

OFFICE OF TAX COLLECTOR
ORANGE COUNTY, FLORIDA



REQUEST FOR PROPOSAL

OFFICIAL DOCUMENT PRINTING SERVICES

TC-PUR 121817-DP

SUBMIT PROPOSALS IN PERSON OR BY U.S. MAIL TO

CINDY VALENTINE, ASSISTANT TAX COLLECTOR
TAX COLLECTOR'S OFFICE
SUNTRUST CENTER TOWER
200 S. ORANGE AVENUE, 16TH FLOOR
ORLANDO, FL 32801

PROPOSALS ARE DUE NO LATER THAN 11 a.m. on January 19, 2018

Table of Contents

Objectives	3
Bidder Qualifications	3
Receipt of Proposals	3
Questions and Inquiries	4
Reservations.....	4
Reimbursements	5
Equal Opportunity Clause	5
Convicted Vendor List	5
Drug Free Workplace	5
Non-Discrimination of Employment	6
Scope of Services	6
Proposal Process and Timetable	13
Terms and Conditions	14
Contract Forms, Terms and Extensions	17
Indemnify	17
Capabilities	18
Experience	19
Bid Response	20
Pro-Forma	21
Forms	22

The Tax Collector will receive sealed proposals for: Proposal NO. TC-PUR-121817-DP Official Document Printing Services until 11 a.m. local time on January 19th, 2018.

OBJECTIVES

The Tax Collector, Orange County, Florida (herein after referred to as T/C) is currently accepting bids to produce, carrier route, heavy trucks, commercial vehicles, sort and mail Tax Bills, Information Notice Packages, Business Tax Bills, Vehicle, Boat and Mobile Home Renewal Notices for Orange County residents from information supplied by the T/C and/or Florida Department of Highway Safety and Motor Vehicles (DHSMV). It is the intent of the T/C to enter into a contract with a bidder who can provide the services described herein.

BIDDER QUALIFICATIONS

- Experience with electronic data processing services
- FTP capabilities
- Ability to manipulate data to the needs of the Tax Collector
- Ability to accept and implement monthly changes as determined by the Tax Collector or Florida DHSMV
- Ability to respond to data information requests
- Ability to produce customized special messages based on certain criteria in the data and print on renewal notices
- Ability to provide criteria the bidder's program uses to determine when customized special messages print
- Ability to monthly update addresses using NCOA
- Ability to exclude non-deliverable addresses from mailings
- Ability to handle insertions, sort to zip and mail
- Ability to protect sensitive, non-public data

RECEIPT OF PROPOSALS

The submitted proposal must be received by Cindy Valentine, Assistant Tax Collector prior to the date and time specified in the timelines (see page 14). The mere fact that the proposal was sent will not be considered received, so proposers must ensure that proposals are delivered timely.

Sealed proposals may not be amended or otherwise changed by any writing placed outside the sealed package. However, any such written "outside" communication by a proposer shall be construed by T/C as indicating a withdrawal of the sealed proposal to which the communication relates (thereby causing the proposer to have issued "no proposal" for consideration by the T/C).

The delivery of said proposal to the T/C's office prior to the time and date stated in this proposal is solely and strictly the responsibility of the Proposer. The T/C will in no way be responsible for delays caused by the United States Postal Service or for delays caused by any other occurrence.

The bidder is solely responsible for reading and completely understanding the requirements and the specifications of the proposal items. Under no circumstances will a proposal delivered after the delivery time specified be considered. Late proposals will be returned to the bidders unopened with the notation: "This proposal was received after the delivery time designated for receipt."

Proposals may be withdrawn on written or facsimile requests dispatched by the bidder in time for delivery in the normal course of business prior to the time fixed, provided that written confirmation of any facsimile withdrawal over the signature of the bidder is placed in the mail and postmarked prior to the time set for the opening of bid proposals. Negligence on the part of the bidder in preparing his/her proposal confers no right of withdrawal or modification of his/her proposal after such proposal has been opened by the T/C. Bidders may not withdraw or modify their proposals after the appointed proposal deadline. In addition, proposals will be in force for a period of ninety (90) days after the acceptance of proposals.

