SUBJECT: PRINITNG SERVICES FOR DUVAL COUNTY TAX COLLECTOR

BID #: SC-0451-17 **OPEN DATE: 2017-04-05**

GENERAL GOVERNMENT AWARDS COMMITTEE

KIND AND BASIS OF CONTRACT: SUPPLY/SERVICE CONTRACT – THREE YEARS FROM JUNE 7, 2017, WITH TWO (2) ONE (1) YEAR RENEWAL OPTIONS

AGENCY: DUVAL COUNTY TAX COLLECTOR

BASIS OF AWARD: ALL OR NONE TO THE LOWEST RESPONSIVE, RESPONSIBLE BIDDER(S)

NUMBER OF BIDS INVITED: 9 **NUMBER RECEIVED:** 3 **OTHER:** 0

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to reject Southwest Direct, for failing to provide proof that they have created the local business tax notices, in the form of samples, as requested in the Requirements of the Terms and Conditions.

Accordingly, recommend approval of award to the lowest responsive, responsible bidder, Cathedral Corporation, to provide , printing services for the Duval County Tax Collector Office. Period of service is three years from June 7, 2017 with two (2) one (1) year renewal options. The estimated annual expenditure not-to-exceed $125,000.00, for a total requested award amount of $375,000.00.

Funding for this award to be encumbered by accounts TCSG017-03410, to be executed by purchase order(s).

Attachments: Recommendation Memo, Bid Tabulation Sheet, Terms and Conditions, Specifications, Rejection Letter

ANALYST: _____
CHELSEY RENFROE

RESPECTFULLY SUBMITTED: _____
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Kevin Rock, Director of Administrative Services, Duval County Tax Collector

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF GGAC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

DUVAL COUNTY TAX COLLECTOR
www.coj.net/tc
taxcollector@coj.net

MICHAEL CORRIGAN
TAX COLLECTOR

231 E. FORSYTH ST., SUITE 200
JACKSONVILLE, FLORIDA 32202-3356

Memorandum

Date: April 20, 2017

To: Greg Pease, Chief, Procurement Division

Thru: Chelsey Renfroe, Purchasing Analyst, Procurement Division

From: Kevin Rock, Director of Administrative Services, Duval County Tax Collector
Debra Doran, Chief Financial Officer, Duval County Tax Collector

Subject: Recommendations for Bid SC-0451-17

The Tax Collector's office has reviewed the bids submitted for bid SC-0451-17, Printing Services for Duval County Tax Collector. As part of the bid, there are minimum specifications required for successful vendors bidding on this project:

Minimum Requirements

To ensure the quality of the final product, the Tax Collector reserves the right to give preference to vendors with experience working with Florida Tax Collector offices. The vendor must provide proof that they have produced mailings including auto tag renewals, property tax notices and local business tax for another Florida county successfully for at least one year within the last three years. The reference counties must have at least 20,000 auto tag renewals per month and a minimum of 200,000 combined Real Estate and Tangible Personal Property Tax accounts. Proof must be in the form of sample notices included with the bid response that demonstrate said ability. The mailings must have been produced from files sent from the State of Florida DMV and from a Florida county. Mailing of notices not printed using a print file does not qualify as sufficient proof of experience. Printing of postcard style renewal notices does not qualify as proof of competency in printing DMV renewal notices.

After an extensive review of the information, we make the following recommendations:

1) The Tax Collector's Office recommends rejecting the lowest price per thousand bid provided by Southwest Direct. As required in the Minimum Requirements section of the bid specifications, Southwest Direct did not provide proof that they have created local business tax notices. Furthermore, when applying the price per thousand to the anticipated volumes

of documents, as provided in the bid, Southwest Direct is actually the 2nd lowest responding bidder.

2) The Tax Collector's Office recommends the acceptance of the bid provided by the apparent next lowest bidder, Cathedral Corporation. Cathedral provided adequate samples to prove that they meet the minimum requirements in the bid specifications. Additionally, Cathedral's price per thousand documents is the lowest response when applied to anticipated yearly volume, as provided in the bid document.

   Accordingly, the Tax Collector's office recommends Cathedral Corporation as the lowest responsive, responsible bidder for SC-0451-17. Period of service is three (3) years from June 2017 with two (2) one (1) year renewal options. Initial estimated annual expenditure is not to exceed $125,000.00.

