

Town of Arlington, MA

RFP- 13-42

Request for Proposal

November 5, 2013

Version 9.1

General Conditions, Requirements, and Notice to Proposers

PROPOSAL FOR BILL PRINTING AND MAILING SERVICES

CONTENTS

1. Introduction.....	Page 3
2. Key Dates for RFP Response.....	Page 4
3. Response Requirements.....	Page 5
4. Technical Proposal.....	Page 8
5. Submission Requirements.....	Page 15
6. Comparative Selection Criteria.....	Page 16
7. Price Proposal.....	Page 21

Appendices:

- A. Certificate of Non-Collusion
- B. State Tax Form
- C. Price Response Form

Town of Arlington, MA

Request for Proposal

Introduction

The Treasurer of the Town of Arlington, Massachusetts (the Town), thru the office of the Town Manager, is seeking formal proposals from qualified firms to provide Bill Printing and Mailing Services related to the issuance of tax bills for real estate, personal property, excise and water & sewer. The Town will require the selected firm to provide these services for a period of three (3) years.

Responses are due in the Office of the Town Manager, 730 Massachusetts Avenue, Arlington, MA 02476 on **January 10, 2014 by 11:00A.M.** The notice of intent to award will be issued on February 21, 2014. The Town of Arlington reserves the right to negate all responses and enact a non-award condition. The opening of the responses is not public. The responses must be submitted in a separately sealed envelope, so marked; this envelope shall contain separate envelopes for a pricing response and a technical response. The pricing response will require 1 hard copy and an electronic copy. The technical responses will require 4 hard copies and an electronic copy, preferably CD-Read-Only. No reference to pricing fees in the technical response will be accepted. Failure to comply with this stipulation will cause the response to be removed from consideration.

The RFP has been constructed so that responders must provide their answers directly below the questions asked or where specific pieces or information are required. The Town of Arlington Review Committee will not be searching a vendor's response to the RFP if it is not found in the proper location. It is strongly suggested that marketing or promotional materials be provided in a clearly identified section in the vendors response. Failure to conform to this requirement will result in the vendor's response being viewed as non-responsive.

An interview may be requested with any respondent during the evaluation of the responses. Respondents will be interviewed at Town Hall, Arlington, MA. The Town of Arlington is located in Middlesex County, approximately 7 miles west of Boston, and has a population of approximately 42,839 residents according to the most recent U.S. census. The Town has a representative town meeting form of government, administered by a Town Manager, who is appointed by a Board of Selectmen.

The Town Treasurer is responsible for the day-to-day operations of the Town's postal operations. All postal mailings for all Town departments and the School administration are processed thru the Town Hall mailroom.

Key Dates for the RFP Response

11/12/2013	RFP issued 11/12/13
11/27/2013	Questions relative to the RFP are due 11/27/13 by 4:00PM
12/13/2013	Town of Arlington responses due to all responders 12/13/13
01/10/2014	Responses due to Director of Purchasing by 01/10/14 by 11:00AM
01/27/2014	Interviews may be scheduled from 01/27/14 to 02/07/14
02/21/2014	Notification of Intent to Award or not to Award 02/21/14
04/01/2014	Service date commences: 04/01/14

Proposal Rules

This proposal request is solicited to the general public and contract will be awarded to the selected proposer pursuant to the rules set forth in Chapter 30B of the Massachusetts General Laws, and subject to approval by Town of Arlington, MA.

Certification of Non-Collusion and Tax Attestation Form

All proposers wishing to submit proposals must sign the attached form, which incorporates both an attestation clause regarding a certificate of non-collusion. **The signed form must be submitted with the technical proposal package.**

Corrections

Erasures or other changes in the proposal must be explained or noted over the signature of the consultant.

Conflict of Interest

The proposer agrees that to the extent that such law is applicable to the duties it is to perform hereunder, it will comply with the provisions of the General Laws concerning conflict of interest. The proposer covenants that it presently has no interest and shall not require any interest, direct or indirect, which would conflict in any manner or degree with the performance under the agreement.

No employee of the Town of Arlington, MA and no public official who exercises any function or responsibilities in the review or approval of the undertaking or carrying out of this agreement shall participate in any decision relating to this agreement which affects their personal interest or the interest of any corporation, partnership, or association in which they are directly or indirectly interested or have any financial interest, direct or indirect in this agreement or the proceeds thereof.

Signature

All proposals shall be complete, factual, and signed by an authorized individual of the proposer's company on the appropriate page(s).

Ability and Experience

The Town of Arlington, MA will not award a contract to any proposer who cannot furnish satisfactory evidence of their ability and experience.