No interpretation of the meaning of the specifications or other contract documents will be made to any bidders verbally. Each request for such interpretation must be in writing and emailed to Cindy Valentine – Assistant Tax Collector, cvalentine@octaxcol.com, as the appropriate Tax Collector's representative. To be given consideration, such requests must be received by January 18, 2018 at 4 P.M. Any interpretations and supplemental instructions must be in the form of a written addendum which, if issued, shall be sent to all prospective bidders at the respective email or regular mail address. Failure of any bidder to receive any addendum or interpretation shall not relieve said bidder from obligation under his/her proposal submitted. All addenda issued shall become part of the contract documents.

QUESTIONS AND INQUIRIES

Requests for clarification or additional information should be directed to cvalentine@octaxcol.com. All inquiries must be e-mailed; no inquiries or questions will be entertained over the phone or fax. Questions should be submitted in writing no later than 4 P.M. on January 2, 2018.

RESERVATIONS

The T/C reserves the right to accept or reject any and/or all bids, to waive irregularities and technicalities, and to request resubmission. Also, the T/C reserves the right to accept all or any part of the bid and to increase or decrease quantities to meet additional or reduced requirements of the T/C. Any sole response received by the first submission date may or may not be rejected by the T/C depending on available competition and timely needs of the T/C.

For each item or for all items combined, the bid of the lowest, responsive, responsible bidder will be accepted, or the bidder who submits a bid that is in the best interest of the T/C, unless all bids are rejected. The **lowest responsible** bidder shall mean that bidder who makes the lowest bid to sell goods and/or services of a quality which conforms closest to the quality of goods and/or services set forth in the attached specifications or otherwise required by the T/C, and who is known to be fit and capable to perform the bid specifications as made. To be **responsive**, a bidder shall submit a bid that conforms in

all material respects to the requirements set forth in the Request for Proposal. To be a **responsible** bidder, the bidder shall have the capability in all respects to perform fully the contract requirements, and the tenacity, perseverance, experience, integrity, reliability, capacity, facilities, equipment, and credit which will assure good faith performance. Also, the T/C reserves the right to make such investigation as it deems necessary to determine the ability of any bidder to deliver the goods and/or services requested. Information the T/C deems necessary to make this determination shall be provided by the bidder. Such information may include, but shall not be limited to: current financial statements, verification of availability of equipment, personnel, past performance, capabilities and experience records

REIMBURSEMENTS

There is no express or implied obligation for the T/C to reimburse responding firms for any expenses incurred in preparing proposals in response to this Request for Proposal and the T/C will not reimburse responding firms for these expenses, nor will T/C pay any subsequent costs associated with the provision of any additional information or presentation, or to procure a contract for these services.

EQUAL OPPORTUNITY CLAUSE

The T/C Florida, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252) and the Regulations of the Department of Commerce (15 CFR, Part 8) issued pursuant to such Act, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this request for proposals, minority business enterprises will be afforded full opportunity to submit bids in response to this request for proposals and will not be discriminated against on the grounds of race, color, religion, sex, disability, sexual orientation, gender identity or expression, national origin, age, handicap or marital status in consideration for an award.

CONVICTED VENDOR LIST

In accordance with Section 287.133(2)(a), 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 bid, proposal or reply on a contract to provide any goods or services 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 (2) for a period of 36 months from the date of being placed on the convicted vendor list.

DRUG-FREE WORPLACE

Submit Drug-Free Workplace form. Failure to certify the firm has a drug-free workplace policy in accordance with 287.087, Florida Statutes, shall result in rejection or disqualification of the proposal.

NON-DISCRIMINATION OF EMPLOYMENT

Submit a Statement of Assurance for non-discrimination of employment (Form attached).

