



TANEY COUNTY MISSOURI

Purchasing Department 132 David Street / P. O. Box 1630
Forsyth, Missouri 65653

SOLICITATION TITLE: Printing, Mailing & Email Services
RFB #202404-552

SOLICITATION TYPE:

- () = Full / Formal Bid for Products *or* Materials *ONLY*.
- () = Full / Formal Bid for Products *and* Services.
- () = Full / Formal Bid for *Services ONLY*.
- () = Full / Formal Request for Proposals.
- () = Full / Formal Request for Qualifications.

SCHEDULE & DEADLINES:

April 6, 2024 – May 6, 2024

Proposal Release Date / Advertising Period

April 26, 2024

Deadline For Submitting Questions

May 6, 2024 at 5:00 PM

Closing Date / Time

May 7, 2024 at 9:30 AM

Opening Date / Time

Responding Vendor / Company Name

City / State

SERVICES & MATERIALS: \$ _____

+ POSTAGE: \$ _____

TOTAL BID PRICE: \$ _____

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Request for Bid Title: PRINTING, MAILING & EMAIL SERVICES
PLEASE MARK YOUR ENVELOPE "SEALED BID #202404-552"
RETURN ONE (1) ORIGINAL & THREE (3) HARD COPIES.

Bid Submission

Location / Mail Address: Taney County Purchasing Department (Second Floor)
P. O. Box 1630 (PO Box MUST be used for U.S.P.S .delivery.)
132 David St. (Physical Address MUST be used for Courier delivery.)
Forsyth, MO 65653

Bid Opening

Location / Address: Taney County Commission Hearing Room (Old Courthouse)
Forsyth, MO 65653

The undersigned certifies their authority to bind this vendor in an agreement to supply the products, or services, in accordance with all terms, conditions, and pricing specified herein or to offer a "No Bid."

Bidder is REQUIRED to complete, sign and return this form with their submittal to our solicitation as well as **initial all pages**. *An authorized signature and email address, printed clearly is mandatory, lack thereof *may* result in a determination of "Non-Responsive" and disqualify from participation.

_____ Company Name		_____ Authorized Person (Print)	
_____ Address		_____ *Signature	
_____ City / County / State / Zip		_____ Title	
_____ Telephone #	_____ Fax #	_____ Date	_____ Tax ID #
_____ *E-mail (MUST be legible.)		_____ Entity Type (Corporation, LLC, Sole Proprietor, Partnership)	

INTRODUCTION & BASIC PROCESSING INFORMATION:

Sealed bids cannot be emailed and must either be delivered by hand, courier, or U.S.P.S. All formal invitations for bid are handled by the Taney County Purchasing Department. However, technical requirements and product specifications are the responsibility of the specific requesting department as listed in Section 2. Specifications.

Read ALL solicitation documents closely. Note any/all special dates and submit your response as soon as possible. See Items 1.21-1.22 for the process to submit questions.

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Section #1 includes instructions, conditions, guidelines, requirements and other key factors.

**Use a checkmark (✓), in the box adjacent to the section number, in order to acknowledge each of the following items. Any item unchecked in this section, will be considered non-responsive and may be disqualified.**

**Section 1. INSTRUCTIONS AND GENERAL CONDITIONS**

1.1

Sealed responses may be submitted to the Taney County Purchasing Office until the solicitation closing date and time indicated herein, subject to Instructions and General Conditions and any special conditions.

1.2

Closing: *Sealed Responses* must be delivered before “Closing Date/Time” as listed on page one, to the Taney County Purchasing Department as listed on page two.

1.3

United States Postal Service (“U.S.P.S.”) WARNING: Because there is no mail delivery service at our offices, we **strongly** discourage bidders from using the U.S.P.S. If a Bidder elects to use the U.S.P.S., do **NOT** send “return receipt requested.” The Post Office only recognizes the P.O. Box address. Other delivery services require the physical address. It is the Bidder’s responsibility to ensure responses are delivered in a timely fashion to the Purchasing Department. Courier or hand delivery is recommended.

1.4

Late Packages: The County will not accept any response received after the listed closing date/time. Late arrivals are considered “NON-RESPONSIVE” and will not be opened or returned.

1.5

Opening: Bids will be opened publicly at “Opening Date/Time” and read aloud. All responses will be considered public information as soon as they are opened and become a part of the public record to be released to any person or firm who formally requests a copy.

1.6

Award/Timeline: Recommendation for award will be made formally to the Taney County Commission as soon as possible after a complete departmental review. Updates may be sent via email should the award process become delayed, 10 or more days, for any reason.

1.7

Withdrawals: Responses may be withdrawn on written request from the Bidder at the address shown prior to the time of acceptance of the response. Once a response is opened, and accepted, it can only be withdrawn by order of the Taney County Commission.

1.8

Sealed & Marked: Responses must be submitted in a sealed envelope identified with the bid number and dates of closing & opening. List the bid number on the outside surface of the box or envelope and note “*Response to Request for Bid enclosed*” with a return name & address. No fax or electronic transmitted responses will be accepted.

1.9

Bidder Expenses: This County is not responsible for any expenses, which Bidders may incur in estimating, inspecting, or preparing information to respond to this solicitation.

