



**REQUEST FOR PROPOSALS (EPP-RFP) No. 0114-2-OTR  
FOR  
Printing Services and Optional Mailing Services**

**PRE-PROPOSAL CONFERENCE TO BE HELD:**

\_\_\_\_\_, 2013 at \_\_:00 AM (local time)  
111 NW 1<sup>st</sup> Street, 13<sup>th</sup> Floor, Conf. Rm. \_\_, Miami, Florida

**ISSUED BY MIAMI-DADE COUNTY OFFICE OF THE PROPERTY APPRAISER**

Administration Division  
(Through the Expedited Purchasing Program)  
for

IT and Investigations Divisions

**COUNTY CONTACT FOR THIS SOLICITATION:**

Name and Title: J.C. Romano, CPPB Property Appraiser Procurement Manager  
Address: 111 NW 1<sup>st</sup> Street, Suite 710, Miami, Florida 33128  
Telephone: (305) 375-4262  
E-mail: [jromano@miamidade.gov](mailto:jromano@miamidade.gov)

**PROPOSALS ARE DUE AT THE CLERK OF THE BOARD NO LATER THAN:**

\_\_\_\_\_, 2013 at 2:00 PM (local time)  
at  
CLERK OF THE BOARD  
Stephen P. Clark Center  
111 NW 1<sup>st</sup> Street, 17<sup>th</sup> Floor, Suite 202  
Miami, Florida 33128-1983

The Clerk of the Board business hours are 8:00 a.m. to 4:30 p.m., Monday through Friday. Additionally, the Clerk of the Board is closed on holidays observed by the County.

All proposals received and time stamped by the Clerk of the Board prior to the proposal submittal deadline shall be accepted as timely submitted. The circumstances surrounding all proposals received and time stamped by the Clerk of the Board after the proposal submittal deadline will be evaluated by the PA in consultation with the County Attorney's Office to determine whether the proposal will be accepted as timely. Proposals will be opened promptly at the time and date specified. The responsibility for submitting a proposal on or before the stated time and date is solely and strictly the responsibility of the Proposer. The PA will in no way be responsible for delays caused by mail delivery or caused by any other occurrence. All expenses involved with the preparation and submission of proposals to the PA, or any work performed in connection therewith, shall be borne by the Proposer(s).

The submittal of a proposal by a Proposer will be considered by the PA as constituting an offer by the Proposer to perform the required services at the stated prices. A Proposer may submit a modified proposal to replace all or any portion of a previously submitted proposal up until the proposal due date. The PA will only consider the latest version of the proposal.

Requests for additional information or inquiries must be made in writing and received by the PA's contact person for this Solicitation. The PA will issue responses to inquiries and any changes to this Solicitation it deems necessary in written addenda issued prior to the proposal due date. Proposers who obtain copies of this Solicitation from sources other than the County's Internal

Services Department website at [www.miamidade.gov/dpm](http://www.miamidade.gov/dpm) or the Vendor Assistance Unit risk the possibility of not receiving addenda and are solely responsible for those risks.

**1.0 PROJECT OVERVIEW AND GENERAL TERMS AND CONDITIONS**

**1.1 Introduction**

The Miami-Dade County Office of the Property Appraiser, hereinafter referred to as the PA, as represented by the PA IT and Investigative Divisions, is soliciting proposals for printing services for the year round mailings submitted by the PA. The PA is seeking proposals from printing firms with experience in performing these types of services which require various drop dates per Florida Statutes and State of Florida Department of Revenue Rules and Regulations.

The PA anticipates awarding a contract for a two year period, with three, two-year options to renew, at the PA's sole discretion.

The anticipated schedule for this Solicitation is as follows:

Solicitation issued:

Pre-Proposal Conference:

See front cover for date, time and place. Attendance is recommended but not mandatory. If you need a sign language interpreter or materials in accessible format for this event, please call the ADA Coordinator at (305) 375-2013 or email [hjwrig@miamidade.gov](mailto:hjwrig@miamidade.gov) at least five days in advance.

Deadline for receipt of questions:

Proposal due date:

See front cover for date, time and place.

Evaluation process:

Projected award date:

**1.2 Definitions**

The following words and expressions used in this Solicitation shall be construed as follows, except when it is clear from the context that another meaning is intended:

1. The word "Contractor" to mean the Proposer that receives any award of a contract from the as a result of this Solicitation, also to be known as "the prime Contractor".
2. The word "County" to mean Miami-Dade County, a political subdivision of the State of Florida.
3. The word "Proposer" to mean the person, firm, entity or organization, as stated on Form A-1, submitting a response to this Solicitation.
4. The words "Scope of Services" to mean Section 2.0 of this Solicitation, which details the work to be performed by the Contractor.
5. The word "Solicitation" to mean this Request for Proposals (RFP) or Request for Qualifications (RFQ) document, and all associated addenda and attachments.
6. The word "Subcontractor" to mean any person, firm, entity or organization, other than the employees of the Contractor, who contracts with the Contractor to furnish labor, or labor and materials, in connection with the Services to the County, whether directly or indirectly, on behalf of the Contractor.
7. The words "Work", "Services", "Program", or "Project" to mean all matters and things that will be required to be done by the Contractor in accordance with the Scope of Services and the terms and conditions of this Solicitation.

**1.3 General Proposal Information**

The PA may, at its sole and absolute discretion, reject any and all or parts of any or all responses; accept parts of any and all responses; further negotiate project scope and fees; postpone or cancel at any time this Solicitation process; or waive any irregularities in this Solicitation or in the responses received as a result of this process. A proposal shall be the Proposer's firm commitment to provide the goods and services solicited in the manner requested in the Solicitation and described in the proposal. In the event that a Proposer wishes to take an exception to any of the terms of this Solicitation, the Proposer shall clearly indicate the exception in its proposal. No exception shall be taken where the Solicitation specifically states that exceptions may not be taken. Further, no exception shall be allowed that, in the County's sole discretion, constitutes a material deviation from the requirements of the Solicitation. Proposals taking such exceptions may, in the County's sole

discretion, be deemed nonresponsive. The PA reserves the right to request and evaluate additional information from any respondent regarding respondent's responsibility after the submission deadline as the PA deems necessary.

Proposals shall be irrevocable until contract award unless the proposal is withdrawn. A proposal may be withdrawn in writing only, addressed to the PA contact person for this Solicitation, prior to the proposal due date or upon the expiration of 180 calendar days after the opening of proposals.

Proposers are hereby notified that all information submitted as part of, or in support of proposals will be available for public inspection after opening of proposals, in compliance with Chapter 119, Florida Statutes, popularly known as the "Public Record Law". The Proposer shall not submit any information in response to this Solicitation which the Proposer considers to be a trade secret, proprietary or confidential. The submission of any information to the PA in connection with this Solicitation shall be deemed conclusively to be a waiver of any trade secret or other protection, which would otherwise be available to Proposer. In the event that the Proposer submits information to the PA in violation of this restriction, either inadvertently or intentionally, and clearly identifies that information in the proposal as protected or confidential, the PA may, in its sole discretion, either (a) communicate with the Proposer in writing in an effort to obtain the Proposer's written withdrawal of the confidentiality restriction or (b) endeavor to redact and return that information to the Proposer as quickly as possible, and if appropriate, evaluate the balance of the proposal. Under no circumstances shall the PA request the withdrawal of the confidentiality restriction if such communication would in the County's sole discretion give to such Proposer a competitive advantage over other proposers. The redaction or return of information pursuant to this clause may render a proposal non-responsive.

Any Proposer who, at the time of proposal submission, is involved in an ongoing bankruptcy as a debtor, or in a reorganization, liquidation, or dissolution proceeding, or if a trustee or receiver has been appointed over all or a substantial portion of the property of the Proposer under federal bankruptcy law or any state insolvency law, may be found non-responsible. To request a copy of any ordinance, resolution and/or administrative order cited in this Solicitation, the Proposer must contact the Clerk of the Board at (305) 375-5126.