Renfroe, Chelsey

From: Doran, Debra
Sent: Friday, April 21, 2017 9:50 AM
To: Renfroe, Chelsey
Cc: Rock, Kevin
Subject: RE: SC-0451-17

Yes, that would be great. The funding source is TCSG017-03410.

-----Original Message-----
From: Renfroe, Chelsey
Sent: Friday, April 21, 2017 9:49 AM
To: Doran, Debra
Cc: Rock, Kevin
Subject: RE: SC-0451-17

Thank you, I am getting this prepared for next Thursday's GGAC meeting. Can you provide the funding source(s) for the award? Also since the award period is for three years from June 7, 2017, do you want to go ahead and request $375,000.00 ($125,000 for each year) so you don't have to go back each year to request an increase?

Thank you,
Chelsey Renfroe
Purchasing Analyst
Procurement Division
City of Jacksonville
crenfroe@coj.net
Direct 904.255.8826

-----Original Message-----
From: Doran, Debra
Sent: Thursday, April 20, 2017 2:58 PM
To: Renfroe, Chelsey
Cc: Rock, Kevin
Subject: SC-0451-17

Please see the attached.

-----Original Message-----
From: P0000@coj.net [mailto:P0000@coj.net]
Sent: Thursday, April 20, 2017 2:37 PM
To: Doran, Debra
Subject: COJ

Title: PRINTING SERVICES FOR DUVAL COUNTY TAX COLLECTOR
Bid # SC-0451-17
Bid Date: 4/5/17
Buyer: Chelsey Renfroe
No. Invited: 9 **No. Received: 3** **No Bids: 0**
4/5/2017
Date
Recorded By: Gail Sampson

ITEM	DESCRIPTION	Est. QTY	UoM	SOUTHWEST DIRECT UNIT PRICE	SOUTHWEST DIRECT EXTENDED TOTAL	CATHEDRAL CORPORATION UNIT PRICE	CATHEDRAL CORPORATION EXTENDED TOTAL	POSTAL CENTER INTERNATIONAL, INC. UNIT PRICE	POSTAL CENTER INTERNATIONAL, INC. EXTENDED TOTAL
1	**COST TO PRODUCE TAG RENEWAL NOTICES;** TO INCLUDE (2) STUFF INSERTS AND (2) COLOR PRINTING NO SUBSTITUTE NOTE: MAILING INTERVALS PER SPECIFICATIONS NOT INCLUDING POSTAGE	1000	LO	$0.077	$77.00	$0.0650	$65.00	$0.0701	$70.10
2	**COST TO PRODUCE PROPERTY TAX NOTICES;** TO INCLUDE (2) STUFF INSERTS AND (2) COLOR PRINTING NO SUBSTITUTE NOTE: MAILING INTERVALS PER SPECIFICATIONS NOT INCLUDING POSTAGE	1000	LO	$0.077	$77.00	$0.0920	$92.00	$0.0945	$94.50
3	**COST TO PRODUCE HANDICAP PLACARD NOTICES;** TO INCLUDE (2) STUFF INSERTS AND (2) COLOR PRINTING NO SUBSTITUTE NOTE: MAILING INTERVALS PER SPECIFICATIONS NOT INCLUDING POSTAGE	1000	LO	$0.077	$77.00	$0.0650	$65.00	$0.0701	$70.10
4	**COST TO PRODUCE MOBILE HOME RENEWALS;** TO INCLUDE (2) STUFF INSERTS AND (2) COLOR PRINTING NO SUBSTITUTE NOTE: MAILING INTERVALS PER SPECIFICATIONS NOT INCLUDING POSTAGE	1000	LO	$0.077	$77.00	$0.0650	$65.00	$0.0701	$70.10
5	**COST TO PRODUCE LOCAL BUSINESS TAX NOTICES;** TO INCLUDE (2) STUFF INSERTS AND (2) COLOR PRINTING NO SUBSTITUTE NOTE: MAILING INTERVALS PER SPECIFICATIONS NOT INCLUDING POSTAGE	1000	LO	$0.080	$80.00	$0.1142	$114.20	$0.1094	$109.40
6	**PROPERTY TAX REMINDER NOTICES;** TO INCLUDE (2) STUFF INSERTS AND (2) COLOR PRINTING NO SUBSTITUTE NOTE: MAILING INTERVALS PER SPECIFICATIONS NOT INCLUDING POSTAGE	1000	LO	$0.080	$80.00	$0.0920	$92.00	$0.0950	$95.00
7	**PROPERTY TAX INSTALLMENT NOTICES;** TO INCLUDE (2) STUFF INSERTS AND (2) COLOR PRINTING NO SUBSTITUTE NOTE: MAILING INTERVALS PER SPECIFICATIONS NOT INCLUDING POSTAGE	1000	LO	$0.080	$80.00	$0.0920	$92.00	$0.0965	$96.50
8	**COST TO STUFF ADDITIONAL INSERTS** NO SUBSTITUTE	1000	LO	$0.002	$2.00	$0.00	$0.00	$0.0050	$5.00
	TOTAL:			**$550.00**		**$585.20**		**$610.70**	
	TERM:			**Not Stated**		**NET 0**		**Not Stated**	
	DELIVERY;			**Not Stated**		**Not Stated**		**Not Stated**	
	CONFLICT OF INTEREST:			✓		✓		✓	
	SIGNED BID FORM:			✓		✓		✓	
	ADDENDUMS	1		✓		✓		✓	
	PROOF OF AT LEAST (1) YR EXPERIENCE (W/IN THE LAST (3) YRS) PRODUCING MAILINGS, INCLUDING AUTO TAG RENEWALS, BUSINESS TAX NOTICES, & LOCAL BUSINESS TAX FOR ANOTHER FLORIDA COUNTY:			**SEE NOTE**		✓		**Not Stated**	
	NOTES:			**VENDOR DID NOT PROVIDE SAMPLES OF LOCAL BUSINESS TAX REMINDERS AS REQUIRED**		**ITEM 8 REPRESENTS A NO CHARGE FOR THIS ITEM**			

