INVITATION FOR BID #1314149

DOCUMENT IMAGING AND IMAGE RETRIEVAL SOLUTION

ACCEPTANCE DATE: Prior to 2:00 p.m., June 16, 2016 “Local time”

ACCEPTANCE PLACE
Boone County Fiscal Court
2950 Washington Street
PO Box 960
Office of the Assistant County Administrator
2nd Floor Administration Building
Burlington, Kentucky 41005

Requests for information related to this Invitation should be directed to:

Mark Spicer
E-mail address: mspicer@boonecountyky.org

Issue Date: June 2, 2016

IF YOU NEED ANY REASONABLE ACCOMMODATION FOR ANY TYPE OF DISABILITY IN ORDER TO PARTICIPATE IN THIS PROCUREMENT, PLEASE CONTACT OUR OFFICE AS SOON AS POSSIBLE.

The Boone County Fiscal Court will receive sealed bids in the Office of the Assistant County Administrator, Second Floor, Administration Building, 2950 Washington Street,
Burlington, Kentucky  41005, until 2:00 p.m., June 16, 2016 for Document Imaging and Image Retrieval Solution.  Bids will be opened and publicly read aloud at that time in the Fiscal Courtroom, First Floor, Administration Building. Late, electronically submitted or facsimile bids will not be accepted.

BID ENVELOPE MUST BE LABELED: "SEALED BID:  Document Imaging and Image Retrieval Solution"

Specifications may be obtained in the Finance Department, 2950 Washington St, 2nd Floor Room 205, Burlington, KY  41005.

Boone County reserves the right to reject any and all bids, to waive any informalities and to negotiate for the modifications of any bid or to accept that bid which is deemed the most desirable and advantageous from the standpoint of customer value and service and concept of operations, even though such bid may not, on its face, appear to be the lowest and best price.  No bid may be withdrawn for a period of thirty (30) days after scheduled time of receipt of bids.

INTENT

Whenever a specific “Brand Name” is used in these specifications, it is used for descriptive purposes only. Whenever or where the Bidder takes exceptions to the Specifications, such exceptions shall be listed on the “Exception Sheet”, of these specifications, and signed by the Bidder.  The Bidder must use the attached “Bid Form as No Other Form”, will be accepted. The Bidder shall also attach to the Bid Form, descriptive information and literature showing the items on which the Bid was based. The Boone County Assistant County Administrator shall be the sole judge of whether a Bid meets the intent of these specifications.

KENTUCKY PREFERENCE LAW

The scoring of bids/bids is subject to Reciprocal preference for Kentucky resident bidders and Preferences for a Qualified Bidder or the Department of Corrections, Division of Prison Industries. *Vendors not claiming resident bidder or qualified bidder status need not submit the corresponding affidavit.
2.0 GENERAL INSTRUCTIONS

It is necessary for vendors to read instructions contained herein, to understand exactly how to submit a bid, what must accompany the bid, and what the vendor obligates himself for by submitting the bid. Failure to carefully read and understand the instruction and bid specifications may either cause the bid not to be considered or accepted by the Boone County Fiscal Court hereinafter referred to as BCFC, or cause the vendor to obligate himself to more than he realizes.

HOLD HARMLESS

Any offeror submitting a bid agrees that the decisions of the BCFC are final and shall hold harmless BCFC, its directors, employees, consultants, and other involved in the design, and selection of the system, and the successful vendor(s) of this bid. The submission of a bid indicates acceptance of these conditions.

2.1 PREPARATION OF BIDS

2.1.1 All information requested of the vendor shall be entered in the appropriate space on the attached forms. Failure to do so may disqualify the bid.

2.1.2 All information shall be entered in ink or typewritten. Mistakes may be crossed out and correction inserted before submission of your bid. Correction shall be initialed in ink by the person signing the bid.

2.1.3 The Terms and Signature Sheet shall be signed by an authorized officer or employee of the bidder.

2.1.4 Bids must be submitted by the date and at or prior to the time specified to be considered. No late bids, telegraphic, facsimile, or telephone bids will be accepted.