1.10

Presentations/Inspections: The County reserves the right to conduct personal interviews or require presentations, inspections, of or from any/all Bidders prior to selection. The County will not be liable for ANY costs incurred by the Bidder in connection with such interviews, presentations, or inspections.

1.11

Bid Term: All Responses submitted shall be binding and remain firm for ninety (90) calendar days following the opening, unless otherwise indicated. Pricing/Costs submitted with a response must be honored for that set timeframe. Submitted pricing, once opened, cannot be changed for any reason. Any such changes will disqualify that response.

1.12

Bid Rejection: The Taney County Commission reserves the right to reject any or all responses when such rejection is in the best interest of the County.

1.13

Multiple Awards: Responses may be awarded to one company or multiple companies, when such award is deemed in the best interest of the County.

1.14

Payment Terms: Standard payment terms are *Net 30* after receipt of an invoice. The County cannot, and will not, agree to any other payment terms. Once products, or services, are received and accepted, Taney County will process payment in full. Invoices need to be issued and mailed to the requesting department - not Purchasing.

1.15

Requests for credit applications and deposits are not necessary and will – in most cases – not be processed or accepted.

1.16

Any award agreement shall take effect upon the approval by the Taney County Commission.

1.17

Alterations: Any alterations, changes, lining out, or margin notes to any items within these instructions may result in the response being disqualified.

1.18

Direct Email Address: An email address, not a website, **MUST** be provided in order to receive award results. Final award results are by email only and will be emailed to all responding Vendors. Please do not call for results.

1.19

Results are always posted at: [www.taneycounty.org](http://www.taneycounty.org)

1.20

All questions for this solicitation must be submitted by the time indicated on page 1. Questions must be emailed to the department point of contact listed within this request as well as copied (cc) to the Purchasing Director at: [nikki.lawrence@taneycountymo.gov](mailto:nikki.lawrence@taneycountymo.gov)

1.21

If it becomes necessary to revise any part of this solicitation due to a significant question received which could impact specifications; a written Addendum will be issued to explain any new/necessary modifications.

1.22

Any/all solicitation questions that result in modifications will be combined into one written Addendum with answers and explanations to cover any/all new issues.

1.23

Addenda are valid only if in writing and issued by the Taney County Purchasing Department.

1.24

Any necessary Addendum will be emailed as close as possible to the day following the question submission deadline to all parties who had previously been part of the original Direct Bid Invitation email or had made email contact during the open questioning timeframe.

1.25

When an Addendum is necessary, Bidders are required to formally respond. Follow the instructions as indicated in the Addendum.

1.26

Any necessary Addendum will be posted on the Taney County website with the original solicitation. An indication will be in red and placed at the end of the affected proposal.

1.27

Award of Contract: Multiple awards may be made on the basis of a primary, secondary, and tertiary vendor. The primary vendor shall furnish the County's requirements until such time as the County determines that it is in the best interest of the County to seek performance from the secondary vendor, then tertiary vendor. The County's decision to utilize the secondary and tertiary sources shall be final and conclusive. In addition, the resulting contract from this solicitation will be considered "Non-Exclusive". The County reserves the right to obtain service, or product(s), from other vendors when it is in the best interest of the County.

1.28

Agreement: The selected vendor(s) will be required to enter into a written agreement with the County, in cooperation with the County's Legal Services Department and completed to the mutual satisfaction of the parties, consistent with the RFP and response. The RFB and response documents submitted by the successful Bidder will become a part of any contract award as a result of this solicitation. These signed documents will be binding. Bidder shall initial all pages where the document denotes "Bidder's Initials: \_\_\_" at the bottom of the page after completing said page. Any responses not complying with this condition may be considered non-responsive.

1.29

Response Content: In order to enable direct comparison of competing responses, Bidders must submit responses in strict conformity to the requirements stated herein. Failure to adhere to all requirements may result in Bidder's Response being disqualified as non-responsive. All responses must be submitted using the forms provided herein. Every question should be answered. If not applicable, the section should contain "N/A."

1.30

Advice of Award: The County's Responses, Bid Tabulations, and Bid Award information may be viewed on our website at [www.taneycounty.org](http://www.taneycounty.org). (Purchasing Department Page.) If a Vendor wants a copy of the bid tabulation they must include a direct email address, not website, in order to receive results.

1.31

Response Clarification: The County reserves the right to request additional written or oral information from Bidders in order to obtain clarification of responses.

1.32

Rejection or Correction of Responses: Minor irregularities or informalities in any response which are immaterial or inconsequential in nature, neither affected by law nor at substantial variance with bid conditions, may be waived at the County's discretion whenever it is determined to be in the best interest of Taney County, Missouri.

1.33

Evaluation Process: The County's sole purpose in the evaluation process is to determine from among the responses received which one is best suited to meet the County's needs at the lowest possible cost.

1.34

Acceptability: The County reserves the sole right to determine whether goods and/or services offered are acceptable for County use.

1.35

Sunshine Law: All responses to this request will be considered public information as soon as they are opened and become a part of public record subject to disclosure to any person or firm that requests it. Requests for copies of responses, must be made through the Taney County Clerk's Office (417-546-7202) by submitting a Public Service Request Form (PSR). Charges for time spent as well as a cost per page apply and may be collected prior to the making of copies.

