

Tax Reform Consultant Services

Summary of Response to RFP

Evaluation Criteria:

Directly Related Experience:	<ul style="list-style-type: none">• “No comparable contracts have been completed to date.” proposal, p. 9.
Price:	See attached Official Proposal Price Sheet and Price Comparison Table. <u>Total Max Bid:</u> \$217,550
Plan/Schedule:	<p><u>Plan:</u></p> <ul style="list-style-type: none">• Assessment of the “most pressing issues relating to the primary objectives” of the task force, “namely, job creation, small business concerns, and simplification of the tax code”;• Analysis of pending legislation regarding the federal Patient Protection and Affordable Care Act and federal estate and corporate taxation to determine the impact on the State;• Research to be conducted on each issue, with monthly reports to the task force;• Based on feedback received regarding the December 2017 preliminary report, will conduct further research, analysis and modeling on each topic area for discussion and inclusion in the final September 2018 report.• Executive Summary, p. 8 of proposal. <p><u>Schedule:</u></p> <ul style="list-style-type: none">• No specific time frame for work suggested other than the parameters of the December 2017 preliminary report and the September 2018 final report.
Availability:	<ul style="list-style-type: none">• Offices located in North Little Rock, AR• All staff available to begin work “within 3 working days of the contract award.” proposal, p. 9.
Personnel:	<ul style="list-style-type: none">• Monica Jenious, CEO, serving as Project Director; and• Aundrei Jenious, Vice-President, serving as Lead Researcher.• See full list of personnel with anticipated task assignments and Organizational Chart, pp. 9-10 of proposal.

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Past Performance:	<ul style="list-style-type: none">• Providing tax-related services for 20 years, including tax preparation, tax consultation, small business financial management services, payroll management services, credit counseling services and religious and non-profit financial management services.• See Client List, p. 11 of proposal.• See also information regarding Vendor References, p. 10 and attached References Table.
Compliance with RFP Requirements:	See Attached Checklist
Subcontractors:	None listed. Proposal states at p. 5 and OPPS that the consultant <i>“may need to procure special analysis, studies, whitepapers, etc. as prepared by other consulting or advisory firms. Special analysis will be purchased if it is found that a thorough examination of a tax issue has been completed by an industry expert. Potential sources of analysis include Price Waterhouse Coopers Tax Projects Delivery Group, local accounting firms and practicing CPAs, and the Internal Revenue Service.”</i>