2.1.5 Correction and/or modifications received after the closing time specified will not be accepted.

2.1.6 Completed bids shall be submitted no later than 2:00 p.m. (local time), June 16, 2016. Bids received after this time will be rejected. Bids will be opened and publicly read aloud at that time in the Fiscal Courtroom, First Floor, Administration Building located at 2950 Washington Street, Burlington, Kentucky.

2.1.7 The vendor shall respond to this NTB with one (1) original printed copy of the Notice to Bid with a signature from the bidder and two (2) copies of the Notice to Bid marking each submission as such. The copy may be of the Xerographic type.

2.1.8 The envelope containing the bid must be plainly marked "Document Imaging and Image Retrieval Solution" with the following information to wit:

(1) Name of Project and Sealed Bid: i.e. Document Imaging and Image Retrieval Solution
(2) Name of Bidder
(3) Bidder's Address
2.1.9 BCFC may, in response to formal or informal questions from vendors amend this document by means of an addendum. Each addendum shall be numbered and the addendum shall be held as an integral part of the original document.

2.1.10 The vendor shall acknowledge receipt of all documents and addendum in his response, and bids shall be firm for ninety (90) days after bid opening.

2.1.11 The BCFC contracts with other public service entities providing services throughout Boone County. The bidder shall agree to extend pricing contained in this NTB to the other Boone County departments. The BCFC assumes no liability or obligation for any action or inaction on the part of any parties that the bidder agrees to extend the bid contract to thereof.

2.1.12 Bidders shall submit a detailed item-by-item response to each numbered item of this NTB. If no specific response is required to an item, indicate understanding and compliance by entering "Comply" alongside the item number in the detailed response. For those items requiring responses indicate page and paragraph where the response can be found. For those items that do not apply indicate "NA". This detailed response to each numbered item shall be separate section in the bid and identified as "Item by Item Responses". Omission of this section may be basis for rejection of the bid.

2.1.13 Time of delivery shall be stated as the number of calendar days following receipt of the order by the vendor to receipt of the goods or services by BCFC.

2.1.14 Time of delivery will be a consideration in the award.

2.1.15 Deviations and Exceptions
If the bidder takes any exceptions to the specifications or deviates from the requirement, then bidder shall fully state such deviations or exceptions and the reasons for doing so. In addition, a complete explanation of the results of such changes shall be included as a part of the quotation on a special page entitled: "Exception Sheet" and attached to the Bid Response Form. Failure to submit an “Exception Sheet” page may result in bid rejection.

2.1.16 Anti-Discrimination
By submitting their bid or bids, Bidders or Offerors certify to BCFC that they will conform to the provisions of the Federal Civil Rights Act of 1964, the Americans with Disabilities Act, of 1990 as amended where applicable.

2.2 SPECIFICATIONS-INSTRUCTIONS

2.2.1 These specifications are not intentionally written around any one manufacturer and are for the purpose of indicating general size, type, and description of the equipment needed.

2.2.2 Any responsible bidder who considers these specifications to be of a non-competitive nature should immediately contact the Boone County Assistant County Administrator.

2.2.3 BCFC reserves the right to approve as an equal, or to reject as not being equal, any item the bidder proposes to furnish which contains minor variations from specification requirements but may comply substantially therewith. Items exceeding specifications will be considered as meeting specifications.
2.2.4 The bidder shall abide by and comply with the true intent of the specifications and not take advantage of any unintentional error or omission, but shall fully complete every part as the true intent and meaning of the specification.

2.2.5 Changes to the bid specifications are not valid unless authorized in writing by the Boone County Fiscal Court.

2.2.6 Should the vendor observe any discrepancy, ambiguity, omission, or be in doubt as to the intention and meaning of any portion of the specifications, he should report such to BCFC.

2.3 PRICING INSTRUCTIONS

2.3.1 Prices will be considered as Net if no cash discount is shown.

2.3.2 The BCFC is a tax-exempt organization. Certificates will be furnished upon request. The BCFC requests that all required forms by the bidder to be included with the bid packet.

2.3.3 A price breakdown by item shall be supplied. Unit prices by each shall also be submitted on the supplied pricing form. Quantities shown in the specifications are estimates and are made in good faith on the part of the BCFC.

2.3.4 All item pricings shall be final and must include all shipping and handling charges and other fees to be delivered to BCFC.