## Section 2. SPECIFICATIONS

The Taney County Purchasing Department will accept and review responses to this RFB in an effort to complete the purchase of:

Printing, mailing and email services for the purpose of designing, manufacturing, personalizing and distributing assessment lists for real property, personal and business property, 2<sup>nd</sup> notices and impact post cards.

For questions concerning the below listed specifications, or any other technical questions, please feel free to contact:

Department Contact:

Susan Chapman, Assessor  
Taney County Assessor's Office  
417-546-7241 (off)

[susan.chapman@taneycountymo.gov](mailto:susan.chapman@taneycountymo.gov)

**Please check (✓) off the appropriate box to indicate compliance** with the specifications. The County will always look for 100% COMPLIANCE. These “SPECIFICATIONS” and “STANDARD TERMS AND CONDITIONS” are critical to all County solicitations. If after reviewing each of the following items a potential participant is not able to comply with ALL requirements, reconsider whether to submit a bid response to the solicitation. All “D” check (✓) marks will be considered toward disqualification. Check every item. Any blank item in this section will be considered non-responsive and may disqualify.

**C = Comply with item. (In some cases this will serve as a simple acknowledgement.)**  
**D = Do not / cannot comply with item.**

- | C   | D   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ___ | ___ | 2.1 Contractor will create form which must be approved by the Taney County Assessor and Missouri Tax Commission.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| ___ | ___ | 2.2 Contractor will provide N.C.O.A.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| ___ | ___ | 2.3 Contractor will transport approved lists to mail service provider.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| ___ | ___ | 2.4 Contractor will be responsible for printing tax payer account information on lists, and completing mailing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| ___ | ___ | 2.5 <b>Assessor Logo Adobe:</b> The font style :Sloop Script One for :<br>County of Taney<br>State of Missouri<br>Susan C. Chapman<br>The rest in font style: Adobe Caslon Pro Regular                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| ___ | ___ | 2.6 <b>Personal Property Lists: QTY approximately 30,500</b><br><br>Size: 8.5” x 14” (Grain Long) laser cut sheets<br><br>Paper: 24# OCR Bright White. Must be compatible with all county scanning equipment and U.S. Postal Service reading and sorting equipment.<br>Inks: 2-Color Face: PMS 293 Blue & PMS violet Purple highlight, Data & Barcodes- Black<br><br>1-Color Back: PMS 293 Blue                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| ___ | ___ | 2.7 <b>Personal Property &amp; business PP second notice Postcards: QTY approximately 11,700 combined.</b><br><br>Size: 4 1/4” x 5.5” overall,<br><br>Paper: 9 mil White OCR Bright White stock. Must be compatible with all county scanning equipment and U.S. Postal Service reading and sorting equipment. Samples of previous work must be provided with your bid.<br><br>Inks: 2-Color Face: PMS 293 Blue & PMS violet Purple, Data & Barcodes- Black 1-Color Back: PMS 293 Blue<br><br>Processing: Variably imaged on both sides with different information for 1 <sup>st</sup> and 2 <sup>nd</sup> mailings. Imaging must include variable Origin IMb with tracking services and address change service provided via software portal. Provide examples of this construction, a case study, and references with your bid. |

2.8 **Impact notice Postcards (online filing): Odd years Impact notices quantity approximately 30,000 Even year Impact notices quantity approximately 4000**

Size: 4 1/4" x 5.5" overall,

Paper: 9 mil White OCR Bright White stock. Must be compatible with all county scanning equipment and U.S. Postal Service reading and sorting equipment. Samples of previous work must be provided with your bid.

Inks: 2-Color Face: Black-barcodes and verbiage & PMS 225 Hot Pink for data

2-Color Back: Black & PMS 225 Hot Pink for highlighted paragraph

Processing: Variably imaged on both sides with different information. Imaging must include variable Origin IMb with tracking services and address change service provided via software portal. Provide examples of this construction, a case study, and references with your bid. Note: state required font size on front of impact notice postcards.

2.9 **Envelopes:** Outgoing #10 Special Window Envelope prints in Black ink on 24# white wove with clear poly window patch. Window size must match current envelope. The #9 Window Courtesy Reply Envelope prints both sides in Black ink on 24# white wove paper with special make-ready flap for ease of opening by Assessor. Construction must match current design.

Inks: Face – 3-Colors: PMS 3308 Green & PMS Colors (full bleed) Personal Assessment List uses three PMS colors. Colors bleed off page. Back 1-Color: PMS 3308 Green ink. (INK colors are subject to change each year.)

Print Quality: Ink Density and Registration must be consistent in all colors on both sides of the form.

Artwork: Composition costs for all variations in lists will be included. Extensive design changes may be required. See section below regarding design review and consultation requirements. Logo must match previous logo design for Taney county Envelopes also contain ad for online feature.

2.10 **Business Personal Property Lists: Approximately 4400**

Size: 11" x 14" (Grain Long) laser cut sheets,

Paper: 24# OCR Bright canary. Grain direction must be compatible with all County scanning equipment and reflectance meeting U.S. Postal Service standards reading and sorting equipment.

Inks: Face – 2-Colors: PMS 3308 Green and PMS 675 Hot Pink ink. Data & Barcodes- Black Back -1-Color: PMS 3308 Green. (INK colors are subject to change each year.)

