor shall be excluded from the foregoing provisions; termination costs, if any, shall not apply. The thirty day advance notice requirement is waived and the default provision in this bid shall apply.

HIPAA Law: The Contractor agrees that to the extent that some or all of the activities within the scope of this Contract are subject to the Health Insurance Portability Accountability Act of 1996, P.L. 104-91, as amended ("HIPAA"), or its implementing regulations, it will comply with the HIPAA requirements and will execute such agreements and practices as the University of South Carolina may require to ensure compliance. Additional information may be viewed at: <http://www.sc.edu/hipaa/>

## **SPECIAL CONDITIONS**

**LICENSES, PERMITS, INSURANCE:** All costs for required licenses, permits and insurance shall be borne by the Bidder.

The University of South Carolina requires all contractual activities to be performed in a manner that is consistent with all applicable federal, state and local laws, regulations, rules, rulings and ordinances. These include, but are not limited to: the Occupational safety and Health Act, The Environmental Protection Act, The South Carolina Hazardous Waste Management Act.

### **IMPORTANT** – Please Note

Vendors, we **MUST** have your Federal ID # (company) or Social Security # (individual) before processing any invoices for payment. Failure to provide this information will result in delay of payments until this information is received. Please include this information with your quote.

## USC-RFQ-2663-DG

TERM OF CONTRACT – EFFECTIVE DATE / INITIAL CONTRACT PERIOD (JAN 2006): The effective date of this contract is the first day of the Maximum Contract Period as specified on the final statement of award. The initial term of this agreement is one year from the effective date. Regardless, this contract expires no later than the last date stated on the final statement of award.

TERM OF CONTRACT – OPTION TO RENEW (JAN 2006): At the end of the initial term, and at the end of each renewal term, this contract shall automatically renew for a period of one year, unless contractor receives notice that the state elects not to renew the contract at least thirty (30) days prior to the date of renewal. Regardless, this contract expires no later than the last date stated on the final statement of award.

## SCOPE OF WORK / SPECIFICATIONS

DELIVERY / PERFORMANCE LOCATION – PURCHASE ORDER: After award, all deliveries shall be made and all services provided to the location specified by the University of South Carolina in its purchase order.

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**BID SCHEDULE**  
**USC-RFQ-2663-DG**

**Year 1**

Item	Qty	Unit of Measure	Description		Price
1	1	Lot	<b>Include full description of any license and usage restrictions (e.g. user, quantifies, etc) Describe in detail product specifications</b>		\$ _____

Item	Qty	Unit of Measure	Description		Price
2	1	Lot	<b>Describe annual maintenance or subscription fees</b>		\$ _____

Item	Qty	Unit of Measure	Description		Price
3	1	Lot	<b>Describe in detail other cost</b>		\$ _____

**Resident Contractor Preference** \_\_\_\_\_

**Resident Sub-Contractor Preference (2%)** \_\_\_\_\_ **Number of Sub-Contractors** \_\_\_\_\_

**Resident Sub-Contractor Preference (4%)** \_\_\_\_\_ **Number of Sub-Contractors** \_\_\_\_\_

**Year 2**

<b>Item</b>	<b>Qty</b>	<b>Unit of Measure</b>	<b>Description</b>		<b>Price</b>
<b>1</b>	<b>1</b>	<b>Lot</b>	<b>Same as Year One</b>		<b>\$ _____</b>

<b>Item</b>	<b>Qty</b>	<b>Unit of Measure</b>	<b>Description</b>		<b>Price</b>
<b>2</b>	<b>1</b>	<b>Lot</b>	<b>Same as Year One</b>		<b>\$ _____</b>

<b>Item</b>	<b>Qty</b>	<b>Unit of Measure</b>	<b>Description</b>		<b>Price</b>
<b>3</b>	<b>1</b>	<b>Lot</b>	<b>Same as Year One</b>		<b>\$ _____</b>

**Resident Contractor Preference \_\_\_\_\_**

**Resident Sub-Contractor Preference (2%) \_\_\_\_\_ Number of Sub-Contractors \_\_\_\_\_**

**Resident Sub-Contractor Preference (4%) \_\_\_\_\_ Number of Sub-Contractors \_\_\_\_\_**

**Year 3**

<b>Item</b>	<b>Qty</b>	<b>Unit of Measure</b>	<b>Description</b>		<b>Price</b>
1	1	Lot	Same as Year One		\$ _____

<b>Item</b>	<b>Qty</b>	<b>Unit of Measure</b>	<b>Description</b>		<b>Price</b>
2	1	Lot	Same as Year One		\$ _____

<b>Item</b>	<b>Qty</b>	<b>Unit of Measure</b>	<b>Description</b>		<b>Price</b>
3	1	Lot	Same as Year One		\$ _____

Resident Contractor Preference \_\_\_\_\_

Resident Sub-Contractor Preference (2%) \_\_\_\_\_ Number of Sub-Contractors \_\_\_\_\_

Resident Sub-Contractor Preference (4%) \_\_\_\_\_ Number of Sub-Contractors \_\_\_\_\_

Preference (4%) \_\_\_\_\_ Number of Sub-Contractors \_\_\_\_\_

**(Total Years 1 thru 3) \$ \_\_\_\_\_**

**Note:** The service preferences do not apply to a bid for an item of work by the bidder if the annual price of the bidder's work exceeds \$50,000 or the total potential price of the bidder's work exceeds \$500,000. [11-35-1524(E)(3)]

Please refer to the preference clauses listed in the additional conditions of this solicitation to ensure that you qualify to select the above preferences.