#### **1.4 Cone of Silence**

Pursuant to Section 2-11.1(t) of the Miami-Dade County Code, as amended, a "Cone of Silence" is imposed upon each RFP or RFQ after advertisement and terminates at the time a written recommendation is issued. The Cone of Silence prohibits any communication regarding RFPs or RFQs between, among others:

- potential Proposers, service providers, lobbyists or consultants **and** the County's professional staff including, but not limited to, the Property Appraiser/County Mayor and the Property Appraiser/County Mayor's staff, County Commissioners or their respective staffs;
- the County Commissioners or their respective staffs **and** the County's professional staff including, but not limited to, the Property Appraiser/County Mayor and the Property Appraiser/County Mayor's staff; or
- potential Proposers, service providers, lobbyists or consultants, any member of the County's professional staff, the Property Appraiser, Mayor, County Commissioners or their respective staffs **and** any member of the respective selection committee.

The provisions do not apply to, among other communications:

- oral communications with the staff of the Vendor Assistance Unit, the responsible Procurement Agent or Contracting Officer, provided the communication is limited strictly to matters of process or procedure already contained in the solicitation document;
- oral communications at pre-proposal conferences, oral presentations before selection committees, contract negotiations during any duly noticed public meeting, public presentations made to the Board of County Commissioners during any duly noticed public meeting; or
- communications in writing at any time with any PA employees, official or member of the Board of County Commissioners unless specifically prohibited by the applicable RFP or RFQ documents.

When the Cone of Silence is in effect, all potential vendors, service providers, bidders, lobbyists and consultants shall file a copy of any written correspondence concerning the particular RFP or RFQ with the

Clerk of the Board, which shall be made available to any person upon request. The PA shall respond in writing (if PA deems a response necessary) and file a copy with the Clerk of the Board, which shall be made available to any person upon request. Written communications may be in the form of e-mail, with a copy to the Clerk of the Board at [clerkbcc@miamidade.gov](mailto:clerkbcc@miamidade.gov).

### **1.5 Public Entity Crimes**

Pursuant to Paragraph 2(a) of Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal for a contract to provide any goods or services to a public entity; may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit proposals on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and, may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

### **1.6 Lobbyist Contingency Fees**

- a) In accordance with Section 2-11.1(s) of the Code of Miami-Dade County, after May, 16, 2003, no person may, in whole or in part, pay, give or agree to pay or give a contingency fee to another person. No person may, in whole or in part, receive or agree to receive a contingency fee.
- b) A contingency fee is a fee, bonus, commission or non-monetary benefit as compensation which is dependent on or in any way contingent upon the passage, defeat, or modification of: 1) any ordinance, resolution, action or decision of the County Commission; 2) any action, decision or recommendation of the PA or committee; or 3) any action, decision or recommendation of any PA/County personnel during the time period of the entire decision-making process regarding such action, decision or recommendation which foreseeably will be heard or reviewed by the Property Appraiser.

### **1.7 Collusion**

In accordance with Section 2-8.1.1 of the Code of Miami-Dade County, where two (2) or more related parties, as defined herein, each submit a proposal for any contract, such proposals shall be presumed to be collusive. The foregoing presumption may be rebutted by the presentation of evidence as to the extent of ownership, control and management of such related parties in preparation and submittal of such proposals. Related parties shall mean Proposer or the principals thereof which have a direct or indirect ownership interest in another Proposer for the same contract or in which a parent company or the principals thereof of one Proposer have a direct or indirect ownership interest in another Proposer for the same contract. Proposals found to be collusive shall be rejected. Proposers who have been found to have engaged in collusion may be considered non-responsible, and may be suspended or debarred, and any contract resulting from collusive bidding may be terminated for default.

### **1.8 Expedited Purchasing Program**

Pursuant to Ordinance 07-49, the County has created a pilot program for expedited purchasing, subject to terms and conditions as outlined in Section 2-8.1.6 of the Code of Miami-Dade County. The program shall be referred to as the Expedited Purchasing Program (EPP). Due to the expedited nature of PA projects issued under the EPP, participating vendors should anticipate a shortened solicitation timeline for responding. Technical, professional and legal staff may be used to determine best value as set forth in the solicitation documents without the need to utilize the formal Selection Committee process established by the PA. The Property Appraiser or designee's written recommendation to award a contract under the EPP shall be sufficient to commence the bid protest period and terminate the Cone of Silence. Any legislation contrary to the provisions of the EPP shall be deemed suspended or amended as necessary to give effect to the intent of this ordinance during its effective term.

### **1.9 Contract Measures**

This Solicitation includes contract measures for Miami-Dade County Certified Small Business Enterprises (SBE's) as follows.

**Set-aside:**

This Solicitation is set-aside for SBE's.

**Subcontractor Goal:**

\_\_\_\_\_ % SBE subcontractor goal is applicable. The purpose of a subcontractor goal is to have portions of the work under the prime contract performed by available subcontractors that are certified SBEs for contract values totaling not less than the percentage of the prime contract value set out in this Solicitation. Subcontractor goals may be applied to a contract when estimates made prior to solicitation advertisement identify the quality, quantity and type of opportunities in the contract and SBEs are available to afford effective competition in providing a percentage of these identified services. Proposers shall submit a completed Schedule of Intent Affidavit (Form SBD 504) at the time of proposal identifying all SBEs to be utilized to meet the subcontractor goal. The Schedule of Intent Affidavit shall specify the scope of work and commodity code the SBE will perform. The Schedule of Intent Affidavit constitutes a written representation by the Proposer that to the best of the Proposer's knowledge the SBEs listed are available and have agreed to perform as specified, or that the Proposer will demonstrate unavailability.

The participating SBE firms (or joint ventures) must have a valid Miami-Dade County SBE certification by the proposal submittal deadline of this Solicitation, as well as, meet all other requirements. Additional information regarding Miami-Dade County's Small Business Enterprise Program, including new amendments to the program, is available on the Small Business Development's website <http://new.miamidade.gov/business/business-development.asp>.

(If Selection Factor, use Section 4.4 and delete above section.)

**1.10 Minimum Qualifications**

Provide documentation that demonstrates Proposer's ability to satisfy all of the minimum qualification requirements. Proposers who do not meet the minimum qualification requirements or who fail to provide supporting documentation may be deemed non-responsive. The minimum qualification requirements for this Solicitation are:

Proposer must provide a minimum of three (3) references as evidence that Proposer has performed similar sizeable printing services for large scale governments or private institutions.

**Failure to comply with these requirements may result in bidder's proposal being considered non-responsive. Bidders may be given an opportunity to comply with the submittal requirement during the evaluation stages of the bidding process.**

**2.0 SCOPE OF SERVICES**

**Printing and Optional Mailing Services**

**2.1 Purpose**

It is the purpose of this Request for Proposals (RFP) to select a firm to provide printing and optional mailing services for the Miami-Dade County Office of the Property Appraiser (PA).

**2.2. Background**

The PA has the responsibility of notifying the businesses and citizens of Miami-Dade County (County) of property taxes due to the County. The primary method of providing that notification is by use of printed documents mailed through the U. S. Postal Service (USPS). The PA has multiple mailings each year and the majority are govern by statutory law, which may include certified mailing requirements.

**2.3 Mailing Projects**

Each mailing project may require various paper sizes and colors. Below is a list of all anticipated yearly mailing projects. Each mailing project includes (but may not be limited to):

Item No.1  
Residential Renewal Mailing  
Date: December 27th  
Quantity: 411,000

Job Name	Special Instructions	File Attachments
Option 1: Residential Renewal Mailing	Residential Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable side 1 (Front), Black</li> <li>• Static side 2 (Back), Black</li> </ul>	FINAL 2014 AUTOMATIC RESIDENTIAL RENEWAL RECEIPT – FRONT PAGE FINAL 2014 AUTOMATIC RESIDENTIAL RENEWAL RECEIPT – BACK PAGE
Option 2: Residential Renewal Mailing	11 x 17 folded to 8.5 x 11. Perforated. Once booklet is folded, order pages as follows: Page 1: English Renewal Receipt, Variable, Black Page 2: Renewal Information English, Static, Black Page 3: Spanish Renewal Receipt, Variable, Black Page 4: Renewal Information Spanish, Static, Black Booklet should be folded with English side superior	2014 ENGLISH AUTOMATIC RENEWAL RECEIPT_PAGE1 2014 ENGLISH RENEWAL INFORMATION_PAGE 2 2014 SPANISH AUTOMATIC RENEWAL RECEIPT_PAGE3 2014 SPANISH RENEWAL INFORMATION_PAGE4
Option 3: Residential Renewal Mailing	Residential Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable BOTH SIDES, Black</li> <li>• English Front, Spanish Back                             <ul style="list-style-type: none"> <li>○ Folded English side Superior</li> </ul> </li> </ul> Renewal Information Insert, 8.5x11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides                             <ul style="list-style-type: none"> <li>○ Folded English side superior</li> </ul> </li> </ul>	2014 AUTOMATIC RENEWAL RECEIPT _ENGLISH 2014 AUTOMATIC RENEWAL RECEIPT _SPANISH 2014 ENGLISH RENEWAL INFORMATION_FRONT 2014 SPANISH RENEWAL INFORMATION_BACK
Residential Renewal Fraud Insert	Fraud Insert, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides, Black, printed on blue paper</li> </ul>	FINAL 2014 Exemption Fraud Insert