Envelopes: Outgoing #10 Special Window Envelope prints in PMS Green ink on 24# white wove with clear poly window patch. Return #9 Regular Envelope prints in Black ink on 24# color wove (yellow) for with special make-ready flap for ease of opening by Assessor. Printed assessor logo and email advertisement on all envelopes

Print Quality: Ink Density and Registration must be consistent in all colors on all sides of the form.

Quantities: Successful bidder will guarantee an adequate number of forms to meet the needs for both mailings, and internal office use. In the event of a shortage supplier will guarantee makeup quantity at same cost per unit as original bid.

Design/Consultation: Your bid will include a minimum of **8 hours** consultation with the County Assessor to work out details of your proposed layout/design of the Assessment List(s), **and at least Four (4) follow up meetings in the County Assessor's Office or by web video.** You will guarantee that your design conforms to all state legislation in effect prior to final proof date. The design will also meet all current requirements of the Missouri State Tax Commission.



**Delivery Schedule:** Proofs delivered by October 15<sup>th</sup>

N.C.O.A. printouts delivered by the following date: Nov. 1<sup>st</sup>

Bill for initial Postage delivered by: Dec. 2<sup>nd</sup>

The initial mailing will drop on the following date: Jan 6<sup>th</sup>

Bill for printing/paper will be mailed by Jan 15<sup>th</sup>

Bill for postage 2<sup>nd</sup> mailing of Personal/Bus PP postcards Feb 19<sup>th</sup>

The second mailing will drop on the following date: March 20<sup>th</sup>

Final bill for PP/bus PP overages. March 27<sup>th</sup>

Postage bill for impact notice post cards due on April 21<sup>st</sup>

Impact notice postcards will drop on May 15<sup>th</sup> 2024

Final bill for impact notices delivered by May 28<sup>th</sup>

2.11 **EMAIL Adaption:** eNotices for online filing:

**Description of eNotices Services at Product Launch:**

- Online Presentment of PDF statement – a replica of what is mailed
- E-mail notification to owner that statement is ready for viewing.
- One Code Authentication for multiple parcels when name and address are identical between two or more parcels.
- Secure access
- Immediate access to eNotices upon registration – no waiting!
- Seamless Ownership Changes ensures new owners receive their statements.
- One Data Upload takes care of both print mailing and eNotices
- Robust Report Generation – detailing who accessed, when, how many times, etc.
- Email generation can be initiated by the County to email blast those who have signed up – i.e. 2nd half reminders!
- Identical PDF's of every statement will be uploaded to eNotices same day printed statements are mailed
- Servicer must provide customer emails gleaned from the process for the assessor data base. Assessor cama will supply email addresses available already.
- \$ per statement registered on online cost
- A working link to Taney County online payment site. (This will be provided by Assessor)

Data tapes will be provided **ONE WEEK** prior to mailing.

**All Assessment Lists must be mailed from the US Post Office**

**Copies of the forms, Individual and Business will be submitted to the County Assessor no later than October 15, of the applicable contract year in order for the design and wording to be approved in writing by the Missouri State Tax Commission prior to printing and mailing.**

The successful bidder will provide, by January 1, of the applicable contract year, to the Assessor a copy of each assessment form, individual and business, in Adobe Acrobat PDF file format for the Assessor's use as needed.

Documentation: Receipts from the U.S. Postal Service substantiating that the mailings were handled by them on the required dates will be provided to the Assessor within (5) working days after the mailing date.

2.12 Imaging of Variable Information (Addressing, etc.):

The county and Cama company Ulrich will provide successful bidder with data files containing taxpayer names, addresses, taxpayer ID numbers, taxing districts, previous year's property information, and other information to be printed on the Lists. Variable information could span entire surface of form. Supplier may need to merge data from multiple files to create finished mailing database. There will be 2 or more separate mailing lists for each mailing. Data will need to be extracted from the master file based on type of mailing.

Data File Integrity: Supplier will guarantee the integrity of each taxpayer's information and assume responsibility for printing all related pieces of information for the individual taxpayer on the assessment list. Supplier will demonstrate to the satisfaction of the county what steps will be taken to avoid file corruption

Placement on Page: Variable information must be accurately lined up with headings, and the address must be situated in the proper location to meet specifications for postal automation discounts. Taxpayer information and bar codes must be sized and placed the same on all lists. (Personal Assessment Lists and Business Assessment Lists: 1st and 2nd mailings)

2.13 Bar Coding of Taxpayer ID Number:

Symbology: Code 3 of 9 (compressed), must scan account number with 4 digit year following. Human-readable account number directly above or below the code.

Print Quality: All bar codes must meet or exceed an ANSI grade "A". The ANSI standard for bar code print quality is X3.182. Successful bidder will demonstrate statistical sampling method used during verification process in the production of bar codes. The Bar Code must be permanent, and continue to be readable for a period of 5 years after initial imaging.

Ability to Scan: Supplier must guarantee decoding with all types of hand scanning equipment and document imaging systems used by the county must be guaranteed for all bar codes. Samples must be provided for testing prior to mailing.

Use of Labels: The bar code must be printed on the Assessment Lists and the 2<sup>nd</sup> notice postcards. The use of labels for this feature is not acceptable.

