

**CONTRACT DATA SHEET**

PSC Type (check one):  New  Addendum Sole Source:  Yes  No

Contractor Information	
1. Legal Name of Contractor:	<u>World Trade Center INC</u>
2. Address:	<u>101 East Vine Street, Suite 150</u>
3. City, State, & Zip:	<u>Lexington, KY 40507</u>
4. Contact Person Name & Telephone Number:	<u>Ed Webb 574-5053</u>
5. LeAP Supplier #:	<u>1558</u>
6. Revenue Commission Taxpayer ID#:	<u>[REDACTED]</u>
7. Federal Tax ID # (SSN if sole proprietor):	<u>[REDACTED]</u>

Department Information	
8. Requesting Department:	<u>Economic Development</u>
9. Contact Person Name & Telephone:	<u>Matt Yates 574-3730</u>

Contract Information	
10. Not to exceed amount:	<u>\$ 72000</u>
11. Are expenses reimbursed?	<u>No</u>
12. If yes list allowable expenses and maximum amount reimbursable:	<u></u>
13. Beginning and ending date of the contract:	<u>7/1/2014-6/30/2015</u>
14. Coding:	<u>1101 - 505 - 3375 - 337501 - 522998</u>
15. Funding Source	<u>General Fund</u> Federal Funds <input type="checkbox"/> yes <input type="checkbox"/> no
16. Scope & Purpose of the contract:	<u>Professional services with respect to international business and trade. See attached scope.</u>

**Attach all justification documentation to this form, along with signed Written Findings Form.**

Authorizations	
Department Director:	<u>Rebecca J Couch</u> Date: <u>10-24-14</u>
Department certifies:	
<input checked="" type="checkbox"/>	Funds are available
<input checked="" type="checkbox"/>	Contractor is registered and in good standing with the Revenue Commission
<input checked="" type="checkbox"/>	Human Relations Commission registration requirements have been met
<input checked="" type="checkbox"/>	Contractor's status regarding Federal Debarment has been verified per Metro Procurement Policy Section VII - Federally Funded Contracts & Agreements
<u>MS</u>	Purchasing: Approval of Sole Source Designation Date: <u>10/27/14</u>
<u>JR</u>	Risk Management: Certifies Insurance requirements satisfied. Date: <u>11/17/14</u>
<u>JRM</u>	County Attorney: Date: <u>10/30/14</u>
The County Attorney has written the attached Professional Service Contract or Sole Source Contract and has approved that document as to the legality of the instrument itself only and as to its form.	

**WRITTEN FINDINGS**

**EXPLAINING NECESSITY FOR USING NONCOMPETITIVE NEGOTIATION FOR PSC**

This document constitutes written request and findings, as required by KRS 45A.380 stating the need to purchase through noncompetitive negotiation. By the signatures listed below, the Requesting Department has determined, and the Chief Financial Officer concurs, that competition is not feasible because:

\_\_\_\_\_ A. An emergency exists which will cause public harm as a result of the delay in competitive procedures. **\*\* Mayors Approval required for emergency purchases exceeding \$10,000.**

\_\_\_\_\_ B. There is a single source within a reasonable geographic area of the supply or service to be procured or leased (attach sole source determination from the Purchasing Department).

\_\_\_\_\_ C. The contract is for the services typically provided by a licensed professional, such as an attorney, architect, engineer, physician, certified public accountant, registered nurse, or educational specialist; a technician such as a plumber, electrician, carpenter, or mechanic; an artist such as a sculptor, aesthetic painter, or musician; or a non-licensed professional such as a consultant, public relations consultant, advertising consultant, developer, employment department, construction manager, investment advisor, or marketing expert and the like.

\_\_\_\_\_ D. The contract is for the purchase of perishable items purchased on a weekly basis, such as fresh fruits, vegetables, fish, or meat.

\_\_\_\_\_ E. The contract is for replacement parts where the need cannot reasonably be anticipated and stockpiling is not feasible.

\_\_\_\_\_ F. The contract is for proprietary items for resale.

\_\_\_\_\_ G. The contract or purchase is for expenditures made on authorized trips outside the boundaries of the city.

\_\_\_\_\_ H. The contract is for the purchase of supplies which are sold at public auction or by receiving sealed bids.

\_\_\_\_\_ I. The contract is for group life insurance, group health and accident insurance, group professional liability insurance, worker's compensation insurance, or unemployment liability insurance.

\_\_\_\_\_ J. The contract is for a sale of supplies at reduced prices that will afford a purchase at savings to the Metro Government.

\_\_\_\_\_ K. The contract was solicited by competitive sealed bidding and no bids were received from a responsive and responsible bidder.

\_\_\_\_\_ L. Where, after competitive sealed bidding, it is determined in writing that there is only one (1) responsive and responsible bidder.

Rebecca J. Conner 10-24-14  
Requesting Department Director Date

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\*\*Mayor Date  
**\*\*Signature is required only for Written Finding A**

Marian Salmon 10/27/14  
OMB/Purchasing Approval Date

## Neathery, Tracey L

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**From:** Yates, Matt T  
**Sent:** Monday, October 27, 2014 1:08 PM  
**To:** Neathery, Tracey L  
**Subject:** WTC-KY PSC Memo

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**From:** Fleischaker, Rebecca  
**Sent:** Monday, October 27, 2014 11:45 AM  
**To:** Yates, Matt T  
**Subject:** RE: memo

We would like to hire World Trade Center-KY as a PSC because of their expertise in the international business and trade development industry. They are the only organization that represents Kentucky in this endeavor, and we have historically worked with them to achieve alliances between the work the city does in economic development and international development that could result from that work.

Attachment to WTC-KY Contract Data Sheet:

Scope of services

- Partnering with BEAM initiative to support its efforts in Louisville Metro/BEAM partner communities, especially as it relates to the export initiative of BEAM.
- Enhance knowledge and awareness of international trade throughout the Metro Louisville business community.
- Through joint efforts with Louisville Forward, along with its own outreach, work to provide regular trade programming and presentations to all businesses served by Metro Louisville.
- Center will maintain businesses to assess full time trade officer who will work daily with Louisville Metro businesses assess and provide solutions, logistics, compliance, and customs along with other trade matters that are impacting the successful exporting of a client's product or service.
- Through outreach, work to increase the number of companies that benefit from WTC-KY international trade consulting services, education, and training. The WTC-KY will track efforts and provide these updates on a quarterly basis or as needed.
- All Metro Louisville businesses are eligible to receive WTC-KY services at a discounted level.
- WTC-KY proposes providing up to the Economic Development staff with admission to the trade certification program along with free admission to all education programs. In addition, the WTC-KY will provide in-house training to Louisville Forward staff in Guiding Leadership to exporting.
- World Trade Day will be held in Louisville in alternating years. The next year being 2015 (Fiscal Year 2016). Louisville Forward will be asked to play a role in the planning and participating in the program.
- Fully utilizing Louisville Metro Government/WTC-KY partnership, WTC-KY will coordinate joint calls with Louisville Forward personnel. A targeted amount of calls should be discussed and agreed upon.
- In partnership with the Kentucky Cabinet for Economic Development and the Governor's Office, the WTC-KY will continue to conduct Trade Missions to Louisville Metro's top or growing export markets.