The Town of Arlington, MA may make such investigations as it deems necessary to determine the above and a proposer shall furnish information requested in this regard and shall furnish it under oath if required.

Contract for Services

The contract(s) for services may be negotiated by the chosen proposer(s) and the Town of Arlington, MA Waiver

The Town of Arlington, MA reserves the right to reject any and all proposals, or to waive any informality in the proposal process, if deemed in the Town of Arlington, MA best interest.

1.

Sealed proposals for Bill

Printing and Mailing Services will be received in the Town Managers Office, Town Hall Annex, on or before **1/10/14** at which time all proposals will be received. No proposals will be accepted after the time and date specified.
The Proposer must submit their Technical Proposal and Price Proposal in separate sealed envelopes bearing on the outside the name and address of the Proposer, Proposal Number and addressed to the **Town Manager**, Town Managers Office, Town Hall Annex. The Technical Proposal must be properly filled out, signed, sealed and endorsed:
“Bill Printing and Mailing Services –Technical Proposal”
The Price Proposal must be properly filled out, signed, sealed and endorsed:
“Bill Printing and Mailing Services – Price Proposal”
Telephone responses and faxed replies will not be accepted. No responsibility shall be attached to any person or persons for the premature openings of proposals not properly marked.
2. Proposals that are incomplete, not properly endorsed, or signed, or which are otherwise contrary to these instructions may be rejected as non-responsive by the **Town Manager**.
3. The Proposer will be bound by all applicable statutory provisions of law of the Federal Government, Massachusetts and of the Town of Arlington, MA. Certificates of all required insurance’s will be required prior to executing a contract.
4. **All submitted proposals and associated price quotes must be guaranteed to the Town of Arlington, MA for the term of any awarded contract. If a contract is to be awarded as a result of this R.F.P., it will be awarded within thirty (30) days from date of proposal opening.**
5. Purchases made by the Town of Arlington, MA are exempt from the payment of Federal Excise Taxes and State Sales Tax; any such taxes must not be included in the quoted price.
6. The Town of Arlington, MA reserves the right to reject any proposals, or to waive any informality in the proposal process, if deemed in the Town of Arlington, MA best interest.
7. The Proposer will not be permitted to either assign or underlet the contract nor assign either legally or equitably, any monies hereunder, or its claim thereto, without the previous written consent of the **TOWN MANAGER** of the Town of Arlington, MA.
8. **Prices and performance times quoted must be firm. Shipping and handling of any kind must be quoted F.O.B. destination.**
9. **When submitting a proposal, the Proposer shall submit one signed original and three (3) copies each of the technical and price proposals, it shall constitute part of any awarded contract.**
10. Before submitting a proposal, each Proposer must make a careful study of the specifications contained in this Request for Proposal document and fully assure themselves as to the quality, quantity and type of services that the Town of Arlington, MA is seeking to have performed.
11. The proposal for this work must cover all contingencies, including all labor and materials, printing, postage, etc., necessary for the performance of the services required by the Town of Arlington, MA.
12.

If proposers have any

questions to ask about specifications or terms of this Request for Proposal, they must be made 5 business days prior to submission deadline. Questions need to be addressed to,

Town Manager and should be emailed to Director of Purchasing Domenic Lanzillotti, dlanzillotti@town.arlington.ma.us. Answers will be in the form of an addendum. No further consideration will be given after the proposal opening. A proposer may correct, modify or withdraw a proposal by written notice received by the **Town Manager**, prior to the time and date set for receiving of all proposals.