2.14 Postal Processing:

Design: The design of the piece must allow for efficient processing through postal reading and sorting equipment with minimal damage to the piece.

Print Quality: All printed information must be legible, and provide adequate print contrast to meet postal equipment scanning requirements.

Quantity Mailed: Successful bidder will provide evidence regarding the number of pieces mailed by way of a certified report within 5 working days of mailing. PS Form 3600-FCM

2.15 Mailing List Maintenance:

N.C.O.A. & Address

Management Services: National Change of Address list processing services will be provided by successful bidder. For address changes indicated by NCOA a **printout** of the old addresses matched with the new address, and Taney County Personal Property account number will be forwarded to the county. Costs for this service, including handling of printouts will be itemized on your bid.

**NOTE:** In addition to NCOA and CASS certification, bidder must have processes in place to correct more than 75% of the undeliverable addresses in the mailing data file prior to mailing. Post-mailing address management services will be required as follows: 1) Bidder will provide software

for tracking all mail, and will provide address correction reports for a period of three months after each mailing. Please describe these address management processes in detail on your bid.

Ancillary Postal

Endorsements: A cost analysis for the use of Ancillary Postal Endorsements will be provided to the county with your bid. Suggestions on reducing the handling and postage costs for undeliverable pieces, and for pieces that are forwarded will be evaluated by the county.

\_\_\_ \_\_\_ 2.16 Postage Costs:

Postal Discounts: Reducing postage costs is very important to the county. The successful bidder will guarantee postage discounts based on the automation rate, plus additional discounts for 5-digit sorts, Carrier Route Sorts, DSCF sorts, and any additional presorts that apply. To allow for maximum postal discounts the physical characteristics of the mail piece and the addressing format must comply with all postal specifications for automated mailings. Supplier will provide exact postage costs based on CASS Certification, and Pre-Sorting of the mailing lists as indicated above and will guarantee these postage costs at time of mailing. Supplier will be responsible for all transactions with the U.S. Postal Service including remitting payment for postage and purchasing all permits required for mailings. If at the time of the mailing it is found that the pieces cannot be mailed at the rate quoted on your original bid you will be responsible for paying the difference in postage costs to the post office.

\_\_\_ \_\_\_ 2.17 Shipping:

Shipping Costs: All shipping costs will be included in your bid. This includes delivery of loose forms or pads to the Assessor's Office in December, the return of all inventory remaining after second mailing in March, NCOA printouts, and any samples submitted for approval.

\_\_\_ \_\_\_ 2.18 **All Vendors must submit a 2020 paid Personal Tax receipt or waver.**

\_\_\_ \_\_\_ 2.19 State deviations (if any) from given project specifications and identify subcontractors. Bidder may insert an additional sheet to provide information if necessary.

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\_\_\_ \_\_\_ 2.20 **Samples:**

Samples of the Assessment Forms and Envelopes may obtained through the Taney County Assessor Department, Forsyth Missouri. Please be advised to maintain accuracy of the above described projects we are recommending samples be obtained by the prospective vendor before completing the bid process.

\_\_\_ \_\_\_ 2.21 **PRICING: Postage MUST be listed separately for each bid section.**

Pursuant to and in accordance with the above stated Invitation for Bid, the undersigned hereby declares that they have examined the RFP documents and specifications for the item(s) listed below. The undersigned proposes and agrees, if their bid is accepted to furnish the item(s) submitted below, including delivery to Taney County, Missouri in accordance with the delivery schedule and according to the prices, products / services information submitted.

**SECTION 1**

**FIRST MAILING**

**FORMS PRINTING:**

| Bid Item | Qty.           | Description                                                                                                                                                                              | Unit Price | Total \$ Amount |
|----------|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------------|
| a.       | 33,900         | Personal Property (29,500) Assessment Lists for 1 <sup>st</sup> mailing only. Business Personal Property (4,400)                                                                         | \$         | \$              |
| b.       | 1              | Personal Property Assessment Lists (lists for use in office) An electronic form to Ulrich for in office use after the 1 <sup>st</sup> mailing.                                           | \$         | \$              |
| c.       | 33,900         | #10 white special window envelopes                                                                                                                                                       | \$         | \$              |
| d.       | 33,900         | #9 white special window envelopes                                                                                                                                                        | \$         | \$              |
| e.       | 1 Lot          | Cost of art work<br>Consultation                                                                                                                                                         | \$         | \$              |
| f.       | 1              | Business Personal Property Lists (11" x 17") (lists for use in office) Copy of list in form that Ulrich can input into system for printing from office after the 1 <sup>st</sup> mailing | \$         | \$              |
| g.       | 1 Lot          | Cost of art work<br>design/consultation                                                                                                                                                  | \$         | \$              |
| h.       | 1 Each / Piece | <b>BAR CODING OF TAXPAYER ID NUMBER:</b> (With tax year included in bar code)<br><br>Price per piece to bar code                                                                         | \$         | \$              |
| i.       | 1 Each / Piece | <b>ADDRESSING:</b> Price per piece to print taxpayer's name and address                                                                                                                  | \$         | \$              |
| j.       | 1 Each / Piece | <b>OTHER INFORMATION:</b><br><br>Price per piece to print other information                                                                                                              | \$         | \$              |
| k.       | 1 Each / Piece | <b>POSTAL PROCESSING:</b><br><br>Price per piece to fold, insert, and presort by zip code for delivery to the US Post Office.                                                            |            |                 |
| l.       | 1 Each / Piece | <b>POSTAGE COSTS:</b><br><br>Price per piece to be mailed First Class Mail from the US Post Office.                                                                                      |            |                 |
| m.       | 33,900         | <b>NCOA PROCESSING:</b> (approximately 33,900 names) price per name.                                                                                                                     |            |                 |
| n.       |                | <b>SHIPPING:</b><br><br>State all shipping costs that apply                                                                                                                              |            |                 |
| o.       |                | USB drive mailed to Assessor's Office with PDF copies of all printed & mailed Lists and a List in Excel of Names, complete Addresses and E-mail                                          |            |                 |