SCOPE OF SERVICES

The T/C will accept bids on the following sections. Bids should be broken down as to each section. Components of each package are described under Schedule B and samples are enclosed. Postage is not included and should be invoiced separately by the successful Bidder. Mail is sorted by zip code and discounted first class postage is used.

Bidder will produce and mail Real Estate tax bills, Tangible tax bills and Informational Notices for the T/C from information provided in a database format (DBF) file. The ***estimated quantities*** are: Annual Real Estate Tax Bills - **246,628**, Tangible Tax Bills – **20,000** and Informational Notices - **169,870**, for an ***estimated total of 436,498***. The thickness of the paper for tax bills is **24#**.

Multiple Tax Bills per owner must be merged. This is not a requirement for the Informational Notices. Multiple bill packages will increase the number of bills contained in one outgoing package, but not the number of envelopes or tax inserts. A larger outgoing envelope may be needed for multiple bill packages.

All Tax Bills or Informational Notices must be imaged using the laser printed format as shown on the sample provided, particularly the OCR font scan line on Tax Bills and Notices, the personalized information and special messages, and the postal bar code for mail sorting. (Note: Top section of Bill and Notice must be used for bar coding of address). Bidder must print instructional text (to be provided by T/C) in the last payment box of the Annual Bills and Notices, as well as text such as *Indicates Additional Owners when all owners cannot be printed on the bill/notice. In addition, Bidder is required to print the T/C's name and return with payment statement on each bill.

TAX BILL AND NOTICE PROCESSING - The planning timeline is both a manufacturing commitment of the Bidder and a commitment of the Orange County Tax Collector to provide information and materials needed to complete the project on time. Adherence to this schedule is of utmost importance to meet promised deliveries. The Bidder must understand the importance of meeting an October 31st mail date. By Statute, the Tax Collector must mail the tax bills within twenty (20) days of the Property Appraiser's certification of the tax roll.

January – Bidder provides data file for next birth month's tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

February – Bidder provides data file for next birth month's tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

T/C to provide current number of annual unpaid Property Tax Bills to Bidder. Bidder must order supplies as necessary for the Property Tax Bills, provide 100% electronic proofs of property tax reminders to OCTC for testing in Opex system and print property tax bill reminders for March 1st mailing.

March – Bidder provides data file for next birth month’s tag renewals within the first ten days of the month and Disabled Parking Permits.

April - Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

May – Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

T/C to provide Property Tax Installment file to bidder by mid-month. Bidder runs National Change of Address (NCOA) Software and receive USPS certification for data file. Print Property tax installments for mailing prior to June 1st.

June – Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

T/C to provide FINAL artwork for # 10 envelope, #9 remit envelope, Business Tax Backer Shell and all inserts. Confirm volume and forward to bidder by mid-month to perform NCOA update, create NCOA file. Bidder provides live proofs for T/C to test in Opex system and print Business Tax Renewals for mailing prior to July 1st.

Bidder must use National Change of Address (NCOA) Software to determine if a change of address is on file, and in those instances, the original Business Tax Bill must be updated and mailed to the address provided by NCOA. The estimated quantity of NCOA mailing is 75,000. The NCOA Bill must include a “special NCOA message” (provided by the T/C), and the outgoing envelope must include text on the front of the envelope to indicate an address change is needed per NCOA. Within one (1) week of the mailing referenced above, Bidder must provide T/C with a spreadsheet of all account numbers where the address was updated through NCOA, as well as the address that was used to mail the Tax Bill.

July - Bidder provides data file for next birth month’s tag renewals and Disabled Parking Permits.

August – Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

T/C to complete any changes to the design or materials for Property Tax Bills. Bidder to provide samples of changes to Property Tax Bills.

T/C provides Property Tax installment file to bidder by mid-month. Bidder prints property tax installments for mailing prior to Sept. 1st.

September - Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

T/C provides FINAL artwork for # 10 envelope, # 9 remit envelope, Backer Shell and all inserts for Property Tax Annual Bills (also used for reminders and installments). Approval of FINAL artwork and

entire packet for use with Property Tax Annual Bills by mid-Sept. Bidder to order supplies as necessary for the Property Tax Annual bills to be mailed prior to Nov. 1st.

October – Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

Bidder submits estimated postage which is paid by T/C mid-month. T/C to provide Property Tax Annual bill files to bidder by 20th of month. Bidder prints Property Tax Annual Bills for mailing prior to Nov. 1st.

November – Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

T/C provides Property Tax installment file to bidder by mid-month. Bidder runs NCOA and receives USPS certification for data file

December - Bidder provides data file for next birth month’s tag renewals within the first ten (10) days of the month and Disabled Parking Permits.

Tag renewals mailed for Mobile Homes by December 31st.

NOVEMBER ANNUAL BILL PROCESSING - SPECIFICATIONS

Components of the Annual Tax Bill Package and Information Notice include:

ANNUAL TAX BILL –

- * 8-1/2” X 11” – top 1/3 required perforation.
- * Personalized with Tax Collector’s name: Scott Randolph
- * Personalized instructional text & messages based on criteria furnished by Tax Collector
- * Presorted to the bar code level
- * OCR B font scan line

**INFORMATION
NOTICE -**

- * 8-1/2” X 11” –top 1/3 requires perforation
- * 70#, white offset stock
- * 1 color on face: PLUS Marginal words: red
- **DO NOT PAY – Contact your mortgage-holder to confirm payment will be made
- * Personalized with Tax Collector’s name: Scott Randolph
- * Personalized instructional text & messages based on criteria furnished by Tax Collector
- * Presorted to the bar code level.
- * OCR B font scan line

REPLY ENVELOPE -

- * #9, beige (PMS321U) colored envelope stock
- * Printed 1 color face, 1 color back: black text on colored paper envelopes

*Front must be personalized for Tax Collector and contain instructional text and graphics
*Back must contain instructional text and/or graphics on flap and below flap.

OUTGOING ENVELOPE-

*# 10, 24# white wove custom window (may use recycled)
*Front must be personalized for Tax Collector and contain instructional text and graphics, the envelope flap, and reminder information or internet addresses for County and State agencies below the flap.

*A larger outgoing envelope may be needed for multiple bill packages.

**Tax Collector reserves the right to add additional tax inserts of this approximate size if needed, the cost of which would be determined later; Tax Collector understands additional inserts could cause an increase in postage, which is to be invoiced separately.

FEBRUARY TAX BILL REMINDER STATEMENT - SPECIFICATIONS

Bidder will produce and mail Reminder Tax Bill Statements for T/C from information supplied via an.XML file containing taxpayer information. The quantity of Reminder Statements for 2017 was 51,711 Real Estate and 2,703 Tangible Reminder Statements.

Reminder Statement Bill Package consists of: Tax Bill
Reply Envelope
Outgoing Window Envelope

All tax bill information must be imaged using the laser printed format as shown on the sample provided, particularly the Bar Code, the personalized information, and the postal bar code for mail sorting. (Note: Top section of bill must be used for bar coding of address). Bidder must be able to print text such as *Indicates Additional Owners when all owners cannot be printed on the bill, and is required to print T/C's name and return with payment information on all bills.

Components of the February Bill Package include:

REMINDER STATEMENT-	*8 ½ X 11" with top 1 / 3 perforation *Personalized instructional text & messages based on criteria furnished by Tax Collector*Presorted to the bar code level *OCR B font scan line
REPLY ENVELOPE	*Same Reply Envelope used in November mailing
OUTGOING ENVELOPE	* Same Reply Envelope used in November mailing

NOTE: All forms in all Sections are subject to revision before final production. Changes from last year's samples are pending and may include changes in format or color, as well as verbiage

Changes to the insert(s), front and back of the bill(s) and informational notice, envelope(s), and /or change of address post card.

Reminder Tax Bill Statements required date of mailing at or around February 28th each year. Bidder will supply bill form and proofs to the Tax Collector on or about February 18th. Live data will be submitted approximately seven days before final production.