2.4 CRITERIA OF AWARD

2.4.1 The Unit Pricing Bid Form, must be completely answered in order for the bidder to be considered for award. Bidders are encouraged to submit additional information which they feel might be useful to BCFC in evaluating bids, however, BCFC reserves the right to reject or accept for consideration, during evaluation of bids, any additional information the bidder submits and may reject or accept minor variations when evaluating bids. Bids will be evaluated by but not limited to:

- Bid Completeness
- Bid Cost
- Compliance with Specifications
- Lead Time
- Recommendation(s) by References
- Terms of Warranty

2.4.2 BCFC reserves the right: (1) to award bids received on the basis of individual items, or groups of items or on the entire list of items; (2) reject any or all bids, or any part thereof; (3) to waive any informality in the bids, and: (4) to accept the bid that is in the best interest of BCFC. BCFC’s decision shall be final.
3.0 PROJECT OVERVIEW

BCFC is currently using Alchemy as our document imaging and retrieval solution. Departments have the ability to scan, and all images are captured as fully OCR’d PDF files. The image retrieval process is antiquated and makes finding documents difficult and time consuming.

We are looking for a solution to maintain our records management database while minimizing document processing and the amount of supplies used per record.

Project Objectives
The solution needs to address the following areas:

- Integrate our records into a single searchable database
  - Database must be capable of purging records in compliance with state retention policies
  - Database must be able to print custom forms with the appropriate fields redacted.
  - Database must be searchable based on user-defined fields
- Importing new records both digital and physical with the capture of necessary fields for search capability.
  - Digital records arrive in a network folder and should be imported with specified data capture ranges for search capability and dissemination.
- Incorporate the current “Alchemy” database and all records contained
  - Make imported records searchable

3.1 SPECIFICATIONS (Please remember that when a brand name is mentioned it is only for descriptive purposes)

The requirement for the document imaging and retrieval solution is to streamline record processing, and increase efficiency. Bidders must complete the attached Vendor Profile and provide three (3) references of prior records management implementations.

The offeror shall include on the appropriate bid tables separately, prices for the product, pricing for implementation or a combination.

3.2 FUNCTIONAL REQUIREMENTS

3.2.1 ACCESS

Client User Interface
- Users can easily navigate and perform their primary job tasks with little-to-no training and with intuitive ribbon-style toolbars, tabs, and easy access features that are based on the familiar look and feel of Microsoft Office products.
- Client provides capabilities for users to personalize their user experience (e.g., personalized home page that opens to personal workflow lifecycles, stored favorite retrievals, etc.).
- Client displays all of the associated information about a document right alongside the image itself – displaying index values, notes, related documents, revisions, discussion threads, and document history.
- Client provides ability to display the document being indexed in a preview pane during the uploading / indexing process.
- Client provides the ability to auto-import camera images and media files directly from a connected device.
- Client enables users to play, stop, and pause multimedia files (audio / video) with the native viewer.
- Client enables users to filter and sort document lists by column headings or predefined search filters to narrow result sets.
- Client enables users to view Microsoft Office and Google word processing documents without a local install of the Office application.
- Client enables users to export data, documents, and or links to document out of the system via email, to a file share or a spreadsheet.
- Client enables users to organize documents in nested, parent-child folders with color coded tabs that create and populate themselves as document enter the system or are processed via workflow.

Web Client Interface
- Web Client provides a dashboard component to create and manage personalized interfaces that present end users with access to priority content and tasks (e.g., workflow status report, commonly used document searches).
- Solution offers full support for the Internet Explorer, Safari and Mozilla Firefox browsers on the Windows platform as well as full support for the Mozilla Firefox browser on the Macintosh platform.

Search Experience
- Solution enables users as well as administrators to create their own personalized saved searches.
- Solution provides ability for meaningful document names to appear in a search results list that can contain both static text as well as defined index values, offering a more detailed description of the documents returned.
- Solution allows users to search for multiple document types (i.e. text, COLD, image, PDF, Word, Office, DWG, etc.) in one search with hit-highlights directly on documents and easy page-to-page navigation between hits.

Retrieval
- Solution provides ability to automatically link related documents of similar or different file types to each other (i.e. mainframe-generated text file to a TIFF image).