**TOTAL BID PRICE FOR SECTION 1 (items a – o)**

\$ \_\_\_\_\_

*Total Print & Process  
+ Postage  
= Total*

For all Contractor's services, labor, materials, tools, equipment, supplies, transportation and all other items and facilities necessary to complete the work specified

\$ \_\_\_\_\_

(Amount written in words)

**SECTION 2**

**SECOND MAILING**

**FORMS PRINTING:**

Date must be changed on assessment form to reflect due dates. First mailing and second mailing have different dates. Second notice will be marked "Second Notice".

| Bid Item | Qty.           | Description                                                                                                                                     | Unit Price | Total \$ Amount |
|----------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------------|
| p.       | 11,700         | Post cards for Personal Property and Business Personal Property (second notice)                                                                 | \$ /M      | \$              |
| q.       | 1 Lot          | Cost of art work design/consultation                                                                                                            | \$         | \$              |
| r.       | 1 Each / Piece | <b>BAR CODING OF TAXPAYER ID NUMBER:</b> (Followed by Tax Year)<br>Price per piece to bar code:                                                 | \$         | \$              |
| s.       | 1 Each / Piece | <b>ADDRESSING:</b><br>Price per piece to print taxpayer's name and address                                                                      | \$         | \$              |
| t.       | 1 Each / Piece | <b>OTHER INFORMATION:</b><br>Price per piece to print other information:                                                                        | \$         | \$              |
| u.       | 1 Each / Piece | <b>POSTAL PROCESSING:</b><br>Price per piece to fold, insert, and presort by zip code for delivery to the US Post Office.                       | \$         | \$              |
| v.       | 1 Each / Piece | <b>POSTAGE COSTS:</b><br>Price per piece to be mailed First Class Mail from the US Post Office.                                                 | \$         | \$              |
| w.       | 32,900         | <b>NCOA PROCESSING: (approximately 32,900 names)</b><br>Price per name                                                                          | \$         | \$              |
| x.       |                | <b>SHIPPING:</b><br>State all shipping costs that apply:                                                                                        | \$         | \$              |
| y.       |                | USB drive mailed to Assessor's Office with PDF copies of all printed & mailed Lists and a List in Excel of Names, complete Addresses and E-mail |            |                 |

**TOTAL BID PRICE FOR SECTION 1 (items p – y)**

\$ \_\_\_\_\_  
*Total Print & Process*  
 + Postage  
 = Total

For all Contractor's services, labor, materials, tools, equipment, supplies, transportation and all other items and facilities necessary to complete the work specified

\$ \_\_\_\_\_  
 (Amount written in words)

**SECTION 3**

**IMPACT CARDS**

| Bid Item | Qty.   | Description                                                                                                                                     | Unit Price | Total \$ Amount |
|----------|--------|-------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------------|
| z.       | 30,000 | Post Cards for Impact Notices (on every <b>ODD</b> year)                                                                                        | \$         | \$              |
| aa.      | 3,500  | Post Cards for Impact Notices (on every <b>EVEN</b> year)                                                                                       | \$         | \$              |
| bb.      | 1 Lot  | Cost of artwork/design/consultation                                                                                                             | \$         | \$              |
| cc.      | 1      | <b>BAR CODING OF TAXPAYER ID NUMBER:</b><br>(Followed by Tax Year)<br><br>Price per piece to bar code                                           | \$         | \$              |
| dd.      | 1      | <b>ADDRESSING:</b><br><br>Price per piece to print taxpayer's name and address                                                                  | \$         | \$              |
| ee.      |        | <b>OTHER INFORMATION:</b><br><br>Price per piece to print other information                                                                     | \$         | \$              |
| ff.      |        | <b>POSTAL PROCESSING:</b><br><br>Presort by zip code for delivery to the US Post Office                                                         | \$         | \$              |
| gg.      |        | <b>POSTAGE COSTS:</b><br><br>Price per piece to be mailed First Class Mail from the US Post Office                                              | \$         | \$              |
| hh.      |        | <b>NCOA PROCESSING:</b><br>(approximately 30,000 names)<br><br>Price per name                                                                   | \$         | \$              |
| ii.      |        | <b>SHIPPING:</b> State all shipping costs that apply                                                                                            | \$         | \$              |
| jj.      |        | USB drive mailed to Assessor's Office with PDF copies of all printed & mailed Lists and a List in Excel of Names, complete Addresses and E-mail |            |                 |