Item No.2

**Institutional Renewal Mailing (RE)**

**Date: December 27th**

**Quantity: 7,170**

Job Name	Special Instructions	File Attachments
Option 1: Institutional Renewal Mailing (RE)	Institutional Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable side 1 (Front), Black</li> <li>• Static side 2 (Back), Black</li> </ul>	FINAL 2014 AUTOMATIC INSTITUTIONAL RENEWAL RECEIPT - FRONT PAGE FINAL 2014 AUTOMATIC INSTITUTIONAL RENEWAL RECEIPT - BACK PAGE
Option 2: Institutional Renewal Mailing (RE)	11 x 17 folded to 8.5 x 11, Perforated Once booklet is folded, order pages as follows:  Page 1: English Renewal Receipt, Variable, Black Page 2: Renewal Information English, Static, Black Page 3: Spanish Renewal Receipt, Variable, Black Page 4: Renewal Information Spanish, Static, Black  Booklet should be folded with English side Superior	2014 ENGLISH AUTOMATIC INST RENEWAL RECEIPT_PAGE1  2014 ENGLISH RENEWAL INFORMATION_PAGE2  2014 SPANISH AUTOMATIC INST RENEWAL RECEIPT_PAGE3  2014 SPANISH RENEWAL INFORMATION_PAGE4
Option 3: Institutional Renewal Mailing (RE)	Institutional Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable BOTH SIDES, Black</li> <li>• English Front, Spanish Back                             <ul style="list-style-type: none"> <li>○ Folded English side Superior</li> </ul> </li> </ul> Renewal Information Insert, 8.5x11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides                             <ul style="list-style-type: none"> <li>○ Folded English side superior</li> </ul> </li> </ul>	2014 AUTOMATIC INST RENEWAL RECEIPT_ENGLISH  2014 AUTOMATIC INST RENEWAL RECEIPT_SPANISH  2014 ENGLISH RENEWAL INFORMATION_FRONT  2014 SPANISH RENEWAL INFORMATION_BACK

Item No.3

**Institutional Renewal Mailing (TPP) (Currently handled by the County's IT Department.)**

**Date: December 27th**

**Quantity: 7,170**

Job Name	Special Instructions	File Attachments
Option 1: Institutional Renewal Mailing (TPP)	Institutional Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable side 1 (Front), Black</li> <li>• Static side 2 (Back), Black</li> </ul>	FINAL 2014 AUTOMATIC INSTITUTIONAL RENEWAL RECEIPT - FRONT PAGE  FINAL 2014 AUTOMATIC INSTITUTIONAL

<p>Option 2: Institutional Renewal Mailing (TPP)</p>	<p>11 x 17 folded to 8.5 x 11, Perforated Once booklet is folded, order pages as follows:</p> <p>Page 1: English Renewal Receipt, Variable, Black Page 2: Renewal Information English, Static, Black Page 3: Spanish Renewal Receipt, Variable, Black Page 4: Renewal Information Spanish, Static, Black</p> <p>Booklet should be folded with English side superior</p>	<p>RENEWAL RECEIPT - BACK PAGE</p> <p>2014 ENGLISH AUTOMATIC INST RENEWAL RECEIPT_PAGE1</p> <p>2014 ENGLISH RENEWAL INFORMATION_PAGE 2</p> <p>2014 SPANISH AUTOMATIC INST RENEWAL_RECEIPT_PAGES3</p> <p>2014 SPANISH RENEWAL INFORMATION_PAGE4</p>
<p>Option 3: Institutional Renewal Mailing (TPP)</p>	<p>Institutional Renewal Receipt, 8.5 x 11, 2 sided</p> <ul style="list-style-type: none"> <li>• Variable BOTH SIDES, Black</li> <li>• English Front, Spanish Back             <ul style="list-style-type: none"> <li>o Folded English side Superior</li> </ul> </li> </ul> <p>Renewal Information Insert, 8.5x11, 2 sided</p> <ul style="list-style-type: none"> <li>• Static both sides             <ul style="list-style-type: none"> <li>o Folded English side Superior</li> </ul> </li> </ul>	<p>2014 AUTOMATIC INST RENEWAL RECEIPT_ENGLISH</p> <p>2014 AUTOMATIC INST RENEWAL RECEIPT_SPANISH</p> <p>2014 ENGLISH RENEWAL INFORMATION_FRONT</p> <p>2014 SPANISH RENEWAL INFORMATION_BACK</p>

Item No.4  
**1<sup>st</sup> Courtesy Application Mailing**  
**Date: December 27th**  
**Quantity: 16,167**

Job Name	Special Instructions	File Attachments
<p>Courtesy Application Booklet</p>	<p>11 x 17 folded to 8.5 x 11, Perforated Once booklet is folded, order pages as follows:</p> <p>Page 1: Exemption Application (MDR-501), Page 1, Variable, Black Page 2: Exemption Application (MDR-501), Page 2, Static, Black Page 3: DR-501T (Transfer of Homestead Assessment Difference Application), Variable, Black Page 4: Blank page for Mailing Data, Variable, Black</p> <p>Booklet should be folded with the blank page with mailing superior (pg. 4), in order to see the mailing address through the envelope window.</p>	<p>FINAL COURTESY APPLICATION DR 501_PG 1 &amp; 2</p> <p>FINAL dr501t_PG3</p> <p>FINAL BLANK PAGE 4 FOR MAILING COURTESY APPLCIATION_PG 4</p>

Courtesy Application Cover Letter (1 <sup>st</sup> INSERT)	Courtesy Application Cover Letter, 8.5 x 11, 2 pages (Front and Back), Static, Black, folded English side superior	FINAL 2014 Property Tax Exemption Courtesy Letter_INSERT 1
Exemption Requirements and Locations (2 <sup>nd</sup> Insert)	Exemption Requirements and locations Insert: 8.5 x 11, 1 sided, Static, Black	FINAL 2014 COURTESY EXEMPTION REQUIREMENTS LOCATIONS_INSERT 2
Exemption Requirements (3 <sup>rd</sup> Insert)	Exemption Requirements Insert: 8.5 x 14, 2 sided (English and Spanish, folded, English side superior), Static, Black (printed on Blue Paper)	FINAL 2014 Exemption Requirements_INSERT 3

Item No.5

**Classification Letter No.1**

**Date: February 1st**

**Quantity: 8300**

Job Name	Special Instructions	File Attachments
Classification letter No.1	Classification Letter, 8.5 x 11, 2-sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Classification Letter_English and Spanish

Item No.6

**Sales Info Survey**

**Date: February 1st**

**Quantity: 800**

Job Name	Special Instructions	File Attachments
Sales Info Survey	Sales Info Survey, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Sales Info Survey_English and Spanish

Item No.7

**Wetland Letter**

**Date: February 1st**

**Quantity: 850**

Job Name	Special Instructions	File Attachments
Wetland Letter	Wetland Letter, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Wetland Letter_English and Spanish

Item No.8

**Trust Mailing**

**Date: February 14th**

**Quantity: 600**

Job Name	Special Instructions	File Attachments
Trust Mailing	Trust Letter, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black</li> </ul>	2014 Trust Letter_English and

	<ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul>	Spanish
Trust Mailing Insert	Trust Certificate Insert, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides, Black</li> <li>○ Folded English Side Superior</li> </ul>	2014 Trust Certificate_English and Spanish

Item No.9  
**Senior Automatic Mailing**  
**Date: February 14th**  
**Quantity: 45,000**