QUARTERLY INSTALLMENT STATEMENT – SPECIFICATIONS

Components of the Quarterly Installment Statement are the same as the components of the Annual Tax Bill Statement.

- | | |
|---------------------|--|
| REMINDER STATEMENT- | *8 ½ X 11” with top 1 / 3 perforation
*Personalized instructional text & messages based on criteria furnished by Tax Collector*Presorted to the bar code level
*OCR B font scan line |
| REPLY ENVELOPE | *Same Reply Envelope used in November mailing |
| OUTGOING ENVELOPE | * Same Reply Envelope used in November mailing |

NOTE: All forms in all Sections are subject to revision before final production. Changes from last year’s samples are pending and may include changes in format or color, as well as verbiage Changes to the insert(s), front and back of the bill(s) and informational notice, envelope(s), and /or change of address post card.

DHSMV RENEWAL NOTICE SPECIFICATIONS

Mailing:

1. An electronic file of the data for motor vehicles, boats and mobile homes will be provided by the Florida Department of Highway Safety and Motor Vehicles (DHSMV). The bidder is entirely responsible to have a working relationship with DHSMV to receive data.
2. The size and format of the notices are fixed and cannot be altered, unless approved by the Tax Collector. Samples of our current forms and inserts are supplied and identified in scheduled exhibits. Bidders are to use the same weight paper and color combinations in estimating costs (unless otherwise noted).

Note: The Tax Collector reserves the right to change the design and/or verbiage on renewal notices, inserts, envelopes and customized special messages at any time during the term of the contract.

3. The estimated quantities of renewal notices to be produced and mailed are:
 - a. Birth month (*Vehicle/boat*) 80,000 approximately per month
 - b. Commercial 14,500 approximately per year
 - c. Mobile Home.....12,000 approximately per year
 - d. Heavy Truck.....60,000 approximately per year

4. Specifics for each mailing are outlined in the attached schedule, but can change in future years based on legislative, technological or procedural changes, which must be approved by the Tax Collector.

The proposing provider will designate an account executive and alternate. The designated account executive must have the authority to make timely decisions and to contractually bind the bidder based on oral statements relating to capacity, ability and scheduling. The project manager may be the same person as the account executive or may be separate individual(s) based on the nature of the mailing project. The provider may change any of these individuals at their discretion with at least 2 weeks notification to the T/C.

The T/C must approve all inserts; therefore, only the T/C or an organization approved by the T/C may provide inserts.

For each monthly mailing, the T/C or his designee must sign off their approval of the final typeset proof of all printed forms, envelopes, inserts, etc. before any are printed for the mailings. Only the version approved will be accepted for printing. In addition, a signed approval will be required for sample of the form with real data printed on it before all notices are printed. Bidder accepts liability, both public and financial, for improperly printing or mailing unapproved or erroneous material.

RENEWAL NOTICE PACKAGE

Bidder is responsible for complying with all changes made by the T/C, legislation or State Agency procedures in a timely manner. The bidder will accommodate these changes as directed by the T/C.

- I. The mailings consist of:
 - A. Birth Month (Vehicle/Boat)
These mailings occur monthly and are generally mailed at the beginning of the month, one (1) month prior to expiration.
 - B. Commercial
These mailings occur once annually and are generally mailed in May, as directed by the T/C.
 - C. Mobile Home
These mailings occur once annually and are generally mailed in October at the beginning of the month, based on Zip Code, as directed by the T/C.
 - D. Heavy Truck
These mailings occur once annually and are generally mailed in October at the beginning of the month, as directed by the T/C.