**TOTAL BID PRICE FOR SECTION 1 (items z – jj)**

\$ \_\_\_\_\_  
*Total Print & Process  
 + Postage  
 = Total*

For all Contractor's services, labor, materials, tools, equipment, supplies, transportation and all other items and facilities necessary to complete the work specified

\$ \_\_\_\_\_  
 (Amount written in words)

**SECTION 4**

**eNOTICES**

| Bid Item | Qty. | Description                                                        | Unit Price | Total \$ Amount |
|----------|------|--------------------------------------------------------------------|------------|-----------------|
| kk.      |      | Cost per registered statement                                      | \$         | \$              |
| ll.      |      | Pricing per piece for processing, upload and storage in PDF Format | \$         | \$              |
| mm.      |      | Printed logo advertisement on #10 outgoing envelope                | \$         | \$              |

|     |  |                                                                                                                                                 |    |    |
|-----|--|-------------------------------------------------------------------------------------------------------------------------------------------------|----|----|
| nn. |  | Printed logo advertisement on #9 return envelope                                                                                                | \$ | \$ |
| oo. |  | 3.5 x 8.5 eNotice inserts to advertise sign-up                                                                                                  | \$ | \$ |
| pp. |  | Setup Fee and Options if more than one (1) office signs-up                                                                                      | \$ | \$ |
| qq. |  | USB drive mailed to Assessor's Office with PDF copies of all printed & mailed Lists and a List in Excel of Names, complete Addresses and E-mail |    |    |
| rr. |  | Excel spreadsheet (unlocked) with names, account numbers & email addresses included on the USB drive mentioned above in qq.                     |    |    |

**TOTAL BID PRICE FOR SECTION 1 (items kk – qq)** \$ \_\_\_\_\_

For all Contractor's services, labor, materials, tools, equipment, supplies, transportation and all other items and facilities necessary to complete the work specified

\$ \_\_\_\_\_  
(Amount written in words)

**GRAND TOTAL BID PRICE (TOTALS FOR SECTIONS 1-4)** For all Contractor's services, labor, materials, tools, equipment, supplies, transportation and all other items and facilities necessary to provide items specified:

\$ \_\_\_\_\_  
*(Please also include the total bid price on the cover page of this solicitation.)*

- \_\_\_ \_\_\_ 2.22 Provide the physical address and telephone number of backup facilities with the same capability and capacity as the primary facility to ensure its ability to complete this contract in the event of a disaster or disruption of some sort, rendering the intended production facility inoperable. Backup production should be able to recover within 24 hours of original disruption.
- \_\_\_ \_\_\_ 2.23 Provide account holder with the option to sign up and receive all future statements electronically without a printed statement delivered by the US Postal Service. Electronic notice must provide a means to uniquely verify the individual registering to ensure validity of the registrant and validate email address prior to acceptance into the paperless system. Replica PDF images of the statement mailed must be made available to the account holder for viewing at any time of day or night via vendor's site. Ownership/Account holder changes must be handled by vendor without any action needed by (the County). Prior account holder should no longer receive the statement while new account holder is given opportunity to register for the paperless option.
- \_\_\_ \_\_\_ 2.24 In order to ensure the greatest efficiency, without delay and with seamless processing, all services outlined in this RFP must be provided by the mail service vendor. No portion of these services are to be subcontracted.
- \_\_\_ \_\_\_ 2.25 Shall be familiar with and/or capable of working with Ulrich Software, Inc.
- \_\_\_ \_\_\_ 2.26 Provide contact names and numbers & email, include one (1) person responsible for all projects and their backup.

**NOTE: Bidders must procure and maintain, at a minimum, the following policies of insurance against all claims for injuries against persons or damage to property which may arise from or in connection with the performance of the subject matter of the request for bid: (1) workers' compensation insurance for all employees as required by state law; (2) comprehensive general liability insurance in an amount not less than \$500,000 per occurrence and \$3,000,000 in aggregate, covering both bodily injury and property damage, including accidental death; (3) automobile liability insurance during the term of the Agreement not less than \$500,000 per occurrence and \$3,000,000 in aggregate, covering both bodily injury, including accidental death, and property damage to protect themselves from any and all claims; and (4) insurance for loss of materials, supplies, tools and equipment during the term of the Agreement in an amount which will adequately cover the potential loss or damage to such items. The bidder shall furnish the County with Certificates of Insurance establishing the insurance requirements as set forth in this section. Each policy of insurance must contain a thirty (30) day mandatory cancellation notice.**