13. The contract agreement will be in the form customarily employed by the Town of Arlington, MA. The specifications as detailed under the section entitled PROPOSAL SPECIFICATIONS will constitute part of the contract.
14. Insurance: Before any work begins, all insurance policies must be in place and remain in effect for the term of the contract. Subcontractors must meet all insurance requirements also. All required insurance shall be written with such companies qualified to do business in Massachusetts and shall be in accordance with the general laws of the State of Massachusetts. The vendor must maintain a policy of leading comprehensive public and commercial general liability and owner's protective liability under which the vendor is named as insured and the Town of Arlington, MA is named as additional insured, and under which the insurer agrees to provide coverage in the minimum amounts set forth below. Workers Compensation coverage must be maintained for all of the vendor's employees as required by Massachusetts general law. The minimum amounts of such General Liability insurance shall be not less than One Million Dollars (\$1,000,000) per occurrence/combined single limit and shall be not less than Two Million Dollars (\$2,000,000) in the aggregate per Town Managers Office, Town Hall Annex. If at any time during the contract the vendor fails to provide insurance as established above, this shall be considered a breach of contract and grounds for the termination of the contract. By accepting the contract, the vendor agrees to indemnify, pay on behalf of, defend and hold harmless the Town of Arlington, MA from and against any and all claims, demands, suits, actions, costs, judgments, whatsoever, including reasonable attorney's fees, which may be imposed upon, incurred by, or asserted against the Town of Arlington, MA by reason of (a) any failure on the part of the vendor to comply with any provision or term required to be performed or complied with by the vendor under this contract, or (b) for the death, injury or property damage suffered by any person on account of or based upon the act, omission, fault, negligence or misconduct of any person whomsoever other than the Town of Arlington, MA. The foregoing indemnity and hold harmless agreement shall include indemnity against all costs, expenses and liabilities incurred in or in connection with any such claim or proceeding brought hereon, and the defense thereof with counsel acceptable to the Town of Arlington, MA or counsel selected by an insurance company which has accepted liability for any such claim. The vendor shall furnish the Town of Arlington, MA with certificates of insurance as proof of the above, before any work/service is to commence.

(TO BE RETURNED WITH THE TECHNICAL PROPOSAL)

Proposal

To the Town of Arlington, MA, herein called the Owner, acting through its **Town Manager**, for the purchase of **Bill Printing and Mailing Services**, as required by **Town Manager** of the Town of Arlington, MA.

Proposers' attention is called to Chapter 30 of the Massachusetts General Laws. In connection with this statute, Proposer is required to submit the following information and any other information deemed necessary by the Proposer. All of the following information regarding the Proposer must be completed:

Please indicate business type by placing an X next to the appropriate category:

Corporation

Partnership

Proprietorship

If a Corporation
Full Legal Name

State of Incorporation

If a Partnership
Full Legal Name

If a Proprietorship
Name of Owner or d/b/a

Principal Place of Business

Place of Business
in Massachusetts

Business Mailing Address

Telephone Number w/
extension:

Licensed to do business
in Massachusetts

Yes? No?

Give full names and titles of all the persons and parties interested in the foregoing proposals. (Note: give first and last names in full; in cases of corporations, give names of President, Treasurer and Manager; and in cases of partnerships give names of the individual partners.)

Name

Title

A foreign corporation is required to submit its' certification of corporation from the State Secretary's Office, as required by Chapter30 of the Massachusetts General Laws.

(TO BE RETURNED WITH THE TECHNICAL PROPOSAL)

Proposal – Bill Printing and Mailing Services

If this proposal shall be accepted by the Town of Arlington, MA, and the undersigned shall fail to contract as aforesaid within ten (10) days after notice of intent to award contract (not including Saturdays, Sundays or Legal Holidays) from the Town of Arlington, MA to him, according to the address given herewith, that the contract is ready for signature, The Town of Arlington, MA Town of Arlington, MA may by option determine that the Proposer has abandoned the contract and thereupon the Town of Arlington, MA has the option to award the contract to another proposer.

I/we certify under the penalties of perjury that to the best of my/our knowledge and belief, I/we have filed all state tax returns and paid all state taxes required under law.

The undersigned certifies under penalties of perjury that this proposal is made in good faith and is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this section the word "person" shall mean any natural person, joint venture, partnership, corporation or other business or legal entity. The undersigned certifies that no official or employee of the Town of Arlington, MA is pecuniarily interested in this proposal or in the contract which the Proposer agrees to execute or in expected profits to arise therein.

The undersigned as Proposer declares that the only parties interested in this proposal as principals are named herein; that the Proposer has carefully examined the specifications therein referred to; and they propose and agree that if this proposal is accepted they will contract with the Owner in accordance with the specifications, to provide all necessary work to be done and also furnish all the materials specified in the manner and time prescribed and according to the requirements as set forth; and that they will take in full payment the sum(s) as offered in this proposal.

Social Security Number or Federal ID Number

Type Name of Person Signing Proposal

Date

Signature

Company Name

Title

Street Address

Proposal for – BILL PRINTING AND MAILING SERVICES

Technical Proposal Specifications

The **Town Manager's Office** of the Town of Arlington, MA is seeking to hire a company to provide Bill Printing and Mailing Services. The successful proposer will be responsible for supplying all related services as required in the specifications outlined below. The successful proposer must supply all labor and materials necessary to properly carryout all of the necessary services.