II. The current renewal package consists of the following:

A. Renewal Notice(s)

- a. 8 ½"X 11", up to three (3) renewal notices per sheet, heavily perforated, 60#, white offset stock
- b. Two-color non-laser (static) information provided by T/C. Bidder and T/C, or his designee, will determine quantity of forms to be preprinted, but not more than a six (6) month supply. Bidder will contact the project manager two (2) months before the supply of renewal notices will be exhausted to determine if any changes need to be made prior to printing additional forms. T/C will utilize the preprinted form until supply is exhausted, or will pay bidder for cost of unused remainder of design.
- c. Variable data will be made available by electronic file from the Department of Highway Safety and Motor Vehicles. Bidder is responsible for contacting DHSMV to determine file format and timing of files submitted. T/C wants to ensure the most current information on the renewal notices. Therefore, the bidder will need to determine the latest date possible to receive the file from DHSMV.
- d. Variable customized special messages laser printed on the renewal notices, will be made available by the T/C based on criteria in the data.
- e. OCR 12pt font scan line will be of the quality and position to ensure a maximum scanning success rate. The documents are read by an OPEX 3270 remittance processor.
- f. Multiple renewal notices for the same owner, when applicable will be printed on the same sheet. If the owner has multiple pages of renewal notices, the notices should be mailed together in the same envelope or package, to reduce forms and postage costs.
- g. Owners with less than three (3) renewal notices (or multiples of 3 renewal notices) will have static messages printed on the "blank" sections, as determined by the T/C.
- h. The cost for renewal notice(s) must be included in the bid price.

B. Standard Inserts

- a. The standard inserts that will be provided to the bidder are:
 - i. Renew Online for birth month and commercial mailings
 - ii. Mobile Home for mobile home mailings
 - iii. Heavy Truck for heavy truck mailings
- b. T/C, his designee, or a 3rd party vendor will provide a supply of standard inserts to the bidder, but not more than a three (3) month supply.
- c. Bidder will contact the project manager forty-five (45) days before the supply of standard inserts will be exhausted.
- d. The cost for insertion of standard inserts must be included in the bid price.

Special Inserts - With each birth month renewal mailing, the bidder may be required to include a special insert in addition to a standard insert (up to 8 ½" X 3 2/3").

- e. Special inserts will be supplied to the bidder by the Tax Collector or an organization approved by the T/C at least six (6) weeks prior to the scheduled mailing date.
- f. The cost for insertion of special inserts provided by another organization will be paid by that organization.
- g. The cost for insertion of special inserts provided by the T/C must be itemized on the T/C's monthly bill.

C. #9 Reply Envelope

- a. Light blue Standard reply envelope
- b. Black customized text on front and back based on the mailing
- c. Bidder and T/C, or his designee, will determine quantity of envelopes to be preprinted, but not more than a six (6) month supply. Bidder will contact the project manager two (2) months before the supply of #9 reply envelopes will be exhausted to determine if any changes need to be made prior to printing additional envelopes. T/C will utilize the preprinted envelope until supply is exhausted, or will pay bidder for cost of unused remainder of design.

PROPOSAL PROCESS AND TIMETABLE

The T/C's current contract for printing services expires on January 5, 2018. The T/C has issued a timeline for the RFP, allowing the proposing bidder time for response and sufficient time for the RFP committee to efficiently review the responses and grade them based on merit and costs. Below are the guidelines for the submission and review process.

Pre-Proposal Conference:

A pre-proposal conference has been scheduled for January 5, 2018 at 10 A.M. in the conference room located at 200 S. Orange Avenue, 15th floor, Orlando, Florida at the T/C's office. The conference will provide prospective responders an opportunity to ask questions and/or receive clarification of any requirements in the RFP regarding the selection process. Attendance at the conference is not mandatory, but highly recommended. If you are unable to attend the pre-proposal conference or would like to submit questions to be discussed in the pre-proposal conference, please submit in writing (U.S. Mail) to:

Cindy Valentine, Assistant Tax Collector
Office of the Orange County Tax Collector
200 S. Orange Avenue, 16th Floor
Orlando, FL 32801
Email: cvalentine@octaxcol.com

All questions must be received by 4:00 p.m., January 2, 2018.