**Bidder's Initials \_\_\_\_\_**



### 3. STANDARD TERMS AND CONDITIONS

- | C   | D   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ___ | ___ | 3.1 The awarded bidder shall furnish the goods or services described in Section 2. Specifications.                                                                                                                                                                                                                                                                                                                                                                                                                              |
| ___ | ___ | 3.2 All pricing MUST remain in effect, without increase, for at least one year from the date of the effective date of the awarded contract. Do not include Federal Excise Tax or Sales and Use Taxes in Bid process, as the County is exempt.                                                                                                                                                                                                                                                                                   |
| ___ | ___ | 3.3 The County will not be required to purchase any/all from a specific vendor, nor be held to any minimums/maximums, even if quantities are listed within the RFB or response.                                                                                                                                                                                                                                                                                                                                                 |
| ___ | ___ | 3.4 Total bid price MUST include delivery to the address set forth in Section 2. Specifications. Responses shall include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the County Department identified in this Request for Bid.                                                                                                                                                                                                                                                       |
| ___ | ___ | 3.5 Include an updated W-9 form with company information and signature, with formal, legal, company name.                                                                                                                                                                                                                                                                                                                                                                                                                       |
| ___ | ___ | 3.6 The Taney County Commission has the right to accept or reject any part or parts of all bids, to waive any informalities or technicalities and to accept the offer the County Commission considers the most advantageous to the County. Taney County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County.                                                                                                                              |
| ___ | ___ | 3.7 Bidders must use the bid forms provided, must return the completed bid and bid sheets, provide the unit price, quantity and extended totals, and sign the bid.                                                                                                                                                                                                                                                                                                                                                              |
| ___ | ___ | 3.8 When products or materials of any particular manufacturer are mentioned in specifications, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.                                                                                                                                                                                                                                                                                                              |
| ___ | ___ | 3.9 The delivery date shall be identified by specific date, unless otherwise indicated.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| ___ | ___ | 3.10 The County Commission reserves the right to cancel all or any part of an order if delivery is not made or work is not started or completed as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.                                                                                                                                                                                                                                                                                          |
| ___ | ___ | 3.11 The County may utilize state or federal grant funds in the procurement of goods and services which may require a provider of goods or services to comply with certain state or federal laws, rules and regulations applicable to the funds and may require inclusion and compliance with certain contract clauses required by the state or federal government to an agreement with the County. Any questions regarding the applicability of state or federal requirements should be directed to the Purchasing Department. |
| ___ | ___ | 3.12 In the event of a discrepancy between a unit price and an extended line item price, the unit price shall govern.                                                                                                                                                                                                                                                                                                                                                                                                           |
| ___ | ___ | 3.13 Should an audit of invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charge to the County above the contract terms, the Contractor shall issue a refund check to the County for any over-charges within 30 days of notification.                                                                                                                                                                                      |
| ___ | ___ | 3.14 <b>Cooperative Procurement:</b> The vendor should indicate by checking "Yes" or "No" if the vendor will honor the submitted prices and terms for purchase by other entities that participate in cooperative purchasing with Taney County, Missouri.<br>Yes_____ No_____                                                                                                                                                                                                                                                    |

#### 4. FINAL COMPLIANCE CHECKLIST

By using the below table as a checklist you will help to insure that your proposal is fully compliant before you seal it for submission. Your full proposal response needs to comply with **all** of the below listed requirements or it may **not** be included for consideration. **Use a checkmark (✓) next to each item to avoid leaving out required information or missing an instruction which could cause your response to be disqualified.** Please call or email me with any questions pertaining to these requirements or any other written instructions.

Nikki Lawrence, Director of Purchasing  
 Office: 417-546-7281 / FAX: 417-546-3931  
[nikki.lawrence@taneycountymo.gov](mailto:nikki.lawrence@taneycountymo.gov)

(✓) = Acknowledge intent to comply with the following item:

| ITEM # | FINAL COMPLIANCE CHECKLIST                                                                                                                                                                                                                                                       | (✓) |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| 6.1    | The County will not accept any late proposals. Late packages will not be opened or returned.                                                                                                                                                                                     |     |
| 6.2    | No fax or electronic transmitted proposals will be accepted.                                                                                                                                                                                                                     |     |
| 6.3    | Please include a current/signed W-9 form with your company information. Taney County Accounts Payable Department cannot process payment(s) without a current W9. The name and address on your W9 will be used as the formal name/address on any subsequent post-award Agreement. |     |
| 6.4    | Remember to sign the mandatory proposal sheet. Missing signatures <u>WILL</u> disqualify.                                                                                                                                                                                        |     |
| 6.5    | Un-readable responses, including an unreadable email address, <u>WILL</u> disqualify.                                                                                                                                                                                            |     |
| 6.6    | Submit the original bid response plus three complete copies of the bid response. Please indicate copies versus original. One sided copies <u>ONLY</u> - no double-sided responses.                                                                                               |     |
| 6.7    | ALL pages of the bid document must be initialed by hand, not typed, on the bottom of each page. Incomplete responses may result in disqualification.                                                                                                                             |     |

**NO BID RESPONSE FORM:** Completion of this form is optional and is included within solicitations as an additional tool to improve future solicitation processes. If you, or your company, have decided not to participate and *not* offer a proposal, please complete the below form and return it to the Purchasing Department by email.

#### RFB #202404-552 Printing, Mailing and Email Services

|                                                                                        |  |
|----------------------------------------------------------------------------------------|--|
| Business Name:                                                                         |  |
| Address:                                                                               |  |
| Telephone:                                                                             |  |
| Contact Person:                                                                        |  |
| Date:                                                                                  |  |
| Reason(s) for not Submitting:                                                          |  |
|                                                                                        |  |
|                                                                                        |  |
| Would you like to be removed from our list(s) for future proposals/bids? ( Yes or No.) |  |

\*\*\*\*\*