Integrated Workflow
- Solution’s workflow experience is integrated to provide task buttons and user interaction on a menu right from selected or open documents through standard document retrieval (i.e. user does not need to enter the workflow client). Provide a screen shot depicting this embedded workflow functionality in your viewer.

Mobile Devices
- Solution provides natively built interfaces to standard mobile devices - BlackBerry, iPad, iPhone, Windows Phone, and Android.

Client Deployment
- System offers a ClickOnce or MSI deployable solution for the client interface, minimizing administration overhead and supporting IT policies.
3.2.2 CAPTURE

- Describe the breadth of your solution’s native, individual capture solutions.

- Describe your ability to scan documents and information (central and remote).

- Describe your ability to import documents and information (central or remote).

- Describe your ability to QA documents once electronically captured (central and remote).

- Describe your ability to automatically classify and index documents/images.

- Describe your ability to extract information and index documents (central and remote).

- Describe your ability to define and apply business rules to validate extracted data.

- Describe the user experience during verification.

- Describe your ability to deliver images and data to a destination of choice.

- Describe the system’s ability to capture and index documents from remote users through either a web-based connection or disconnected method.

- Describe the system’s ability to perform quality assurance (QA) / verification of captured image documents. For instance, the solution should provide options to QA image quality and / or index accuracy. It should also provide a simple image re-scan process that automatically replaces the poor images with the newly-scanned images.

- Solution’s capture process allows for page separation and retrieval. This should include the separation of image and PDF file types.

Electronic

- Describe your solution’s capabilities related to electronic capture.

- Describe the solution’s support of sweeping images and other file types from a network directory, providing an indexing interface for viewing those documents while classifying and indexing them.
Application-Specific Integration
- Describe the ability to import content into your repository from directly within an application such as Microsoft Word or Excel.

Workflow
- Describe the ability of your capture solution to integrate with your workflow engine.

COLD
- Solution provides ability to easily and quickly configure the ingestion of print streams.
- Solution provides ability to parse a print stream and index documents in one process. The solution should be able to handle multiple types of print streams. List those supported by your system.

Indexing
- Describe the indexing capabilities available within your solution.
- Describe your capture process’s ability to automatically fill several index values on a document based on a primary index value that triggers the automatic look up of additional index information already contained within the system.
- Describe your solution’s ability to automatically search for sensitive data and intelligently generate redacted zones.

Recognition Technologies
- Describe the system’s ability to natively provide data and text extraction capabilities for scanned image documents, including OCR, ICR, OMR, bar codes, and signature detection, in order to provide hands-off processing of scanned documents directly into the system without involving third-party software applications.

Image Management
- Describe the solution’s ability to control and track the modification of documents through multiple revisions, allowing users to view prior revisions and track document history. The solution should clearly display the number of revisions associated with a specific document. The solution should allow for the addition of comments per revision.
- Solution provides ability to stamp a specific revision of a document as a version, limiting which revisions of a document a certain user can see.
- User can compare revisions of a Microsoft Word document, outlining in exact detail all differences between the two documents.
Interface
  o Solution provides one central GUI for administration and deployment of capture products.

Configuration
  o Describe the out-of-the-box configurable options related to your solution’s scanning interface.

Scalability
  o Describe the features that enable your system to scale for high-volume imaging applications.

Email
  o Users from email clients such as Outlook, Notes and GroupWise can import emails, attachments and more into the ECM system with minimal data entry.

  o The system can automatically capture and classify messages/attachments from a dedicated, corporate email account without any user interaction or manual indexing requirements—supporting Outlook, Notes, GroupWise, O365 and Gmail.

4.0 CONCLUSION

BCFC has developed these specifications in the best interest of Boone County. The decisions of the Boone County Fiscal Court are final.
5. **UNIT PRICING BID FORM**

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**GRAND TOTAL**

6.0 **COST OF IMPLEMENTATION & TRAINING**

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7.0 **DELIVERY**

Delivery will be made within _________________ days of receipt of Purchase Order.
Signature required if Exceptions
Terms and Signature Sheet

In compliance with this Bid and subject to all conditions thereof, the undersigned offers and agrees to furnish any or all items and/or services upon which prices are quoted, at the price quoted as specified.

My signature certifies that the accompanying bid is not the result of or affected by, any act of collusion with another person or company engaged in the same line of business or commerce, or any act of fraud. I hereby certify that I am authorized to sign this bid for the Bidder.