One contract will be awarded to the one responsive and eligible Proposer who the Town of Arlington, MA determines offers the most advantageous proposal, taking into consideration all evaluation criteria set forth in the R.F.P., as well as price. The contract that is awarded as a result of this Request for Proposal will be effective upon completed execution of a contract signed by both the successful Proposer and the appropriate Town of Arlington, MA officials. The contract will be for a period of three (3) years

The performance and payment obligations of the Town of Arlington, MA for years 2 and 3 of an awarded contract will be subject to appropriation or availability of funds. If the Town of Arlington, MA should not, for any reason, at any time, appropriate or otherwise make available, funds to support continuation of performance in any fiscal year succeeding the first year, the **TOWN MANAGER** will cancel any contract pursuant to this R.F.P. without penalty to the Town of Arlington, MA, upon thirty (30) days written notice to the selected vendor.

Interview

Proposers may be required to appear for an interview, if so requested, with the Bill Printing and Mailing Services Review Committee, before any award is made. The purpose of the interview would be to review the Proposers' background and capabilities to perform the services. Failure to comply with this request may result in the REJECTION of the proposal.

Termination Clause

If at any time the Town of Arlington, MA determines that the services of the Proposer are no longer needed, for any reason; then the Town of Arlington, MA will have the option to terminate the awarded contract upon thirty (30) days' written notice to the selected proposer.

If at any time the selected vendor fails to fulfill or comply with any of the requirements of this awarded proposal, such as shoddy workmanship, improper procedures, supplying sub-standard, improperly trained employees, not adhering to the stated response times, or in any way failing to carryout/perform the necessary duties as stated, etc., the Town of Arlington, MA, at its option, can terminate this contract upon thirty (30) days written notice to the selected vendor.

Invoicing

The proposer will submit invoicing for all work performed upon completion of each individual job. All invoices will be paid Net 30 days.

Required Printing & Mailing Services

The Town of Arlington, MA currently uses Planet Press, as its primary software provider. The Town of Arlington, MA produces a number of original invoices as well as demand notices on this system. These include, but are not limited to, Real Estate/Personal Property tax bills and Water and Sewer bills. With this procurement, the Town of Arlington, MA now seeks to contract with a company capable of converting raw data files into finished invoices that are mail-ready.

In general, the standard mailing for **Real Estate, Personal Property, Excise and Water Sewer Bills** will be composed of:

- 1 # 10 Outbound envelope.
- 1 # 9 Courtesy Reply envelopes.
- 1 8.5" x 11" Invoice, micro perforated at remittance stubs, offset ink printing for both face and back.

Occasionally, extra inserts may need to be inserted. Moreover, informational flyers that require both folding and stuffing could also be needed at certain times during the year.

The Town of Arlington, MA expects the company to perform the following services:

1. Accept a data file transmission of bill/notices run via e-mail or file transfer.
2. Prepare printed samples of bill/notices, and make these samples available via email or file transfer.
3. Samples and/or final print should contain a sequence number for locating one or more individual bills/notices in the printing run (see below).
4. Allow for "final release" of (production printing) bills/notices via email or phone call confirmation.
5. Laser print invoice on 8.5" x 11" sheet of paper micro perforated at remittance stub with OCR-A scan line. (Paper and Ink Quality must conform to standard OCR Specifications.)
6. Allow for pull-back of bills/notices by sequence number. That is the ability to remove bills/notices from mailing based on sequence number.
7. Fold invoice and insert into a #10 outbound envelope.
8. Insert #9 courtesy reply envelope into #10 outbound envelope.
9. If required, print, fold and insert informational flyer into #10 outbound envelope.
10. Prepare mailing for post office.
11. Deliver mailing to post office.

Note: The purpose of requirement 6 above is to facilitate control over bills being released(mailed). Currently the Town of Arlington Treasurer's Office staff can filter out bills, like over dues, demands, and so on, that have been paid before mailing.

Real Estate Tax	15,500	June, September, December, March
Real Estate Tax Demands	750	May
Personal Property Tax	525	June, September, December, March
Personal Property Tax Demands	150	May
Water & Sewer	2,500 13,000	Monthly- Thru June 30, 2014 Quarterly-July 1, 2014
Excise- 1 st Commitment	30,000	January
Excise-Other Commitments	600	Monthly
Exceptions: Excise Service Warrants	Approx 700	Must be either printed and delivered by courier to Treasurer's Office or make warrants available to be printed and distributed by the Treasurer

Qualifications

All companies must possess the following minimum qualifications:

1. Companies must have a minimum of five (5) years experience in providing the required types of services.
2. The company, through its written proposal submission, must demonstrate their understanding of the required services and functions that the company must provide/perform under the contract that will result from this Request for Proposal.
3. The company, through its' written proposal submission must demonstrate its' confidence level, commitment of relevant resources to the Town of Arlington, MA and reliability and experience to supply the proper services.
4. The company, through its' written proposal submission, must demonstrate its' ability to perform all of the required services in-house, no work will be subbed out.
5. The company, through its' written proposal submission, must demonstrate its' ability to meet the required turnaround time of 3 business days from the time the file has been received, verified and authorized by the Town of Arlington submission of data files via electronic transfer . For example, if the company received the approved and verified data file on Monday by 10:00 A.M., then the company must deliver the finished product to the Post Office no later than the close of business on Thursday of that same week.
6. The successful bidder **must** be Full Service Intelligent Mail Barcode Provider.
7. The successful bidder **must** be willing to utilize the Town of Arlington bulk mail Permit.

Technical Capabilities of Proposer

1. Internet and Telecommunication Access –
 - a. Telecommunication and Data access with Responders Staff and Respondent's systems.
 - i. Respondent to provide individual telephone numbers and group telephone numbers for all Respondents employees supporting Town of Arlington
 - ii. Respondent will provide all alternative methods of telecommunication access for its staff and systems.
 - iii. Respondent will detail any data requirements to Town for data access or integration
 - b. Staff changes and deletions
 - i. Identification of all management levels assigned to support the Town of Arlington to include phone number, email id and physical location of all Respondent management personnel, their back-ups and any designated sub-contractors
 1. Operations
 2. Invoices / Analysis
 3. Technology Services
 4. Customer Services
 - ii. Respondent will describe method and schedule of notification changes to Respondents organization
 - c. Customer Service
 - i. Respondent will provide detailed description of their customer service operation and internal procedures
 - ii. Respondent will state their committed response times to customer inquiries
 - iii. Respondent will show their current staffing levels and the impact the Town of Arlington will have on their staffing requirements
 - iv. Designate Single Point of Contact (SPOC) and key customer service management personnel.
 - v. Respondent will provide sequence and method of contacting service department for
 1. Phone
 2. Fax
 3. Email
 4. WEB/Internet
 - d. Operations Process
 - i. Level of Authority required for designated Town of Arlington personnel to initiate request support, changes to service or escalations
 - e. Operations Continuity - Disaster Recovery: Respondent will describe their current and future disaster prevention and recovery plans. Respondent will state their expected restoral time.
 - i. Data and Telecommunications Operation
 1. Main Site (s)
 - a. Servers
 - b. Network Access
 - c. Application and software back-up
 - d. Power
 - e. Data Information back-up

2. Alternate site
 - a. Servers
 - b. Network Access
 - c. Application and software back-up
 - d. Power
 - e. Data Information back-up

Submission Requirements

Proposers must submit one (1) signed original and three (3) copies each signed of the Technical Proposal with all required information included and the Price Proposal. The Technical and Price Proposals must be submitted in separate sealed envelopes bearing on the outside the name and address of the Proposer, addressed to the **TOWN MANAGER** of the Town of Arlington, MA Town of Arlington, MA.

The Technical envelope must be labeled:

“Bill Printing and Mailing Services - Technical Proposal”

The Price envelope must be labeled:

“Bill Printing and Mailing Services – Price Proposal”

There must be NO price information included in the Technical Proposal portion of your submission.

Complete proposal packages must be received by:

01/10/14

Town Manager Town of Arlington, MA

Town Managers Office, Town Hall Annex

All proposers must provide written documentation in their proposal, according to the following requirements, as evidence that they meet the minimum requirements listed under “Qualifications” and further, that their company has the requisite background to perform/provide the particular types of bill printing and mailing services.

Each company desirous of consideration will submit the following:

1. Include a narrative that discusses your company’s qualifications that should be considered by the Town of Arlington, MA in reaching a decision.
2. Include a narrative that discusses the various formats with which your company accepts data.
3. Companies must provide 3 references for municipal clients within the past **three (3)** years. Of the **3** references, **all** must be equal to Arlington in terms of their population and parcel numbers. This is to include the contract names/numbers, names of cities/towns the contracts are/were with, duration of the contract, date of work, scope of the services performed and contact name(s) and telephone numbers. The Town of Arlington, MA will contact, either in person, by telephone and/or written correspondence, these individuals as to past performance. Any negative references received will be grounds for the rejection of a proposal. The Town of Arlington, MA reserves the right to contact any entity that the Proposer has conducted business with or for, either currently or in the past, for the purpose of reviewing past work and services satisfaction history.
4. Submit the name and telephone number of the person who will be the main contact from the proposers company for any awarded contract.
5. R.F.P. must include a listing of all management and staffing that will be assigned and/or utilized for this project, indicating the number of individuals who will oversee the contract operations involved.