ANTICIPATED ANNUAL VOLUME TABULATION (IN THOUSANDS)

Title: PRINTING SERVICES FOR DUVAL COUNTY TAX COLLECTOR
Bid # SC-0451-17
Bid Date: 4/5/17
Buyer: Chelsey Renfroe
No. Invited: 9 No. Received: 3 No Bids: 0
4/5/2017
Date
Recorded By: Gail Sampson

ITEM	DESCRIPTION	ANTICIPATED ANNUAL VOLUME IN THOUSANDS	SOUTHWEST DIRECT UNIT PRICE	SOUTHWEST DIRECT EXTENDED TOTAL	CATHEDRAL CORPORATION UNIT PRICE	CATHEDRAL CORPORATION EXTENDED TOTAL	POSTAL CENTER INTERNATIONAL, INC. UNIT PRICE	POSTAL CENTER INTERNATIONAL, INC. EXTENDED TOTAL
1	TAG RENEWAL NOTICES	782	$77.00	$60,214.00	$65.00	$50,830.00	$70.10	$54,818.20
2	PROPERTY TAX NOTICES	385	$77.00	$29,645.00	$92.00	$35,420.00	$94.50	$36,382.50
3	HANDICAP PLACARD NOTICES	12	$77.00	$924.00	$65.00	$780.00	$70.10	$841.20
4	MOBILE HOME RENEWALS	11	$77.00	$847.00	$65.00	$715.00	$70.10	$771.10
5	LOCAL BUSINESS TAX NOTICES	67	$80.00	$5,360.00	$114.20	$7,651.40	$109.40	$7,329.80
6	PROPERTY TAX REMINDER NOTICES	44	$80.00	$3,520.00	$92.00	$4,048.00	$95.00	$4,180.00
7	PROPERTY TAX INSTALLMENT NOTICES	36	$80.00	$2,880.00	$92.00	$3,312.00	$96.50	$3,474.00
		TOTAL:	**$103,390.00**		**$102,756.40**		**$107,796.80**	

	SOUTHWEST DIRECT	CATHEDRAL CORPORATION	POSTAL CENTER INTERNATIONAL, INC.
TERM:	Not Stated	NET 0	Not Stated
DELIVERY;	Not Stated	Not Stated	Not Stated
CONFLICT OF INTEREST:	✓	✓	✓
SIGNED BID FORM:	✓	✓	✓
ADDENDUMS	✓	✓	✓
PROOF OF AT LEAST (1) YR EXPERIENCE (W/IN THE LAST (3) YRS) PRODUCING MAILINGS, INCLUDING AUTO TAG RENEWALS, BUSINESS TAX NOTICES, & LOCAL BUSINESS TAX FOR ANOTHER FLORIDA COUNTY:	SEE NOTE	✓	Not Stated
NOTES:	VENDOR DID NOT PROVIDE SAMPLES OF LOCAL BUSINESS TAX REMINDERS AS REQUIRED		