Job Name	Special Instructions	File Attachments
Option 1: Senior Citizen Automatic Renewal Mailing	Senior Citizen Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable side 1 (Front), Black</li> <li>• Static side 2 (Back), Black</li> </ul>	2014 AUTOMATIC SENIOR RENEWAL RECEIPT - FRONT PAGE  2014 ENGLISH RENEWAL INFORMATION_BACK PAGE
Option 2: Senior Citizen Automatic Renewal Mailing	11 x 17 folded to 8.5 x 11, Perforated Once booklet is folded, order pages as follows:  Page 1: English Renewal Receipt, Variable, Black Page 2: Renewal Information English, Static, Black Page 3: Spanish Renewal Receipt, Variable, Black Page 4: Renewal Information Spanish, Static, Black  Booklet should be folded with English side superior	2014 ENGLISH AUTOMATIC SENIOR RENEWAL RECEIPT_PAGE1  2014 ENGLISH RENEWAL INFORMATION_PAGE 2  2014 SPANISH AUTOMATIC SENIOR RENEWAL RECEIPT_PAGE3  2014 SPANISH RENEWAL INFORMATION_PAGE4
Option 3: Senior Citizen Automatic Renewal Mailing	Senior Citizen Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable BOTH SIDES, Black</li> <li>• English Front, Spanish Back                         <ul style="list-style-type: none"> <li>○ Folded English side Superior</li> </ul> </li> </ul> Renewal Information Insert, 8.5x11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides                         <ul style="list-style-type: none"> <li>○ Folded English side superior</li> </ul> </li> </ul>	2014 AUTOMATIC SENIOR RENEWAL RECEIPT _ENGLISH  2014 AUTOMATIC SENIOR RENEWAL RECEIPT _SPANISH  2014 ENGLISH RENEWAL INFORMATION_FRONT  2014 SPANISH RENEWAL INFORMATION_BACK
Optional: Fraud Insert	Fraud Insert, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides, Black, printed on blue paper</li> </ul>	FINAL 2014 Exemption Fraud Insert

**T&P Automatic Mailing**  
**Date: February 14, 2014**  
**Quantity: 200**

Job Name	Special Instructions	File Attachments
Option 1: T&P Automatic Renewal Mailing	T&P Automatic Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable side 1 (Front), Black</li> <li>• Static side 2 (Back), Black</li> </ul>	2014 AUTOMATIC T&P RENEWAL RECEIPT - FRONT PAGE 2014 ENGLISH RENEWAL INFORMATION_BACK PAGE
Option 2: T&P Automatic Renewal Mailing	11 x 17 folded to 8.5 x 11, Perforated Once booklet is folded, order pages as follows: Page 1: English Renewal Receipt, Variable, Black Page 2: Renewal Information English, Static, Black Page 3: Spanish Renewal Receipt, Variable, Black Page 4: Renewal Information Spanish, Static, Black Booklet should be folded with English side superior	2014 ENGLISH AUTOMATIC T&P RENEWAL RECEIPT_PAGE1 2014 ENGLISH RENEWAL INFORMATION_PAGE 2 2014 SPANISH AUTOMATIC T&P RENEWAL RECEIPT_PAGE3 2014 SPANISH RENEWAL INFORMATION_PAGE4
Option 3: T&P Automatic Renewal Mailing	T&P Automatic Renewal Receipt, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable BOTH SIDES, Black</li> <li>• English Front, Spanish Back                             <ul style="list-style-type: none"> <li>○ Folded English side Superior</li> </ul> </li> </ul> Renewal Information Insert, 8.5x11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides                             <ul style="list-style-type: none"> <li>○ Folded English side superior</li> </ul> </li> </ul>	2014 AUTOMATIC T&P RENEWAL RECEIPT_ENGLISH 2014 AUTOMATIC T&P RENEWAL RECEIPT_SPANISH 2014 ENGLISH RENEWAL INFORMATION_FRONT 2014 SPANISH RENEWAL INFORMATION_BACK
Optional: Fraud Insert	Fraud Insert, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Static both sides, Black, printed on blue paper</li> </ul>	FINAL 2014 Exemption Fraud Insert

**Item No.11**  
**2<sup>nd</sup> Courtesy Application Mailing**  
**Date: February 14, 2014**  
**Quantity: 6,000**

Job Name	Special Instructions	File Attachments
Courtesy Application Booklet	11 x 17 folded to 8.5 x 11, Perforated Once booklet is folded, order pages as follows: Page 1: Exemption Application (MDR-501), Page 1, Variable, Black	FINAL COURTESY APPLICATION DR 501_PG 1 & 2 FINAL

	<p>Page 2: Exemption Application (MDR-501), Page 2, Static, Black</p> <p>Page 3: DR-501T (Transfer of Homestead Assessment Difference Application), Variable, Black</p> <p>Page 4: Blank page for Mailing Data, Variable, Black</p> <p>Booklet should be folded with the blank page with mailing superior (pg. 4), in order to see the mailing address through the envelope window.</p>	<p>dr501t_PG3</p> <p>FINAL BLANK PAGE 4 FOR MAILING COURTESY APPLCIATION_PG 4</p>
Courtesy Application Cover Letter (1 <sup>st</sup> INSERT)	<p>Courtesy Application Cover Letter, 8.5 x 11, 2 pages (Front and Back), Static, Black, folded English side superior</p>	<p>FINAL 2014 Property Tax Exemption Courtesy Letter_INSERT 1</p>
Exemption Requirements and Locations (2 <sup>nd</sup> Insert)	<p>Exemption Requirements and locations Insert: 8.5 x 11, 1 sided, Static, Black</p>	<p>FINAL 2014 COURTESY EXEMPTION REQUIREMENTS LOCATIONS_INSE RT 2</p>
Exemption Requirements (3 <sup>rd</sup> Insert)	<p>Exemption Requirements Insert: 8.5 x 14, 2 sided (English and Spanish, folded English side superior), Static, Black (printed on Blue Paper)</p>	<p>FINAL 2014 Exemption Requirements_IN SERT 3</p>

Item No.12  
**Questionnaire Mailing**  
**Date: February 14, 2014**  
**Quantity: 3,700**

Job Name	Special Instructions	File Attachments
Questionnaire Mailing	<p>11 x 17 folded to 8.5 x 11, Perforated</p> <p>Once booklet is folded, order pages as follows:</p> <p>Page 1: English Cover Letter, Variable, Black</p> <p>Page 2: Spanish Cover Letter, Variable, Black</p> <p>Page 3: English Questionnaire, Variable, Black</p> <p>Page 4: Spanish Questionnaire, Variable, Black</p> <p>Booklet should be folded with Cover letter English side superior</p>	<p>2014 HX QUESTIONNAIRE LETTER_English and Spanish</p> <p>2014 HX Questionnaire_English and Spanish</p>
Optional: Fraud Insert	<p>Fraud Insert, 8.5 x 11, 2 sided</p> <ul style="list-style-type: none"> <li>• Static both sides, Black, printed on blue paper</li> </ul>	<p>FINAL 2014 Exemption Fraud Insert</p>

Item No.13  
**Income Request Letter**  
**Date: March 1st**  
**Quantity: 32,000**

Job Name	Special Instructions	File Attachments
Income Request Letter	Income Request Letter, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Income Request Letter_English and Spanish

Item No.14  
**Waiver Letter**  
**Date: April 1st**  
**Quantity: 74,000**

Job Name	Special Instructions	File Attachments
Waiver Letter	Waiver Letter, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Waiver Letter_English and Spanish

Item No.15  
**General Denial Mailing (Certified)**  
**Date: Between April and July**  
**Quantity: 9,000**

Job Name	Special Instructions	File Attachments
General Denial Mailing (Certified)	11 x 17 folded in half to 8.5 x 11 and then folded to fit into #10 envelope  Once booklet is folded, order pages as follows: Page 1: Blank page for mailing information and certified number Page 2: English Cover Letter, Variable, Black Page 3: Spanish Cover Letter, Variable, Black Page 4: Blank back page stating this page intentionally left blank  Booklet should be folded with the blank mailing info page superior (pg. 1)	

Item No.16  
**Co-Applicant Denial Mailing (Certified)**  
**Date: Between April and July**  
**Quantity: 500**

Job Name	<u>Special Instructions</u>	<u>File Attachments</u>
Co-Applicant Denial Mailing (Certified)	<p>11 x 17 folded in half to 8.5 x 11 and then folded to fit into #10 envelope</p> <p>Once booklet is folded, order pages as follows:                      Page 1: Blank page for mailing information and certified number                      Page 2: English Cover Letter, Variable, Black                      Page 3: Spanish Cover Letter, Variable, Black                      Page 4: Blank back page stating this page intentionally left blank</p> <p>Booklet should be folded with the blank mailing info page superior (pg. 1)</p>	