NAME OF BIDDER: ___________________________ DATE: ________________

ADDRESS: __________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

FEDERAL ID #: ______________________________________________________ (Attached W-9)

SIGNATURE: ________________________________________________________

OFFICIAL TITLE: _____________________________________________________

PHONE (____)____________________  FAX (____)____________________
QUALIFICATIONS:  Firms shall have the capability and capacity in all respects to fulfill the contractual requirements to the satisfaction of the County.

Indicate the length of time you have been in business as a company providing the type of service required for this contract.

______ years  ______ months

Provide a minimum of three (3) references which may substantiate past work performance and experience in the type of work required for this contract.

Name, Address, Phone Number and Contact Person

1. _________________________________________________________________

   __________________________________________________________________

   __________________________________________________________________

   __________________________________________________________________

2. _________________________________________________________________

   __________________________________________________________________

   __________________________________________________________________

   __________________________________________________________________

3. _________________________________________________________________

   __________________________________________________________________

   __________________________________________________________________

   __________________________________________________________________
The scoring of bids/bids is subject to Reciprocal preference for Kentucky resident bidders and Preferences for a Qualified Bidder or the Department of Corrections, Division of Prison Industries. *Vendors not claiming resident bidder or qualified bidder status need not submit the corresponding affidavit.*

**Reciprocal preference for Kentucky resident bidders**

**KRS 45A.490 Definitions for KRS 45A.490 to 45A.494.**

As used in KRS 45A.490 to 45A.494:

1. "Contract" means any agreement of a public agency, including grants and orders, for the purchase or disposal of supplies, services, construction, or any other item; and
2. "Public agency" has the same meaning as in KRS 61.805.

**KRS 45A.492 Legislative declarations.**

The General Assembly declares:

1. A public purpose of the Commonwealth is served by providing preference to Kentucky residents in contracts by public agencies; and
2. Providing preference to Kentucky residents equalizes the competition with other states that provide preference to their residents.

**KRS 45A.494 Reciprocal preference to be given by public agencies to resident bidders -- List of states -- Administrative regulations.**

1. Prior to a contract being awarded to the lowest responsible and responsive bidder on a contract by a public agency, a resident bidder of the Commonwealth shall be given a preference against a nonresident bidder registered in any state that gives or requires a preference to bidders from that state. The preference shall be equal to the preference given or required by the state of the nonresident bidder.
2. A resident bidder is an individual, partnership, association, corporation, or other business entity that, on the date the contract is first advertised or announced as available for bidding:
   a. Is authorized to transact business in the Commonwealth; and
   b. Has for one (1) year prior to and through the date of the advertisement, filed Kentucky corporate income taxes, made payments to the Kentucky unemployment insurance fund established in KRS 341.490, and maintained a Kentucky workers' compensation policy in effect.
3. A nonresident bidder is an individual, partnership, association, corporation, or other business entity that does not meet the requirements of subsection (2) of this section.
4. If a procurement determination results in a tie between a resident bidder and a nonresident bidder, preference shall be given to the resident bidder.
5. This section shall apply to all contracts funded or controlled in whole or in part by a public agency.
6. The Finance and Administration Cabinet shall maintain a list of states that give to or require a preference for their own resident bidders, including details of the preference given to such bidders, to be used by public agencies in determining resident bidder preferences. The cabinet shall also promulgate administrative regulations in accordance with KRS Chapter 13A establishing the procedure by which the preferences required by this section shall be given.
7. The preference for resident bidders shall not be given if the preference conflicts with federal law.
8. Any public agency soliciting or advertising for bids for contracts shall make KRS 45A.490 to 45A.494 part of the solicitation or advertisement for bids.

The reciprocal preference as described in KRS 45A.490-494 above shall be applied in accordance with 200 KAR 5:400.
Determining the residency of a bidder for purposes of applying a reciprocal preference

Any individual, partnership, association, corporation, or other business entity claiming resident bidder status shall submit along with its response the attached Required Affidavit for Bidders, Offerors, and Contractors Claiming Resident Bidder Status. The BIDDING AGENCY reserves the right to request documentation supporting a bidder’s claim of resident bidder status. Failure to provide such documentation upon request shall result in disqualification of the bidder or contract termination.

