

2.3.14

**CLAIMING PURCHASING PREFERENCES**

Each bidder should review the various procurement preferences allowed by State statute. A summary of the preferences can be found on pages 15-18 of the Vendor Handbook located at: <http://www.in.gov/idoa/proc/>

Each bidder must answer the following questions pertaining to purchasing preferences. No preference will be applied unless these questions have been answered and any required attachments included.

1. Are you claiming the Indiana Business Preference (IC 5-22-15-20.5)? Yes  No   
• Indicate under which provision for which you are claiming to qualify as an Indiana business for 1,2, and 3, fully complete the Indiana Economic Impact Form (State Form # 51778, and include it with your bid/proposal. If you are claiming this preference based #4 of #5, please submit the documentation as requested under each category.

- (1) A business whose principal place of business is located in Indiana.
- (2) A business that pays a majority of its payroll (in dollar volume) to residents of Indiana.
- (3) A business that employs Indiana residents as a majority of its employees.
- (4) A business that makes significant capital investments in Indiana.

Any company that can demonstrate a minimum capital investment of \$5 million or more in plant and/or equipment or annual lease payments of \$2.5 million or more shall qualifies as an Indiana business under category #4. If an out of state company does not meet one of these criteria, it can submit documentation/justification to the State for review for inclusion under this category.

(5) A business that has a substantial positive economic impact on Indiana.  
Any company that is in the top 500 companies (adjusted) for one of the following categories: number of employees (DWD), unemployment taxes (DWD), payroll withholding taxes (DOR), or Corporate Income Taxes (DOR); qualifies as an Indiana business under category #5. To verify that your company qualifies you can e-mail [buyindianainvest@idoa.in.gov](mailto:buyindianainvest@idoa.in.gov). Submit the response received for verification purposes.

2. Are you claiming the Indiana Manufactured Preference (IC 5-22-15-20.5)? Yes  No   
• This preference may only be claimed by respondents who claim the Indiana Business Preference.  
• Submit necessary documentation detailing a substantial amount of manufacturing, assembly, or production of the products proposed is in the State of Indiana.

3. Are you claiming the preference for supplies that contain recycled or post-consumer materials (IC 5-22-15-16) (the preference does not apply when the purchase description is limited to a supply that contains recycled materials or post-consumer materials)?  
Yes  No   
If yes, a manufacturer's certification must be submitted for each item or group of items for which the offeror is seeking a preference or the preference may not be considered.

4. Are you claiming the preference for soybean oil based ink (IC 5-22-15-18)? Yes  No

5. Are you claiming the preference for soy diesel/bio diesel (IC 5-22-15-19)? Yes  No

6. Are you claiming the Indiana Small Business Preference (IC 5-22-15-23)? Yes  No

If yes, bidder must indicate which category of small business concern applies:

Wholesale business with annual sales of four million dollars (\$4,000,000) or less during its last fiscal year. "Wholesale business, means a business that derives its principal source of income (over 50% of gross revenues) from sales to retailers, other merchants, or industrial, institutional or commercial users who will use the goods for resale or business use. This definition includes distribution activities.

Service business with average sales of five hundred thousand dollars (\$500,000) or less for the current and preceding three (3) fiscal years and which employs no more than twenty-five (25) persons. "Service business," means a business that derives its principal source of income (over 50% of gross revenues) from the sale of useful artistic, educational, intellectual, literary, or scientific labor from which no necessary tangible commodity is derived.

Retail business or business selling services with annual sales and receipts of five hundred thousand dollars (\$500,000) or less. "Retail business," means a business that derives its principal source of income (over 50% of gross revenues) from the sale of supplies to the ultimate consumer.

Manufacturing business, which employs no more than one hundred (100) persons. "Manufacturing business" means a business that derives its principal source of income (over 50% of gross revenues) from the sale of goods the firm produces at its own facility made from raw, unfinished materials, as distinguished from the final product.

A business in any of the following sectors is not a small business if it employees more than one hundred (100) persons or if its annual sales exceed 5 Million dollars (\$5,000,000):

- (A) Information Technology
- (B) Life Sciences
- (C) Transportation
- (D) Logistics

7. Are you claiming the preference for Indiana farm products (IC 5-22-15-23.5)? Yes  No

8. Are you claiming the preference for foods/beverages that contain high levels of calcium (IC 5-22-15-24)? Yes  No