Item No.17  
**Port Denial Mailing (Certified)**  
Date: Between April and July  
Quantity: 3,500

Job Name	<u>Special Instructions</u>	<u>File Attachments</u>
Port Denial Mailing (Certified)	<p>11 x 17 perforated and folded to fit into #10 envelope</p> <p>Once booklet is folded, order pages as follows:                      Page 1: Blank page for mailing information and certified number                      Page 2: English Cover Letter, Variable, Black                      Page 3: Spanish Cover Letter, Variable, Black                      Page 4: Port Denial Form, Variable, Black</p> <p>Booklet should be folded with the blank mailing info page superior (pg. 1)</p>	

Item No.18  
**Institutional Denial Mailing (Certified)**  
Date: Between April and July  
Quantity: 100

Job Name	<u>Special Instructions</u>	<u>File Attachments</u>
Institutional Denial Mailing (Certified)	<p>11 x 17 folded in half to 8.5 x 11 and then folded to fit into #10 envelope</p> <p>Once booklet is folded, order pages as follows:                      Page 1: Blank page for mailing information and certified number                      Page 2: English Cover Letter, Variable, Black</p>	

	Page 3: Spanish Cover Letter, Variable, Black Page 4: Blank back page stating this page intentionally left blank  Booklet should be folded with the blank mailing info page superior (pg. 1)	
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Item No.19  
**Investigation Denial Mailing (Certified)**  
Date: Between April and July  
Quantity: 600

Job Name	Special Instructions	File Attachments
Investigation Denial Mailing (Certified)	Investigation Denial Letter – 8.5 x 11, 2 pages (1 page front and back), Variable, Black Certified	

Item No. 20  
**50 Denial Mailing (Non-Certified)**  
Date: Between April and July  
Quantity: 2,000

Job Name	Special Instructions	File Attachments
50 Denial Mailing (Non-Certified)	50 Denial Letter – 8.5 x 11, 2 pages (1 page front and back), Variable, Black Non-Certified	

Item No.21  
**57 Denial Mailing (Non-Certified)**  
Date: Between April and July  
Quantity: 3,000

Job Name	Special Instructions	File Attachments
57 Denial Mailing (Non-Certified)	57 Denial Letter – 8.5 x 11, 2 pages (1 page front and back), Variable, Black Non-Certified	

Item No. 22  
**Late Application Non-Approval Mailing (Non-Certified)**  
Date: Between April and July  
Quantity: 900

Job Name	Special Instructions	File

		Attachments
Late Application Non-Approval Mailing (Non-Certified)	Late Application non-Approval Letter – 8.5 x 11, 2 pages (1 page front and back), Variable, Black Non-Certified	

Item No.23

**Exchange of Information Letter**

**Date: May 1st**

**Quantity: 1,400**

Job Name	Special Instructions	File Attachments
Exchange of Information Letter	Exchange of Information Letter, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Exchange of Information Letter_English and Spanish

Item No. 24

**Multiple Year Filings**

**Date: June 1st**

**Quantity: 36,000**

Job Name	Special Instructions	File Attachments
Multiple Year Filings	Multiple Year Filings, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Multiple Year Filings_English and Spanish

Item No. 25

**Classification Letter No.2**

**Date: July 1st**

**Quantity: 3100**

Job Name	Special Instructions	File Attachments
Classification Letter No.2	Classification Letter, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Classification Letter_English and Spanish

Item No.26

**Wetland Letter No.2**

**Date: July 1st**

**Quantity: 600**

Job Name	Special Instructions	File Attachments
Wetland Letter No. 2	Wetland Letter, 8.5 x 11, 2 sided	2014 Wetland

	<ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	Letter_English and Spanish
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Item No. 27

**NCOA Letter**

**Date: July 1st**

**Quantity: 9200**

Job Name	Special Instructions	File Attachments
NCOA Letter	NCOA Letter, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 NCOA Letter_English and Spanish

Item No.28

**Informal Assessment Review**

**Date: August 1st**

**Quantity: 37,000**

Job Name	Special Instructions	File Attachments
Informal Assessment Review	Informal Assessment Review, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 Informal Assessment Review_English and Spanish

Item No.29

**TRIM Guide**

**Date: August 1st**

**Quantity: 1,000,000**

Job Name	Special Instructions	File Attachments
TRIM Guide	TRIM Guide, 8.5 x 14, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 TRIM Guide_English and Spanish

Item No.30

**TRIM Insert**

**Date: August 1st**

**Quantity: 855,000**

Job Name	Special Instructions	File Attachments
TRIM Insert	TRIM Insert, 8.5 x 11, 2 sided <ul style="list-style-type: none"> <li>• Variable both sides, Black                             <ul style="list-style-type: none"> <li>○ Folded English Side Superior</li> </ul> </li> </ul>	2014 TRIM Insert_English and Spanish

Item No.31

**Various Envelopes**

**Date: Year Round**

**Quantity: small quantities or as needed**

Job Name	Special Instructions	File Attachments
Various Envelopes	No.10 Window Envelopes	

## 2.4 Tasks

### A. GENERAL:

The selected Proposer shall provide printing and optional mailing services for all printing described on Section 2.3 (above). Mailing of above items is time sensitive. Exact mailing date for each submitted job will be provided by OT/COR at time of transmission of information. Ample time will be provided by OT/COR between transmission and mail date. Submitted job is processed, printed and mailed (if selected Proposer is designated to provide mailing services) with single items mailed out efficiently and multi-items mailed correlated by zip code, address and name correctly.

The selected Proposer shall be capable of consolidating two (2) sets of data files into one (1) notice and/or consolidating two (2) sets of notices into one envelope for mailing. Selected

Proposer shall be responsible for and agree to furnish all labor, materials, equipment, quality control procedures and supervision required for completion in a superior and professional manner. The PA reserves right to view completed sample of each type of mailing prior to the printing of such mailings.

### B. DATA PROCESSING SERVICES

The selected Proposer shall provide, but not limited to, the following:

#### 1. Data File Manipulation:

- a. receive and send data files electronically, via email, FTP, or other means;
- b. perform simple merging of data files or more complex by matching on data field;
- c. merge multiple PDF files into one;
- d. split a single PDF file into many, as defined;
- e. manipulate the data by removing duplicates, or data identified;
- f. name or rename input and output data files;
- g. process data received through a Coding Accuracy Support System (CASS) to certify the list and code of each addressable mailing with the correct carrier route, zip code and Delivery Point Barcode (DPBC);
- h. process data received through USPS National Change of Address NCOA and report the findings.
- i. provide, at no charge, minor design changes as requested, such as:
  - i. Applying justification, center, left, or right
  - ii. Truncating characters/numbers at the front or back end;
  - iii. Removing leading or trailing zeroes or characters.
- j. map input fields to locations on the letter, or forms.

#### 2. Printing Services:

- a. specify paper stock (i.e. color, weight, font, font size, etc.) requirements;
- b. specify alternative print media other than paper ( i.e. vinyl commonly referred to as wraps );
- c. print envelope with and without address widows;
- d. specify ink requirements;
- e. specify for folding and stuffing requirements;

- f. specify format (i.e. single/double sided, booklet, perforation, etc);
- g. specify data from a file(s) which includes variable information;
- h. specify Optical Character Recognition (OCR) requirements fonts for BAR codes and UPC codes as required;

3. Rendering Electronic Output Files

- a. specify output data files (PDF, JPEG, PNG, TIFF, etc.) requirements;
- b. specify resolution or max size;
- c. specify color, black/white, or gray scale;
- d. specify data from a file(s) which to include variable information;
- e. specify the file "name" based on a static name, as indicated in the source data file or as provided;
- f. specify the file "name" based on static plus variable data, as indicated in the source data file or as provided, (i.e. each file 2014 Institutional Renewal Receipt – *folio\_number*, where the *folio\_number* is variable data that would be derived from the source data file.)
- g. specify PDF requirements
  - i. One file per addressee, even if it's a multi-page mailing
  - ii. One file for the entire mailing,
  - iii. Searchable or not searchable

4. Electronic Workflow Processing

It is highly desirable that the selected Proposer provide an Internet/browser based application with project visibility, control, and tracking, including, but not limited to:

- a. initiate, monitor, and track a project through a browser based application;
- b. have visibility to the state of the project in the workflow;
- c. submit and view attachments;
- d. review deliverables online and approve or deny;

C. SAMPLES

Actual Sample documents for viewing are available to Proposers. Proposers may view samples at the PA Purchasing Unit, 114 NW 1<sup>st</sup> Street, Suite 710, Miami, FL 33128. As an alternate, proposers may provide the Purchasing Unit with a postage-prepaid, self-addressed envelope, and the samples can be mailed. Proposers must allow sufficient time for the samples to be assembled and mailed; the PA shall not be responsible for any delays in providing the samples.