TERMS AND CONDITIONS
PRINTING SERVICES FOR DUVAL COUNTY TAX COLLECTORS OFFICE

SCOPE

The Duval County Tax Collectors Office of the City of Jacksonville, Florida is currently accepting bids to obtain source(s) of supply for the item(s) / service(s) as outlined in the bid documents provided. The purpose of this bid invitation is to obtain information about your firm and its ability to provide these items and to obtain pricing commitments for **the creation and mailing of renewals and notices as listed in the bid documents.**

AWARD

Award will be **ALL OR NONE** to the lowest responsive, responsible bidder. Bidders must bid on all items in a group to be considered for award. ALL awards are subject to the availability of funds.

TERM OF AGREEMENT

The term of this agreement is three (3) years from June 7, 2017, with two (2) one (1) year renewal options. Renewal Options may be exercised at the discretion of the City based on supplier performance and adherence to the terms and condition set forth in the bid documents.

REQUIREMENTS

Bidders should submit or comply with the following requirements; failure to submit any of these requirements may be grounds for rejection:

- Vendors must submit proof of at least one (1) year experience (within the last three (3) years) producing mailings, including auto tag renewals, business tax notices, and local business tax for another Florida county. The county must have at least 20,000 auto tag renewals per month and a minimum of 200,000 combined Real Estate and Tangible Personal Property Tax accounts. Proof must be submitted in the form of sample notices that demonstrate the ability to produce the various types of notices. The mailings must have been produced from files sent from the Florida DHSMV and tax notices from a county within the State of Florida. Mailing of notices not printed using a print file does not qualify as sufficient proof of experience. Printing of postcard style renewal notices does not qualify as proof of competency in printing DMV renewal notices.

STATE CONTRACTS

The City reserves the right to utilize contracts established by the State of Florida and or other governmental agencies for item(s)/service(s) covered under this bid. The city reserves the right to cancel this contract in whole or in part for such item(s)/service(s).

QUANTITIES

Quantities indicated reflect the estimated quantities to be purchased throughout the contract period and are subject to fluctuation in accordance with actual requirements. The City reserves the right to purchase more than the estimated quantities listed or not to make any purchase against this bid if it so deems necessary anytime during the contract period.

ESCALATION/DE-ESCALATION

All pricing submitted shall remain firm for the initial term period. Upon renewal (if applicable), a supplier may submit in writing a request for price escalation/de-escalation for the percentage of change as listed in the Consumer Pricing Index (CPI) and/or documentation notifying of an industry wide increase. The City reserves

the right to decline any price increase request.

PRICES

All unit prices shall include freight, delivery, and handling charges to the delivery location as outlined in the bid documents. The prices do not include the cost of postage.

DELIVERY

All samples or approval forms must be sent to the Tax Collector project manager, Kevin Rock via hard copy mail. The address is: Tax Collector – attn.: Kevin Rock, 231 E. Forsyth Street, RM 300A, Jacksonville FL 32202.

A packing list shall accompany all shipments, which shall indicate, at a minimum, the following; purchase order number, description of the print job, date of final print production, date of shipment, and number of samples processed.

PICK UP AND RETURNS

The City reserves the right to reject the print output of any job if it does not match the signed proof or is not in compliance with the bid specifications. Proofs will be sent in two stages. Once a sample set of records has been produced, actual printed copies from the same software and hardware that will be used during the production run must be submitted. These proofs must be mailed to the office for testing on Tax Collector high speed processing equipment. The approval sheet must be signed by a representative of the Tax Collector's office to be considered approved. Once the production data has been sent, electronic or hard copy samples (as determined by the Tax Collector) of the final product must be sent to the Tax Collector for final approval. Again, a signed approval will be faxed or emailed to the print vendor before production printing begins. The City or its agencies will determine compliance with bid specifications. Print jobs that do not match the specifications must be re-run within 48 hours of notification at no charge to the City or its agencies.

COMPLIANCE WITH SPECIFICATIONS

The bidder, by affixing their signature to the bid form submitted, agrees to provide item(s)/service(s) in accordance with the bid documents provided. Bid only a single offering for each bid item. Multiple offerings, alternates (unless stated) and or stipulations may be cause for bid rejection. Bid only on forms provided herein unless otherwise stated. Bid submissions shall be in ink or typewritten. All corrections must be initialed.