Bidder is to submit the following for preferences requested above:

- 1) Identify the subcontractor to perform the work:
- 2) Identify the work the subcontractor is to perform:
- 3) Bidder's factual basis for concluding that the subcontractor's work constitutes the required percentage of the work to be performed in the procurement.

#### **ADDITIONAL CONDITIONS**

**PREFERENCES - A NOTICE TO VENDORS (SEP. 2009):** On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at [www.procurement.sc.gov/preferences](http://www.procurement.sc.gov/preferences). ***ALL THE PREFERENCES MUST BE CLAIMED AND ARE APPLIED BY LINE ITEM, REGARDLESS OF WHETHER AWARD IS MADE BY ITEM OR LOT. VENDORS ARE CAUTIONED TO CAREFULLY REVIEW THE STATUTE BEFORE CLAIMING ANY PREFERENCES. THE REQUIREMENTS TO QUALIFY HAVE CHANGED. IF YOU REQUEST A PREFERENCE, YOU ARE CERTIFYING THAT YOUR OFFER QUALIFIES FOR THE PREFERENCE YOU'VE CLAIMED. IMPROPERLY REQUESTING A PREFERENCE CAN HAVE SERIOUS CONSEQUENCES.*** [11-35-1524(E)(4)&(6)]

**PREFERENCES - RESIDENT CONTRACTOR PREFERENCE (SEP 2009):** To qualify for the RCP, you must maintain an office in this state. An office is a nonmobile place for the regular transaction of business or performance of a particular service which has been operated as such by the bidder for at least one year before the bid opening and during that year the place has been staffed for at least fifty weeks by at least two employees for at least thirty five hours a week each. In addition, you must, at the time you submit your bid, directly employ, or have a documented commitment with, individuals domiciled in South Carolina that will perform services expressly required by the solicitation and your total direct labor cost for those individuals to provide those services must exceed fifty percent of your total bid price. [11-35-1524(C)(1)(iii)] Upon request by the procurement officer, you must identify the persons domiciled in South Carolina that will perform the services involved in the procurement upon which you rely in qualifying for the preference, the services those individuals are to perform, and documentation of the your labor cost for each person identified. If requested, your failure to provide this information promptly will be grounds to deny the preference (and, potentially, for other enforcement action).

PREFERENCES - RESIDENT SUBCONTRACTOR PREFERENCE (SEP 2009): To qualify for this preference, You must meet the following requirements. (1) You must -- at the time you submit your bid -- have a documented commitment from a single proposed first tier subcontractor to perform some portion of the services expressly required by the solicitation. (2) The subcontractor -- at the time you submit your bid -- must directly employ, or have a documented commitment with, individuals domiciled in South Carolina that will perform services expressly required by the solicitation and the total direct labor cost to the subcontractor for those individuals to provide those services exceeds, as applicable, either twenty percent for a 2% preference or forty percent of bidder's total bid price for a 4% preference. (3) You must identify the subcontractor that will perform the work, the work the subcontractor is to perform, and your factual basis for concluding that the subcontractor's work constitutes the required percentage of the work to be performed in the procurement. [11-35-1524(D)] You can stack this preference, i.e., earn another 2% or 4% preference for each additional qualifying subcontractor, but the preference is capped.

[11-35-1524(D)(4), (E)(7)] Upon request by the procurement officer, you must identify the persons domiciled in South Carolina that are to perform the services involved in the procurement upon which you rely in qualifying for the preference, the services those individuals are to perform, the employer of those persons, your relationship with the employer, and documentation of the subcontractor's labor cost for each person identified. If requested, your failure to provide this information promptly will be grounds to deny the preference (and, potentially, for other enforcement action). YOU WILL NOT RECEIVE THE PREFERENCE UNLESS YOU SPECIFY WHETHER YOU ARE CLAIMING THE 2% OR 4% PREFERENCE AND YOU PROVIDE THE INFORMATION REQUIRED BY ITEM (3) ABOVE.

SUBCONTRACTOR SUBSTITUTION PROHIBITED - RESIDENT SUBCONTRACTOR PREFERENCE (SEP 2009): If you receive an award as a result of the subcontractor preference, you may not substitute any business for the subcontractor upon which you relied to qualify for the preference, unless first approved in writing by the procurement officer. If you violate this provision, the State may terminate your contract for cause and you may be debarred. In addition, the procurement officer may require you to pay the State an amount equal to twice the difference between the price paid by the State and the price offered by the next lowest bidder, unless the substituted subcontractor qualifies for the preference. [11-35-1524(D)(5)(c)]

MINORITY PARTICIPATION (JAN 2006)

Is the bidder a South Carolina Certified Minority Business?  Yes  NO

Is the bidder a Minority Business certified by another governmental entity?  Yes  NO

If so, please list the certifying governmental entity: \_\_\_\_\_

Will any of the work under this contract be performed by a SC certified Minority Business as a subcontractor?  Yes  NO

If so, what percentage of the total value of the contract will be performed by a SC certified Minority Business as a subcontractor?  Yes  NO

Will any of the work under this contract be performed by a minority business certified by another governmental entity as a subcontractor?  Yes  NO

If so, what percentage of the total value of the contract will be performed by a minority business certified by another governmental entity as a subcontractor?  Yes  NO

If a certified Minority Business is participating in this contract, please indicate all categories for which the Business is certified:

- Traditional minority
- Traditional minority, but female
- Women (Caucasian females)
- Hispanic minorities
- DOT referral (Traditional minority)
- DOT referral (Caucasian female)
- Temporary certification
- SBA 8 (a) certification referral
- Other minorities (Native American, Asian, etc.)

(If more than one minority contractor will be utilized in the performance of this contract, please provide the information above for each minority business.)