A nonresident bidder shall submit, along with its response, its certificate of authority to transact business in the Commonwealth as filed with the Commonwealth of Kentucky, Secretary of State. The location of the principal office identified therein shall be deemed the state of residency for that bidder. If the bidder is not required by law to obtain said certificate, the state of residency for that bidder shall be deemed to be that which is identified in its mailing address as provided in its bid.

Preferences for a Qualified Bidder or the Department of Corrections, Division of Prison Industries.

Pursuant to 200 KAR 5:410, and KRS 45A.470, Kentucky Correctional Industries will receive a preference equal to twenty (20) percent of the maximum points awarded to a bidder in a solicitation. In addition, the following “qualified bidders” will receive a preference equal to fifteen (15) percent of the maximum points awarded to a bidder in a solicitation: Kentucky Industries for the Blind, any nonprofit corporation that furthers the purposes of KRS Chapter 163 and any qualified nonprofit agencies for individuals with severe disabilities as defined in KRS 45A.465(3). Other than Kentucky Industries for the Blind, a bidder claiming “qualified bidder” status shall submit along with its response to the solicitation a notarized affidavit which affirms that it meets the requirements to be considered a qualified bidder- affidavit form included. If requested, failure to provide documentation to a public agency proving qualified bidder status may result in disqualification of the bidder or contract termination.
REQUIRED AFFIDAVIT FOR BIDDERS, OFFERORS AND CONTRACTORS CLAIMING RESIDENT BIDDER STATUS

FOR BIDS AND CONTRACTS IN GENERAL:
The bidder or offeror hereby swears and affirms under penalty of perjury that, in accordance with KRS 45A.494(2), the entity bidding is an individual, partnership, association, corporation, or other business entity that, on the date the contract is first advertised or announced as available for bidding:

Is authorized to transact business in the Commonwealth;
Has for one year prior to and through the date of advertisement
Filed Kentucky income taxes;
Made payments to the Kentucky unemployment insurance fund established in KRS 341.49; and
Maintained a Kentucky workers’ compensation policy in effect.

The BIDDING AGENCY reserves the right to request documentation supporting a bidder’s claim of resident bidder status. Failure to provide such documentation upon request shall result in disqualification of the bidder or contract termination.

______________________________  ________________________________
Signature                        Printed Name

______________________________  ________________________________
Title                            Date

Company Name

Address

Subscribed and sworn to before me by

______________________________  ________________________________
(Affiant)                        (Title)

of ______________________________ this _____ day of ____________, 20__.

(Company Name)

Notary Public

[seal of notary]                 My commission expires: ___________
REQUIRED AFFIDAVIT FOR BIDDERS, OFFERORS AND CONTRACTORS CLAIMING QUALIFIED BIDDER STATUS

FOR BIDS AND CONTRACTS IN GENERAL:
I. The bidder or offeror swears and affirms under penalty of perjury that the entity bidding, and all subcontractors therein, meets the requirements to be considered a “qualified bidder” in accordance with 200 KAR 5:410(3); and will continue to comply with such requirements for the duration of any contract awarded. Please identify below the particular “qualified bidder” status claimed by the bidding entity.

_______ A nonprofit corporation that furthers the purposes of KRS Chapter 163

_______ Per KRS 45A.465(3), a "Qualified nonprofit agency for individuals with severe disabilities" means an organization that:
(a) Is organized and operated in the interest of individuals with severe disabilities; and
(b) Complies with any applicable occupational health and safety law of the United States and the Commonwealth; and
(c) In the manufacture or provision of products or services listed or purchased under KRS 45A.470, during the fiscal year employs individuals with severe disabilities for not less than seventy-five percent (75%) of the man hours of direct labor required for the manufacture or provision of the products or services; and
(d) Is registered and in good standing as a nonprofit organization with the Secretary of State.

The BIDDING AGENCY reserves the right to request documentation supporting a bidder’s claim of qualified bidder status. Failure to provide such documentation upon request may result in disqualification of the bidder or contract termination.

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Subscribed and sworn to before me by ________________________________
(Affiant) (Title)

of ________________________________ this _____ day of ________, 20__.
(Company Name)

______________________________
Notary Public

[seal of notary] My commission expires: __________