INVOICING

Invoices will be issued once supplies/services are delivered and/or rendered to the City of Jacksonville or its agencies. At a minimum, invoices must include; purchase order number, item description (renewal month for registration notices), mailing date, number of records processed and mailed, unit prices, unit of measure, and extended totals. A separate invoice on a quarterly basis for anticipated postage to be held in escrow by the vendor. This postage invoice must be produced at least 30 days prior to an affected mailing. At the close of the contract, all postage held escrow must be returned to the Tax Collector's Office within 30 days. Payment terms are Net 30 days. All original invoices shall be submitted to: City of Jacksonville, General Accounting Division, 117 West Duval Street, Suite 375, Jacksonville, Florida 32202.

INSURANCE/INDEMNIFICATION

Each supplier shall maintain, for the entire term of this bid, current insurance coverage as stated in the bid documents. All insurance certificates shall list the City of Jacksonville as an additional insured. The awarded vendor will be required to submit the copy of insurance certificate within ten (10) days from date of receipt of award notice. Bid number should be listed on certificate.

REPORTING

The City may request, during the term of this bid, reports including but not limited to; usage, pricing, and delivery. Suppliers will be required to provide reports requested in hard copy and electronic format as required. The Tax Collector will also require a monthly accounting of all postage held in escrow.

SPECIFICATIONS

Duval Combined Printing Specifications

All unit prices shall include freight, delivery, and handling charges to the delivery location as outlined in the bid documents.

1. GENERAL INFORMATION

The Duval County Tax Collector (Tax Collector) is charged with the printing of several billing documents throughout the year. These documents cover many different payment types as outlined below. The estimated total to be printed under this bid is 1.5 million documents per year. The Tax Collector's Office outsources the printing of these documents to a single vendor so as to ensure consistency and quality of the final print product. Any individual billing process listed below may be eliminated at any time due to legislative or procedural changes. Other billings may be added as well.

2. MINIMUM REQUIREMENTS

Because of the need to ensure the quality of the final product, the Tax Collector reserves the right to give preference to vendors with experience working with other Florida Tax Collector offices. The vendor must provide proof that they have produced mailings including auto tag renewals, property tax notices and local business tax for another Florida county successfully for at least one year within the last three years. The reference counties must have at least 20,000 auto tag renewals per month and a minimum of 200,000 combined Real Estate and Tangible Personal Property Tax accounts. Proof must be in the form of sample notices included with the bid response that demonstrate the ability to produce the various types of notices. The mailings must have been produced from files sent from the Florida DHSMV and tax notices from a county within the state of Florida. Mailing of notices not printed using a print file does not qualify as sufficient proof of experience. Printing of postcard style renewal notices does not qualify as proof of competency in printing DMV renewal notices.

3. TAX COLLECTOR RESPONSIBILITIES

A. The Tax Collector will provide the vendor a print file or a location where the print file is located. The Tax Collector or designee will supply the successful bidder the data via file transfer.

B. Tax Collector may request up to two additional inserts to be included with the mailings. The price to insert these two inserts must be included in the bid price. The Tax Collector will supply the inserts to the successful bidder prior to the mailings with instructions detailing which bill type requires which inserts. The Tax Collector will supply the inserts in a format that meets the successful bidder's specifications and machine requirements for automated inserting. The Tax Collector may also request that the successful bidder print the inserts. Pricing for the printing of inserts must be quoted separately on the attached form.

A. The Tax Collector will proof documents to be printed via file transfer (FTP), electronic email, or another reasonable method. There may be an unlimited number of email correspondences during the proofing processes.

B. The Tax Collector will provide the vendor a signed approval sheet once printed documents have been sent to the Tax Collector or designee for final proof. The printer is not to proceed with the full

production print run until the Tax Collector or designee has signed and returned the proof document in either PDF or original format. The signed proof may be mailed or transmitted as a PDF document via FTP, facsimile or attached to an email.

C. After the print job is complete, the Tax Collector will decide which materials should be returned. The cost to return any items will be paid by the Tax Collector at actual shipping costs.

4. SUCCESSFUL BIDDERS RESPONSIBILITIES

A. Successful bidder will receive data from the Tax Collector, State of Florida or other City of Jacksonville agencies as defined by the Tax Collector.

B. Successful bidder shall accept and be able to receive the data via ftp.

C. Initial Programming:

1. Successful bidder will perform any initial programming on the data to create the bills as required. Some of the initial programming required will include:

   a) Form creation to fit data records format as acceptable and approved by Duval County Tax Collector.

   b) Provide for areas with variable messages. There may be several such messages per document.

   c) The vendor will produce a scan line on the billing document as described by the Tax Collector in an OCR B, 10 point font, placed on the document in a location acceptable to the Tax Collector's high speed processing equipment.