The samples indicate the source files provided by PA for the suggested formats for each type of correspondence required. The PA will consider reformatted configurations to fit 8½" x 11" paper. Selected Proposer will provide, at no charge, minor design changes as requested by PA. Input fields are mapped to the sample forms. Where input lengths exceed output lengths, the logic should be as follows:

- (1) for alphanumeric fields, left justify and truncate and
- (2) for numeric fields, right justify and remove leading zeroes. As selected Proposer, equipment and capability may vary, Proposers should regard the sample outputs as guidelines, and provide responses that include samples to be produced. Font types and sizes may vary, but font should be uniform within a section of

correspondence. OCRV Scan Line must be in exact position for items having scan line using the standardized OCR A and/or B fonts. While the samples provided can be derived from the inputs without processing, the PA would prefer a Proposer who can demonstrate the ability to accumulate totals, aggregate on field value change and control format based on field contents and types.

#### D. SUPPLIES

Selected Proposer shall provide:

1. Sufficient stationary (type as noted on 'Pricing Sheet') on which to print transmitted job.
2. Mailing window envelope with appropriate return address. This may be a customized envelope. Special wording may be included on back of envelope on instruction from PA.
3. Return windowless envelope with three lines for return address and appropriate mailing address, as designated by PA. This may be a customized envelope. Special wording may be included in space below return address, as designated by PA.
4. The printing of any inserts as designated by PA which are to be included in the mailing. Content and paper color specifications to be provided by PA.
5. Necessary equipment and supplies for completion of each submitted job in time frame provided. PA may provide pre-printed inserts for designated submitted jobs. PA shall not be charged for supplies not related to submitted jobs. Selected Proposer shall be responsible for the cost of supplies until the supplies are used for a submitted job. Record of costs of supplies and postage usage shall be submitted to PA each month.

#### E. QUALITY

Every notice shall be printed and mailed with the highest level of quality. Selected Proposer shall implement safeguards and checks to avoid double notices, incorrect addresses, improper dates and other erroneous data. Any submitted job not presentable, as determined by PA, or having incorrect information, not supplied by the PA, shall be reprinted and mailed at selected Proposer's expense. Date for this mailing to be determined by PA.

#### F. SECURITY

The selected Proposer shall define and demonstrate security procedures that are in place regarding transmission and safety of confidential information. The PA requires both network and physical security of information. PA's information, statements and documents are to be made available only to the Selected Proposer and parties approved by the PA. The Selected Proposer shall demonstrate and document that these security measures are in place. No data shall be transmitted without consent of the PA. Selected Proposer shall not use, disperse or sell information provided by PA for printing and mailing of submitted jobs. Selected Proposer shall agree to and comply with a confidentiality agreement. The selected Proposer to provide a hosted web-based, on-line Electronic Bill Presentment and Payment solution (EBPP) with demonstrated capability up to 256-bit encryption, 4-layer security, password protection login, bill viewing and storage and allow functionality for various customer payment options and account maintenance.

#### G. DISASTER RECOVERY PROCEDURES

The selected Proposer shall have a demonstrated disaster recovery program (hardware and software) addressed in their proposal that ensures prompt and complete recovery. The detail of this plan shall include off-site storage of information, data recovery procedures, timing in which backup will occur, equipment failure process, alternate FTP sites, etc. The Proposer shall detail their solution to ensure no significant interruption of

service and any cost(s) that will be charged to the PA for the availability of these services. Disaster recovery procedures require the same security levels as noted above (Section "I", Security).

### **2.5 Optional Folding and Postal Services**

The Selected Proposer (if assigned to provide the optional folding and mailing services) shall:

1. The PA will provide USPS postage account number. Maintain the necessary postal equipment to affix postage to each item.
2. Maintain the necessary software essential to receive the largest postage discounts and shall maintain up-to-date knowledge to all United States mail regulations regarding First Class postage.
3. Utilize bar coding and arrange/sort the mail to qualify for the lowest postage rate consistent with the United States Postal Service standards.
4. Maintain the necessary documentation and equipment to track the submitted job from the time transmission from PA to delivery to the United States Postal Service.
6. Notify PA, within a reasonable time frame, when mail exceeds postal weight requirements with estimated postal charges to be incurred when mailing.
7. Be responsible for the coordination, required preparation and designated business day delivery of the PA's billing statements to the United States Postal Service.

#### **F. HANDLING (if awarded folding and mailing services)**

The selected Proposer shall have the ability to print and handle all jobs, as noted above. Selected Proposer shall fold, perforate and insert notices with a return envelope, and any inserts as directed by the PA. The Selected Proposer shall seal the envelope, insure the address is visible through the window envelope, meter the envelope with the appropriate postage, sort, bundle, tray and deliver to the United States Postal Service on mail date designated by the PA.

## **3.0 RESPONSE REQUIREMENTS**

### **3.1 Submittal Requirements**

In response to this Solicitation, Proposer should **return the entire completed Proposal Submission Package** (see attached). Proposers should carefully follow the format and instructions outlined therein. All documents and information must be fully completed and signed as required.

The proposal shall be written in sufficient detail to permit the PA to conduct a meaningful evaluation of the proposed services. However, overly elaborate responses are not requested or desired.

## **4.0 EVALUATION PROCESS**

### **4.1 Review of Proposals for Responsiveness**

Each proposal will be reviewed to determine if the proposal is responsive to the submission requirements outlined in this Solicitation. A responsive proposal is one which follows the requirements of this Solicitation, includes all documentation, is submitted in the format outlined in this Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in the proposal being deemed non-responsive.

**4.2 Evaluation Criteria**

Proposals will be evaluated by a Review Team which will evaluate and rank proposals on criteria listed below. The Review Team will be comprised of appropriate PA personnel and members of the community, as deemed necessary, with the appropriate experience and/or knowledge, striving to ensure that the Review Team is balanced with regard to both ethnicity and gender. The criteria are itemized with their respective weights for a maximum total of one hundred (100) points per Review Team member.

<u>Technical Criteria</u>	<u>Points</u>
1. Proposer's relevant experience, qualifications, and past performance in providing printing services.	35
2. Relevant experience and qualifications of key personnel, including key personnel of subcontractors, that will be assigned to this project, and experience and qualifications of subcontractors	20
3. Proposer's approach to providing the services requested in this Solicitation	25
<u>Price Criteria</u>	<u>Points</u>
4. Proposer's proposed price	20

**4.3 Oral Presentations**

Upon completion of the technical criteria evaluation indicated above, rating and ranking, the Review Team may choose to conduct an oral presentation with the Proposer(s) which the Review Team deems to warrant further consideration based on, among other considerations, scores in clusters and/or maintaining competition. (See **Form A-2** regarding registering speakers in the proposal for oral presentations.) Upon completion of the oral presentation(s), the Review Team will re-evaluate, re-rate and re-rank the proposals remaining in consideration based upon the written documents combined with the oral presentation.

**4.4 Selection Factor**

This Solicitation includes a selection factor for Miami-Dade County Certified Small Business Enterprises (SBE's) as follows. A SBE/Micro Business Enterprise is entitled to receive an additional ten percent (10%) of the total technical evaluation points on the technical portion of such Proposer's proposal. An SBE/Micro Business Enterprise must be certified by Small Business Development for the type of goods and/or services the Proposer provides in accordance with the applicable Commodity Code(s) for this Solicitation. For certification information contact Small Business Development at (305) 375-2378 or access <http://new.miamidade.gov/business/business-development.asp>. The SBE/Micro Business Enterprise must be certified by proposal submission deadline, at contract award, and for the duration of the contract to remain eligible for the preference. Firms that graduate from the SBE program during the contract may remain on the contract.

**OR**

A Selection Factor is not applicable to this Solicitation.