Comparative Selection Criteria

Each of the following seventeen questions pertains to requirements listed in this R.F.P. These questions will be applied to all Technical Proposals submitted. Each question will receive one rating of either Highly Advantageous, Advantageous, Not Advantageous or Unacceptable. The rating each question receives will be used to compile a composite rating for each Proposal, to be used in the Selection Process segment of this R.F.P. **If any question receives a rating of “Unacceptable” that proposal will be REJECTED.**

Question #1: Compliance with information requested by this RFP

- Highly Advantageous** Proposal has no omissions of information requested in the RFP.
- Advantageous** Proposal has 1-2 significant omissions.
- Not Advantageous** Proposal has 3-4 significant omissions.
- Unacceptable** Proposal has more than 4 of significant omissions.

Question #2: Exceptions taken to the RFP

- Highly Advantageous** Proposer has taken no exceptions to the RFP.
- Advantageous** Proposer has taken 1-2 exceptions to the RFP.
- Not Advantageous** Proposer has taken 3-4 exceptions to the RFP.
- Unacceptable** Proposer has taken more than 4 exceptions to the RFP.

Question #3: References and Experience

- Highly Advantageous** References are of uniformly high quality.
- Advantageous** References are generally good with certain qualifications.
- Not Advantageous** References have raised serious questions regarding its performance.
- Unacceptable** References are of such low quality as to provide no confidence in its ability to perform.

Question #4 Quality Control Procedures

- Highly Advantageous** Selected vendor will provide electronic notification via web portal the bill count and total dollar amount for the Town of Arlington, MA prior to running job and vendor will provide electronic access via web portal to all bills for approval in the bill run to the Town of Arlington, MA prior to running job.
- Unacceptable** Selected is not able to offer the aforementioned services through web portal.

Question #5 Turnaround Time

Turnaround time represents the amount of time in business days that elapse between the time the file has been verified and authorized by the Town of Arlington, MA and the time the finished product is delivered to the Post Office for delivery.

Highly Advantageous Delivery to Post Office within 24 hours after job approval.

Advantageous Delivery to Post Office within 3 business days.

Unacceptable Delivery to Post Office greater than 3 business days.

Question #6 Must have an integrated billing platform that offers the ability to print and mail as well as online payment and e-billing technology through one company

Highly Advantageous Vendor has this ability

Unacceptable Vendor does not have this ability

Question #7 Bill Replication

Highly Advantageous Company will provide the capability to email a bill to a resident and an on-demand program that allows the Town of Arlington, MA to reprint exact replicas of bills on demand that has no licensing restrictions.

Unacceptable Company does not have this capability.

Question #8 Mailing Multiple Bills to Same Address

Highly Advantageous Company may/should have the capability of combining Water, Sewer and Excise tax bills in the same envelope and send to the same address while utilizing bar code technology for quality assurance on each bill with every file submitted by the Town of Arlington, MA

Unacceptable Company does not have this capability.

Question #9 Mail Reporting

Highly Advantageous Company will provide reports stating all incomplete addresses in the file that could not be certified by the USPS and a list of all address updates satisfying move-up-date requirements and can correct the incomplete addresses prior to mailing as to reduce or eliminate any mail returned.

Unacceptable Company does not have these capabilities.

Question # 10 Must have mail tracking capability

Highly Advantageous Vendor offers web tracking of your bills through every step of the process from receipt of the billing file to when the bills have been mailed by the Post Office

Unacceptable Vendor does not offer this functionality

Question # 11 Must have at least five years of business expertise

Highly Advantageous Vendor has been in business five years or longer

Unacceptable Vendor has been in business less than five years

Question # 12 Must have a disaster recovery site for data center and production facility, giving you full redundancy in the case of a disaster.

Highly Advantageous Vendor has disaster recovery site satisfying requirements

Unacceptable Vendor does not have disaster recovery site satisfying requirements

Question # 13 Vendor security and compliance

Highly Advantageous Vendor has been SSAE 16 Type II audited

Unacceptable Vendor has not been SSAE 16 Type II audited

SELECTION PROCESS

As a result of this R.F.P., the TOWN OF ARLINGTON intends to identify a finalist from the proposals received. The Postal Outsourcing Committee review committee will review all proposals and rate each of the Comparative Selection Criteria questions and assign a composite rating for each proposal. Background checks, requests for additional information and interviews will be performed as needed.