2. The Vendor will provide additional programming as mandated by legislative and procedural changes. All programming costs must be included as part of the overall per item charge in the pricing matrix (no separate additive fee).

D. Successful bidder to supply paper printed 2/1 and simplex laser print on 8 ½" x 11", 60# offset for bill stock or 24# white paper for those printed on plain paper. The paper will have one and may have up to two horizontal perforations along the top and bottom 1/3rd of each page. The preprinted paper will be two color (white paper, and up to two colors). The color combination will vary depending upon the Printing Process below.

E. Successful bidder will fold and insert the bills into #10 single, 24# white weave window envelope, with a #9 window, business reply envelope. The #10 window envelopes will be pre-printed on the front and back in 1/1 ink, one color. The #9 window envelopes will need to be pre-printed on the front and back in 2/2 ink. The #9 return window envelopes have a colored bar that bleeds to the back of the envelope. The position of the bar varies by payment type. Both the #10 and #9 window envelopes will be supplied by the successful bidder. The colors of the envelopes will vary by Printing Process as described below. The location of the window on the #9 return envelopes must meet the specifications of the Tax Collector mail opening vendor (currently Opex).

F. The successful bidder shall be capable of inserting stub sized inserts into the mailing. Successful bidder shall provide specifications regarding the size and weight of the inserts to the Tax Collector so as to meet machine requirements for automated inserting.

G. The successful bidder will seal, sort, bundle and meter renewals at the lowest qualifying First Class rate for postal discounts. A postage report will be provided to the Tax Collector for each run.

H. The completed mailing must be delivered to the postal facility by the vendor. The successful bidder and Tax Collector will work together to determine a schedule.

I. Any "no-mail" notices, accounts with "bad" addresses, or unused inserts will be delivered back to the Tax Collector. "No mail" notices may be delivered to the Tax Collector as an electronic file so as to save printing.

J. The successful bidder will write programs to combine all bills that have an identical customer name and mailing address. Successful bidder will combine multiple forms to insert into one #10 or larger bulk envelope for mailing. The combination of bills should be such that it maximizes postal savings.

K. The successful bidder will maintain no more than a 90 day supply of preprinted paper stock on hand for any monthly mailing. Changes in business operations and legislation may require us to update preprinted information at least quarterly.

L. The successful bidder will provide monthly invoices detailing all printing by project. The report should clearly define major printing groups by payment type or message group as defined by the Tax Collector.

M. The bidder will **not** include the cost of postage on the bid form. Postage will be paid separately by the Tax Collector. The vendor must provide a monthly accounting of all postal funds on hand and estimates for upcoming mailings.

N. The vendor will CASS certify the addresses and zip codes to maximize postal discounts.

O. The vendor will provide move update service for the local business tax file using the NCOA database.

P. The vendor must be able to demonstrate their quality controls in regard to the following:

1) Track the number of documents printed vs. records sent.
2) Produce a scan line in the correct location that is capable of being read by the Tax Collector's remittance processing equipment.
3) Overall print quality, consistency of fonts, lack of streaking, and quality and placement of the scanline.
4) Alignment of perforations on preprinted stock.
5) Quality of envelope construction and printing.
6) Ability to meet postal requirements in regards to addressing.

5. Printing Specifications by Project

A. Tag Renewals

The Tax Collector produces auto tag renewals based on data provided by the Florida Department of Highway Safety and Motor Vehicles (DMV). The file is sent via FTP to the vendor on a monthly basis. The file is produced 60 days in advance, generally the first week of the month. The vendor will have until the 20th of the month to produce the renewals (40 days prior to the first day of the month due). The vendor will produce renewals based on business logic provided by the DMV and Duval County Tax Collector. The renewals are printed two-up (two to a page) on the first page, and three-up (three to a page) on subsequent pages, combining renewals belonging to a single owner. There are places on the front of the document for variable messages based on a hierarchy of business rules. The back of bill contains extensive information which is subject to change on a quarterly basis. The vendor should maintain no more than a 90 day supply of preprinted paper stock on hand so that changes may be made to the stock. Envelopes may be printed in larger quantities as approved by the Tax Collector or designee.

Monthly Volume: 10 months at approximately 60,000 renewals each month and at approximately 102,000 renewals in December and 80,000 renewals in June.