**OR**

*(If no points are assigned to evaluation criteria, include the following in addition to above paragraph):*

Whenever there are two best ranked proposals that are substantially equal and only one of the two so ranked proposals is submitted by a Proposer entitled to a selection factor, the selection factor shall be the deciding factor for award.

**4.5 Local Certified Service-Disabled Veteran's Business Enterprise Preference**

This Solicitation includes a preference for Miami-Dade County Local Certified Service-Disabled Veteran Business Enterprises in accordance with Section 2-8.5.1 of the Code of Miami-Dade County. A VBE is entitled to receive an additional five percent (5%) of the total technical evaluation points on the technical portion of such Proposer's proposal. If a Miami-Dade County Certified Small Business Enterprise (SBE) measure is being applied to this Solicitation, a VBE which also qualifies for the SBE measure shall not receive the veteran's preference provided in this section and shall be limited to the applicable SBE preference.

**4.6 Price Evaluation**

After the evaluation of the technical proposal, in light of the oral presentation(s) if necessary, the PA will evaluate the price proposals of those Proposers remaining in consideration.

The price proposal will be evaluated subjectively in combination with the technical proposal, including an evaluation of how well it matches Proposer's understanding of the PA's needs described in this Solicitation, the Proposer's assumptions, and the value of the proposed services. The pricing evaluation is used as part of the evaluation process to determine the highest ranked Proposer. The PA reserves the right to negotiate the final terms, conditions and pricing of the contract as may be in the best interest of the County.

**4.7 Local Preference**

The evaluation of competitive solicitations is subject to Section 2-8.5 of the Miami-Dade County Code, which, except where contrary to federal or state law, or any other funding source requirements, provides that preference be given to local businesses (see **Form A-4**). If, following the completion of final rankings by the Review Team, a non-local Proposer is the highest ranked responsive and responsible Proposer, and the ranking of a responsive and responsible local Proposer is within 5% of the ranking obtained by said non-local Proposer, then the Review Team will recommend that a contract be negotiated with said local Proposer.

**4.8 Negotiations**

The PA may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Proposer's best terms from a monetary and technical standpoint.

The Review Team will evaluate, score and rank proposals, and submit the results of their evaluation to the Property Appraiser or designee with their recommendation. The Property Appraiser or designee will determine with which Proposer(s) the PA shall negotiate, if any, taking into consideration the Local Preference Section above. In his sole discretion, the Property Appraiser or designee may direct negotiations with the highest ranked Proposer, negotiations with multiple Proposers, or may request best and final offers.

Notwithstanding the foregoing, if the PA and said Proposer(s) cannot reach agreement on a contract, the County reserves the right to terminate negotiations and may, at the County Mayor's or designee's discretion, begin negotiations with the next highest ranked Proposer(s). This process may continue until a contract acceptable to the PA has been executed or all proposals are rejected. No Proposer shall have any rights against the PA arising from such negotiations or termination thereof.

Any Proposer recommended for negotiations shall complete a Collusion Affidavit, in accordance with Sections 2-8.1.1 of the Miami-Dade County Code. (If a Proposer fails to submit the required Collusion Affidavit, said Proposer shall be ineligible for award.)

Any Proposer recommended for negotiations may be required to provide to the County:

- a) Its most recent certified business financial statements as of a date not earlier than the end of the Proposer's preceding official tax accounting period, together with a statement in writing, signed by a duly authorized representative, stating that the present financial condition is materially the same as that shown on the balance sheet and income statement submitted, or with an explanation for a material change in the financial condition. A copy of the most recent business income tax return will be accepted if certified financial statements are unavailable.

- b) Information concerning any prior or pending litigation, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the Proposer, any of its employees or subcontractors is or has been involved within the last three years.

**4.9 Contract Award**

Any contract, resulting from this Solicitation, will be submitted to the Property Appraiser or designee for approval. All Proposers will be notified in writing when the Property Appraiser or designee makes an award recommendation. The Contract award, if any, shall be made to the Proposer whose proposal shall be deemed by the PA to be in the best interest of the County. Notwithstanding the rights of protest listed below, the PA's decision of whether to make the award and to which Proposer shall be final.

**4.10 Rights of Protest**

A recommendation for contract award or rejection of all proposals may be protested by a Proposer in accordance with the procedures contained in Sections 2-8.3 and 2-8.4 of the County Code, as amended, and as established in Implementing Order No. 3-21.

**5.0 TERMS AND CONDITIONS**

The anticipated form of agreement is attached. The terms and conditions summarized below are of special note and can be found in their entirety in the agreement:

**a) Vendor Registration**

Prior to being recommended for award, the Proposer shall complete a Miami-Dade County Vendor Registration Package. Effective June 1, 2008, the new Vendor Registration Package, including a Uniform Affidavit Packet (Affidavit form), must be completed. The Vendor Registration Package, including all affidavits can be obtained by downloading from the website at <http://www.miamidade.gov/procurement/vendor-registration.asp> or from the Vendor Assistance Unit at 111 N.W. 1st Street, 13th Floor, Miami, FL. The recommended Proposer shall affirm that all information submitted with its Vendor Registration Package is current, complete and accurate, at the time they submitted a response to the Solicitation, by completing an Affirmation of Vendor Affidavit form.

**b) Insurance Requirements**

The Contractor shall furnish to the County, Internal Services Department, Procurement Management Division, prior to the commencement of any work under any agreement, Certificates of Insurance which indicate insurance coverage has been obtained that meets the stated requirements.

**c) Inspector General Reviews**

According to Section 2-1076 of the Code of Miami-Dade County, as amended by Ordinance No. 99-63, Miami-Dade County has established the Office of the Inspector General which may, on a random basis, perform audits on all PA contracts, throughout the duration of said contracts, except as otherwise indicated. The cost of the audit, if applicable, shall be one quarter (1/4) of one (1) percent of the total contract amount and the cost shall be included in any proposed price. The audit cost will be deducted by the PA from progress payments to the Contractor, if applicable.

**6.0 ATTACHMENTS**

- Form of Agreement
- Proposal Submission Package

FORM B-1

**Price Proposal Schedule – Printing Services and Optional Mailing Services**

The Proposer's price shall be submitted on this Form B-1 "Price Proposal Schedule", and in the manner stated herein. Proposer is requested to fill in the applicable blanks on this form.

**A. PROPOSED PRICE STRUCTURE:**

The Proposer shall state its proposed price (per project) for providing all services as stated in Section 2.0, Scope of Services (except Section 2.8, Optional Services, which is provided for below in Section B) as follows:

**1. Printing Services**

- (1) To determine total printing pages and instructions per mailing project, proposers will need to review Section 2.2, Mailing Projects.
- (2) Notwithstanding the Proposer's Total Proposed Fee, payment to the selected Proposer shall be based on the actual print job assigned by the PA.
- (3) Quoted Print Job fees shall be all-inclusive. No "add-on" charges for services shall be accepted.
- (4) Fees shall not be adjusted at any time during the initial Contract term unless the PA requests and agrees to contractual changes.
- (5) All prices shall be guaranteed for the initial five year term.
- (6) Proposed prices in Section A will be used to determine the price points for the Price criterion as indicated in Section 4.2 of this Solicitation.
- (7) Proposer's price proposal may not be contingent on any assumptions or proposed restrictions. Any price proposal that is conditioned may be deemed non-responsive.
- (8) Any future printing projects not listed below will be submitted to the selected Proposer for a price quote.