The Bill Printing and Mailing Committee review committee determines offers the most advantageous proposal, taking into consideration all required qualifications, submission requirements and comparative selection criteria set forth in the R.F.P., as well as price. Emphasis in selecting a firm will be placed on the chosen firm's level of experience, qualifications, experience of personnel to be assigned, overall services offered, on-going success/satisfaction rate of other clients/contracts on similar current and past projects and overall experience within this category of work.

This Request for Proposal does not commit the TOWN OF ARLINGTON to award a contract, to pay any costs incurred in the preparation of a response to this request, or to procure or contract for any services of any kind.

In the evaluation of any or all proposals, the TOWN OF ARLINGTON, at its discretion, may obtain technical support from outside sources. The Proposers will agree to fully cooperate with the personnel of such outside sources in the evaluation of their proposal. Failure to cooperate may result in the REJECTION of your bid.

Proposal for Bill Printing and Mailing services capabilities

The evaluation process will include each response being reviewed by The Postal Outsourcing Review Committee. Those responses that meet all of the minimum requirements as outlined in the RFP, and are determined to be both responsive (those that offer all of the services requested in the RFP and contain all of the required information and forms properly completed) and those that are responsible (those with the capability, integrity, and reliability to perform under contract) will be further reviewed using the comparative criteria outlined in this section.

For the purpose of evaluation, responses will be divided into the following categories. The following reflects the maximum number of points (100) that may be awarded:

- 1. Responses to Comparative Selection Criteria (52)**
- 2. Overall quality of the Response (6)**
- 3. Technological capabilities and utilization (18)**
- 4. Cost of Services (14)**
- 5. Reference's Evaluation (10)**

For the Comparative Selection Criteria the evaluations listed below are assigned the following points:

Highly Advantageous = 4 points
Advantageous = 2 points
Not Advantageous = 1 point
Unacceptable = 0 point

Evaluation Criteria

The Town of Arlington, MA will evaluate all submitted proposals to determine the most advantageous proposal from a responsible and responsive Proposer, taking into consideration price and the criteria and requirements set forth in this Request for Proposal.

In evaluating proposals, the Town of Arlington, MA will consider the following evaluation criteria:

1. The cost of all bill printing, mailing services and related duties.
2. The individual merits of each responding Proposer. Advantages of any one particular Proposer versus/over other proposers in regard to experience, personnel, and services offered, etc.
3. The success and satisfaction rate of the services a proposer provides to municipal clients and other clients in general, as based on references.
4. The overall level at which each proposer meets and can provide for, the bill printing and mailing services as required by the Town of Arlington, MA, as demonstrated by the ranking each proposal receives as a result of the Comparative Selection Criteria questions.

The Town of Arlington, MA will evaluate all proposals based upon the above criteria and will select the proposal deemed to be in the best interest of the Town of Arlington, MA. The Town of Arlington, MA will not necessarily select the proposal that offers the lowest prices if the other criteria set forth are deemed to be more advantageous to the Town of Arlington, MA than the price.

If the Town of Arlington, MA determines that none of the proposals received is from a viable vendor, or offers a level of services or experience that is in the best interest of the Town of Arlington, MA, in regard to price and required minimum qualifications/specifications, then all proposals will be rejected; this Request for Proposal will be cancelled and no purchase will be made.

Selection Process

As a result of this R.F.P., the Town of Arlington, MA intends to identify a finalist from the proposals received. The Bill Printing and Mailing Services Committee will review all proposals,

rate each of the Comparative Selection Criteria questions and assign a composite rating for each proposal. Background checks, requests for additional information and interviews will be performed as needed.

One contract will be awarded to the one responsive and responsible Proposer who the Bill Printing and Mailing Services Review Committee determines offers the most advantageous proposal, taking into consideration all required qualifications, submission requirements and comparative selection criteria set forth in the R.F.P., as well as price. Emphasis in selecting a firm will be placed on the chosen firm's level of experience, qualifications, experience of personnel to be assigned, overall services offered, on-going success/satisfaction rate of other clients/contracts on similar current and past projects and overall experience within this category of work.

This Request for Proposal does not commit the Town of Arlington, MA to award a contract, to pay any costs incurred in the preparation of a response to this request, or to procure or contract for any services of any kind.

In the evaluation of any or all proposals, the Town of Arlington, MA, at its discretion, may obtain technical support from outside sources. The Proposers will agree to fully cooperate with the personnel of such outside sources in the evaluation of their proposal. Failure to cooperate may result in the REJECTION of your bid.