B. Handicap Parking Placard Renewals

The Tax Collector provides renewal notices to individuals with handicap parking placards. This file is sent monthly from the DMV on the same schedule as tag renewals. The vendor must produce messages on the bills based on logic supplied by the Tax Collector. These renewals are combined with the tag renewal file so that both renewals are intermingled into the same envelope with the corresponding tag renewal notice. These placard renewals are printed on the same bills stock as tag renewals. These renewals use the same envelopes as tag renewals. These renewals must be processed by the 20th of the month (40 days in advance of the first day of the month due).

Monthly Volume: approximately 1,000 renewals per month.

C. Mobile Home Renewals

The Tax Collector provides renewal notices to individuals with mobile homes. The file is generated by the DMV. The file is produced in two segments, one for current renewals and another for delinquent accounts. The notices are produced in September or October (as directed by the Tax Collector) as December renewals. These notices are not intermingled with other registration renewals. The vendor must produce messages on the bills based on logic supplied by the Tax Collector. These bills use the same bill stock and envelopes as other tag renewals. These notices must be mailed by the 20th of October each year.

Monthly Volume: approximately 11,000 renewals in December only.

D. Local Business Tax Renewals

The Tax Collector provides notices for local business tax customers. The data is generated by the Tax Collector's data processing systems and sent via file transfer to the vendor by the 15th of the previous month (June 15th for July renewals). The notice provides a payment calculation chart on the back of the

document based on variable data contained in the record. These bills have their own paper stock and corresponding envelopes. The renewals must be mailed by June 30th each year. The vendor must produce messages on the bills based on logic supplied by the Tax Collector. The vendor must sort the data for multiples based on owner name and mailing address, combining multiple bills into a single envelope (number to be determined by postage costs) so as to maximize the postal discount. The vendor must provide "Move Update" service on the file to ensure the most accurate current address. Large multiples must be combined into a single flat envelope.

Monthly Volume: Approximately 67,000, one time per year in mid-June.

E. Property Tax Billing

The Tax Collector provides payment notices to property tax customers annually. These bills are subdivided into three main groups – ***Real Estate Tax Bills*** (blue logo and accents with light blue shading, one perforation – Approximately 190K contained in the real estate file, real estate specific envelope, black ink), ***Information Notices*** (plain white, no perforation – Approximately 160K, contained in the real estate file, uses the same envelope as real estate tax bills, no return envelope, printed blue and black ink), ***Personal Property Tax Bills*** (green logo and accents with light green shading, one perforation, approximately 14K bills, contained in the personal property tax file, personal property envelope, one return envelope, printed in black ink). The back of the bill is printed in blue or green on the stock and the message is the same for Real Estate and Personal Property…the back of the Information Notices are printed in blue. Vendor supplies bill stock, mailing envelopes and return envelopes. The real estate bill (blue stripe) and personal property bill (green stripe) have their own bill stock and their own #10 outgoing window envelope with different messages. Both use the same return envelope. The information notice uses the same outgoing envelope as real estate bill. As with all printing projects we will pay postage separately and it should **not** be included in the bid pricing. We may have up to two inserts per envelope. The cost to insert must be included in the bid price. The inserts may vary based on the bill type above. The data will be sent from our tax collection system in an electronic format (flat file). There will be two files – Real Estate, and Personal Property. The vendor must produce messages on the bills based on logic supplied by the Tax Collector. The vendor must sort the data for multiples, combining multiple bills into a single envelope (number to be determined by postage costs) to maximize postal discount. Large multiples must be combined into a single flat envelope. The bill file is produced in mid-October (usually by the 20th) and must be mailed by October 31st.

Monthly Volume: Approximately 385,000 bills in mid-October only, mailed by October 31st.

F. Property Tax Reminder Notices

The Tax Collector's office produces reminder notices in March or April of each year. The Tax Collector will produce a file in mid-March or April and transfer the file to the vendor. The vendor will produce notices in a format similar to the November mailing but with specific changes mandated by the Tax Collector's office. There will be two mailings: one for real estate taxes (approximately 42K) and the other for personal property taxes (approximately 1,500). The form will be the same as used in the November mailing. A #10 outgoing window envelope and #9 return window envelope of the same specifications as the November personal property mailing. As with all printing projects we will pay postage separately and it should **not** be included in the bid pricing. There may be up to two inserts in the mailings. The cost to insert must be included in the bid price. The inserts may vary the based on the bill type above. The vendor must sort the data for multiples, combining multiple bills into a single envelope (number to be determined by postage costs) to maximize postal discount. Large multiples

must be combined into a single flat envelope. The reminder file is produced in mid-March or Mid-April and must be mailed no later than the third week of the month in which the file is received.