**NOTE: When pricing the print job projects below, Proposers need to refer to Section 2.2, Mailing Projects as a reference. Section 2.2 includes a breakdown of each project. If a project describes more than one Option, Proposers shall submit pricing for Option No. 1 ONLY.**

Item No.	Print Job Projects	Estimated Mailings	Total Price Per Printing Project
1	Residential Renewal Mailing	411,000	\$
2	Institutional Renewal Mailing (RE)	7,170	\$
3	Institutional Renewal Mailing (TPP)	7,170	\$
4	Courtesy Application Mailing	16,167	\$
5	Classification Letter No.1	8,300	\$
6	Sales Info Survey	800	\$
7	Wetland Letter	850	\$
8	Trust Mailing	600	\$
9	Senior Automatic Mailing	45,000	\$
10	T&P Automatic Mailing	200	\$
11	2 <sup>nd</sup> Courtesy Application Mailing	6,000	\$
12	Questionnaire Mailing	3,700	\$
13	Income Request Letter	32,000	\$
14	Waiver Letter	74,000	\$
15	General Denial Mailing (Certified)	9,000	\$
16	Co-Applicant Denial Mailing (Certified)	500	\$
17	Port Denial Mailing (Certified)	3,500	\$
18	Institutional Denial Mailing	100	\$
19	Investigation Denial Mailing (Certified)	600	\$
20	50 Denial Mailing (Non-Certified)	2,000	\$
21	57 Denial Mailing (Non-Certified)	3,000	\$
22	Late Application Non-Approval Mailing (Non-Certified)	900	\$
23	Exchange of Information Letter	1,400	\$
24	Multiple Year Filings	36,000	\$
25	Classification Letter No.2	3,100	\$
26	Wetland Letter No.2	600	\$
27	NGOA Letter	9,200	\$
28	Informal Assessment Review	37,000	\$
29	TRIM Guide	1,000,000	\$
30	TRIM Insert	855,000	\$
31	Various Envelopes	5000	\$
	<b>TOTAL PRICE (Items 1-31)</b>		<b>\$</b>

Item No.	Individual Printing Charges	Price Per Page
1	Letter size paper (8.5 X 11), Black	\$
2	Letter size paper double sided, Black	\$
3	Letter size paper (color paper)	\$
4	Letter size paper (color ink printing)	\$
5	Legal size paper (8.5 X 14), Black	\$
6	Legal size paper double sided, Black	\$
7	Legal size paper (color paper)	\$
8	Legal size paper (color ink printing)	\$
9	11 X17 size paper, Black	\$
10	11 X17 size paper, variable for booklet, Black	\$
11	11 X17 size paper (perforated), Black	\$
12	11 X17 size paper (perforated and folded to 8.5 X 11), Black	\$
13	11 X17 size paper (color paper)	\$
14	11 X17 size paper (color ink printing)	\$

**B. OPTIONAL FOLDING & MAILING SERVICES**

At Proposer's option, provide Proposer's rate structure for utilizing folding and mailing services, should the PA be interested in availing this service to participants (see Section 2.5, Scope of Services).

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Item No.	Mailing Services	Estimated Mailings	Total Price Per Mailing Project
1	Residential Renewal Mailing	411,000	\$
2	Institutional Renewal Mailing (RE)	7,170	\$
3	Institutional Renewal Mailing (TPP)	7,170	\$
4	Courtesy Application Mailing	16,167	\$
5	Classification Letter No.1	8,300	\$
6	Sales Info Survey	800	\$
7	Wetland Letter	850	\$
8	Trust Mailing	600	\$
9	Senior Automatic Mailing	45,000	\$
10	T&P Automatic Mailing	200	\$
11	2 <sup>nd</sup> Courtesy Application Mailing	6,000	\$
12	Questionnaire Mailing	3,700	\$
13	Income Request Letter	32,000	\$
14	Waiver Letter	74,000	\$
15	General Denial Mailing (Certified)	9,000	\$
16	Co-Applicant Denial Mailing (Certified)	500	\$
17	Port Denial Mailing (Certified)	3,500	\$
18	Institutional Denial Mailing	100	\$
19	Investigation Denial Mailing (Certified)	600	\$
20	50 Denial Mailing (Non-Certified)	2,000	\$
21	57 Denial Mailing (Non-Certified)	3,000	\$
22	Late Application Non-Approval Mailing (Non-Certified)	900	\$
23	Exchange of Information Letter	1,400	\$
24	Multiple Year Filings	36,000	\$
25	Classification Letter No.2	3,100	\$
26	Wetland Letter No.2	600	\$
27	NCOA Letter	9,200	\$
28	Informal Assessment Review	37,000	\$
29	TRIM Guide	1,000,000	\$
30	TRIM Insert	855,000	\$

**Note:**

This section (B) is for informational and negotiations purposes only and will not be utilized for scoring purposes.

## Proposer Information

### Minimum Qualification Requirements

1. Provide documentation that demonstrates Proposer's ability to satisfy all of the minimum qualification requirements. Proposers who do not meet the minimum qualification requirements or who fail to provide supporting documentation may be deemed non-responsive. The minimum qualification requirements for this Solicitation are:

Proposer must provide a minimum of three (3) references as evidence that Proposer has performed similar sizeable printing services for large scale governments or private institutions.

**Failure to comply with these requirements may result in bidder's proposal being considered non-responsive. Proposers may be given an opportunity to comply with the submittal requirement during the evaluation stages of the bidding process.**

### Proposer's Experience and Past Performance

2. Describe the Proposer's past performance and experience and state the number of years that the Proposer has been in existence, the current number of employees, and the primary markets served.
3. Provide a detailed description of comparable contracts (similar in scope of services to those requested herein) which the Proposer has either ongoing or completed within the past three years. The description should identify for each project: (i) client, (ii) description of work, (iii) total dollar value of the contract, (iv) dates covering the term of the contract, (v) client contact person and phone number, (vi) statement of whether Proposer was the prime contractor or subcontractor, and (vii) the results of the project. Where possible, list and describe those projects performed for government clients or similar size private entities (excluding any work performed for the County).
4. List all contracts which the Proposer has performed for Miami-Dade County. The County will review all contracts the Proposer has performed for the County in accordance with Section 2-8.1(g) of the Miami-Dade County Code, which requires that "a Bidder's or Proposer's past performance on County Contracts be considered in the selection of Consultants and Contractors for future County Contracts." As such the Proposer must list and describe all work performed for Miami-Dade County and include for each project: (i) name of the County Department which administers or administered the contract, (ii) description of work, (iii) total dollar value of the contract, (iv) dates covering the term of the contract, (v) County contact person and phone number, (vi) statement of whether Proposer was the prime contractor or subcontractor, and (vii) the results of the project.

### Key Personnel and Subcontractors Performing Services

5. Provide an organization chart showing all key personnel, including their titles, to be assigned to this project. This chart must clearly identify the Proposer's employees and those of the subcontractors or subconsultants and shall include the functions to be performed by the key personnel. All key personnel includes all partners, managers, seniors and other professional staff that will perform work and/or services in this project.
6. List the names and addresses of all first tier subcontractors, and describe the extent of work to be performed by each first tier subcontractor. Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of the subcontractors who will be assigned to this project.

## Proposer Information

7. Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of all key personnel, including those of subcontractors, who will be assigned to this project.
8. Provide resumes, if available with job descriptions and other detailed qualification information on all key personnel who will be assigned to this project, including any key personnel of subcontractors.

**Note: After proposal submission, but prior to the award of any contract issued as a result of this Solicitation, the Proposer has a continuing obligation to advise the County of any changes, intended or otherwise, to the key personnel identified in its proposal.**

### Proposed Approach to Providing the Services

9. For the PA's office, provide a brief summary of Proposer's understanding of the responsibilities should Proposer be awarded this contract. Included should be a summary of the services to be provided by Proposer, and examples of how Proposer has been flexible in fulfilling similar client relationships.
10. Describe Proposer's specific project plan and procedures to be used in providing the services in the Scope of Services (**see Section 2.0**).
11. Relative to Proposer's geographic location, how does Proposer envision providing support to the PA?
12. Describe the resources (equipment) that Proposer has to fulfill the requirements of this contract.
  - a. Data processing
  - b. Printing
  - c. Postal (**optional**)
13. Describe proposer's capability to process data, once retrieved from PA, through a CASS to certify the list and code of each record with carrier route, zip code plus four and DPBC.
14. Describe how Proposer will standardize records?
15. What security procedures will Proposer utilize in the performance of these services?
16. Does Proposer have the capability to accumulate totals, aggregate on field value change and control format based on field contents and types?
17. What processes and procedures does Proposer utilize to ensure quality?
18. Describe if Proposer has an internet-based project visibility, control and tracking system. If the answer is yes, is any special hardware or software required for PA to utilize Proposer's web-based production control system?
19. What disaster recovery procedure does Proposer have in place?
20. Describe Proposer's approach to project organization and management, including the responsibilities of Proposer's management and staff personnel that will perform work in this project.
21. Describe Proposer's capability of consolidating two (2) sets of data files into one (1) notice "and/or" consolidating two (2) sets of notices into one (1) envelope for mailing

## **Proposer Information**

22. Provide a project schedule identifying specific key tasks and duration.
23. Identify if Proposer has taken any exception to the terms of this Solicitation. If so, indicate what alternative is being offered and the cost implications of the exception(s).