(TO BE RETURNED WITH THE PRICE PROPOSAL)
Town of Arlington, MA
ADAM CHAPDELAIN, TOWN MANAGER

Proposal for – BILL PRINTING AND MAILING SERVICES

Price Proposal*

Proposers must submit pricing in accordance with the below instructions. Proposers must submit prices for all years of the contract. The proposed pricing is to cover all work/services required for this project as outlined in the Technical Proposal portion of this R.F.P. document. Prices must be all-inclusive, including all costs, fees, charges, expenses, travel, postage, fax and telephone charges, preparation of reports and all meeting attendance if required. No separate fees or costs of any kind will be paid other than the stated prices. All actual postage costs for the mailing of bills will be charged back to the Town of Arlington, MA, via an invoice, by the selected vendor.

Price Escalation Clause

Prices offered by the Proposer must be firm and not subject to increase during the term of the contract. Price escalation clauses over and above the total submitted prices are not allowed. Only the total proposed prices will be accepted. Proposers cannot insert a statement indicating their prices will increase above or beyond their submitted proposed prices due to third party actions or unnamed contingencies. Inclusion of an escalation clause of any kind will result in the REJECTION of the proposal.

Proposal Pricing Calculation

The following proposal pricing will be used/considered as a factor in the final selection of a vendor in addition to all other required criteria in this R.F.P. The total proposal price will be determined by adding up the total prices for each of the four items, for all three years, under the following "Proposal Pricing" section.

(TO BE RETURNED WITH THE PRICE PROPOSAL)

Proposal Pricing

Using the following mailing/printing scenarios, please provide total pricing for each of the **four jobs below.**

1. **Item #1:** Please price out the cost to invoice annually **52,000** Water Bills using a #10 outbound envelope, a #9 inbound envelope and a 8.5" x 11" single invoice, with offset ink printing for both face and back along with micro perforated at the remittance stubs. Please provide all of your individual unit pricing for these items on the form on the following page as well.
2. **Item #2:** Please price out the cost to invoice annually **2,100** Personal Property bills using a #10 outbound envelope, a #9 inbound envelopes and a 8.5" x 11" single invoice, with offset ink printing for both face and back along with micro perforated at the remittance stubs.
3. **Item #3:** Please price out the cost to invoice annually **62,000** Real Estate Tax bills using a #10 outbound envelope, a #9 inbound envelopes and a 8.5" x 11" single invoice, with offset ink printing for both face and back along with micro perforated at the remittance stubs.
4. **Item #4:** Please price out the cost to invoice annually a total of **1,500** Real Estate and Personal Property Demand notices using a #10 outbound envelope, a #9 inbound envelopes

and a 8.5" x 11" single invoice, with offset ink printing for both face and back along with micro perforated at the remittance stubs.

- Item #5: Please price out the cost to invoice annually a total of **30,000** Excise Tax Bills using a #10 outbound envelope, a #9 inbound envelope and a 8.5" x 11" single invoice, with offset ink printing for both face and back along with micro perforated at the remittance stubs.

Please type all numbers

	Year 1	Year 2	Year 3
Pricing-Item # 1	\$	\$	\$
Pricing – Item #2	\$	\$	\$
Pricing – Item #3	\$	\$	\$
Pricing – Item #4	\$	\$	\$
Pricing – Item #5	\$	\$	\$

(TO BE RETURNED WITH THE PRICE PROPOSAL)

Cost Proposal

Please include the following document in the PRICE PROPOSAL envelope. Including this document in the TECHNICAL PROPOSAL will result in REJECTION of your proposal.

DESCRIPTION	UNIT	PRICE YR 1	PRICE YR 2	PRICE YR 3
Invoice Design	per Invoice Type			
#10 Outbound Envelope	per piece			
#9 Inbound Envelope	per piece			
Data Processing	per piece			
Invoice Print	per piece			
Invoice Fold	per piece			
Invoice Stuff	per piece			
#9 Envelope Stuff	per piece			
Postal Preparation	per piece			
Delivery to Post Office	per trip			
Other				
Other				
Other				

*All Price Proposal information must be submitted in a separate sealed envelope. Please refer to the section titled "Submission Requirements", in the technical portion of this document for full instructions.

(TO BE RETURNED WITH THE PRICE PROPOSAL)

Town of Arlington, MA
Town Manager
Proposal for – BILL PRINTING AND MAILING SERVICES

Price Proposal

Proposed vendors are forewarned to include all costs in the above pricing schedule as only those listed will be honored and remunerated.

I, as the representative of the below indicated company, have read all of the technical/service requirements of this Request for Proposal and hereby submit the above price proposal as my submission in response to this R.F.P.

Signature of Authorized Agent

Printed Company Name

Printed Name & Title