Monthly Volume: Approximately 44K accounts in mid-March or April, mailed by the middle of the month in which the file is received.

G. Property Tax Installment Notices

The Tax Collector's office produces installment notices quarterly (June, September, December and March). The Tax Collector will produce a file in the middle of the month preceding the installment notice date and transfer the file to the vendor. The vendor will produce notices in a format similar to the reminder notice but with specific changes mandated by the Tax Collector's office. There will be two mailings: one for real estate taxes (approximately 9K per mailing) and the other for personal property taxes (approximately 40 accounts per mailing). The form will be the same as used in the November mailing. A #10 outgoing window envelope and #9 return window envelope of the same specifications as the November personal property mailing. As with all printing projects we will pay postage separately and it should **not** be included in the bid pricing. There may be up to two inserts in the mailings. The cost to insert must be included in the bid price. The inserts may vary based on the based on the bill type above. The vendor must sort the data for multiples, combining multiple bills into a single envelope (number to be determined by postage costs) to maximize postal discount. Large multiples must be combined into a single flat envelope.

Monthly Volume: Approximately 9K bills quarterly (June, September, December and March), file received in the middle of the month preceding the notice month above. Notices should be mailed by the last day of the month in which the file is received.

PROCUREMENT DIVISION

Jacksonville
Where Florida Begins.

April 24, 2017

2129 Andrea Lane
Ft. Myers, FL 33912

NOTIFICATION OF FORMAL BID REJECTION

BIDDERS' NAME: Southwest Direct

CONTACT NAME: Ricki Black

BID NUMBER: SC-0451-17

NAME OF BID: Printing Services for Duval County Tax Collector

DATE OPENED: April 5, 2017

REASON FOR REJECTION:

Vendor is being rejected for failing to provide proof of having created the local business tax notices, in the form of samples, as requested in the Requirements of the Terms and Conditions.

IF YOU WISH TO PROTEST THE RECOMMENDED REJECTION OF THIS BID, PLEASE RESPOND IN ACCORDANCE WITH THE CITY OF JACKSONVILLE BID PROTEST PROCEDURES. DIRECT ALL PROTEST TO THE RESPECTIVE ANALYST/BUYER, AT CRENFROE@COJ.NET.

ANALYST'S SIGNATURE: _____
CHELSEY RENFROE

Renfroe, Chelsey

From: Renfroe, Chelsey
Sent: Monday, April 24, 2017 8:09 AM
To: 'Ricki'
Subject: SC-0451-17 Printing Services for Duval County Tax Collector - Rejection Notification
Attachments: SC-0451-17 Southwest Direct Notification.pdf

Please see the attached notification of rejection for subject bid.

Thank you,
Chelsey Renfroe
Purchasing Analyst
Procurement Division
City of Jacksonville
crenfroe@coj.net
Direct 904.255.8826

CITY OF JACKSONVILLE

QWS3270X 4/21/2017 10:03 AM
FAML6350 V5.1 ** NW COJ FAMIS PRODUCTION ** 04/21/2017
LINK TO: ACCOUNT SUMMARY INQUIRY 10:02 AM

FISCAL MO/YEAR : 07 2017 CURRENCY CODE :
INDEX CODE : TCSG017 GENERAL OPERATIONS
SUBOBJECT : 03410 CONTRACTUAL SERVICES
PROJECT :
PROJECT DETAIL :
GRANT :
GRANT DETAIL :
USER CODE :

S	APR 2017	ANNUAL BALANCE	ALL YEARS BALANCE
ESTIMATED REVENUES	.00	.00	.00
REVENUES	.00	.00	.00
UNREALIZED REVENUES	.00	.00	.00
BUDGET	.00	371,934.86	371,934.86
EXPENDITURES	11,701.08	108,750.48	108,750.48
ENCUMBRANCES	13,298.92	153,684.38	153,684.38
PRE-ENCUMBRANCES	.00	.00	.00
REMAINING BALANCE	-25,000.00	109,500.00	109,500.00

F1-HELP F2-SELECT F4-PRIOR F5-NEXT
F9-LINK F10-PRIOR-MO F11-NEXT-MO

G014 - RECORD FOUND