DATE	EVENT
December 18, 2017	Release of RFP
January 2, 2018	Submission of RFP Questions
January 5, 2018	Pre-Proposal Conference, 10:00 am – Conference Room, 15 th floor, 200 S. Orange Ave., Orlando, FL – Tax Collector’s office
January 19, 2018	Submission of RFP
January 26, 2018	Selection of RFP Finalists
February 2, 2018	General Presentation by Finalists
February 9, 2018	Selection of Service Provider/Written notification to winner

Selection Criteria

The following criteria will be used during evaluation of the bids:

- Complete response to all required items contained on the standard forms
- Services cost, per identified activity
- Ability to provide forms and formats as requested
- Ability to meet current and future service requirements
- Demonstrate ability to have successfully completed jobs of similar magnitude in the past
- Compliance with all Federal, State and Local regulations
- Ability and willingness to conform to unavoidable delays in mailing schedule
- Demonstrate commitment to proactively bring innovative technology and solutions to T/C’s office
- Demonstrate commitment to ensure T/C is using most cost-effective methods of fulfilling its duties to Orange County taxpayers

TERMS AND CONDITIONS

Bids must be submitted on attached T/C forms, although additional information may be attached. Bidders must indicate any variances from the T/C’s requested specifications, terms and conditions, otherwise, bidders must fully comply with the T/C’s requested specifications, terms and conditions. Bidder’s failure to meet the deadlines set forth within the Planning and Timeline will result in a reduction in the bid price of up to fifty percent (50%), said percentage to be decided by the T/C. Alternate bids may or may not be considered at the sole discretion of the T/C.

BILLING

Billing must include a detailed breakdown monthly, consisting of the number of renewal notices (not the number of forms) the price per notice, the number of inserts, the price per insert (if applicable), the number of envelopes mailed and the postage cost (which is included in the price per notice). All postage will be billed separately.

TIME AND DATE DUE

The Orange County Tax Collector will receive sealed bids until 3 P.M. on January 19, 2018.

OPENING LOCATION

All bids will be opened at the office of the Orange County T/C, SunTrust Tower, 200 South Orange Ave., Suite 1500, Orlando, FL 32801 at the above time and date.

DELIVERY REQUIREMENTS

Any bids received after the above stated time and date will not be considered. It shall be the sole responsibility of the bidder(s) to have their bid(s) delivered to the T/C for receipt on or before the above stated time and date. If a bid is sent by U.S. Mail, the bidder shall be responsible for its timely delivery to the T/C. Bids delayed by mail shall not be considered, shall not be opened at the public opening, and arrangements shall be made for their return at the bidder's request and expense. Bids may not be submitted by email.

CLARIFICATION AND ADDENDA

Each bidder shall examine all Requests for Proposal documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the Request for Proposal shall be made through the T/C's office. The T/C shall not be responsible for oral interpretations given by any T/C employee, representative, or others. The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given. If any addenda are issued to this Request for Proposal, the T/C will attempt to notify all prospective bidders who have secured same. However, it shall be the responsibility of each bidder, prior to submitting their bid, to check the T/C's website, to determine if addenda were issued and to make such addenda a part of their bid.

SEALED AND MARKED

Three (3) signed copies of your bid shall be submitted in one sealed package, clearly marked on the outside:

“SEALED BID # TC-PUR-121817-DP- OFFICIAL DOCUMENT PRINTING PACKAGE”

And addressed to: **Orange County Tax Collector**
200 S. Orange Ave., Ste. 1600
SunTrust Tower
Orlando, FL 32801
Attn: Cindy Valentine, Assistant Tax Collector

LEGAL NAME

Bids shall clearly indicate the legal name, address and telephone number of the bidder (company, firm, partnership, individual). Bids shall be signed above the typed or printed name and title of the signer. The signer shall have the authority to bind the bidder to the submitted bid.

IRREVOCABLE OFFER

Any bid may be withdrawn up until the date and time set above for opening of the bid. Any bid not so withdrawn, shall upon opening, constitute an irrevocable offer for a period of sixty (60) days to sell to the Orange County T/C the goods and/or services set forth in the attached specifications until one or more of the bids have been duly accepted by the T/C.

COLLUSION

By offering a submission to this invitation to bid certifies that the bidder has not divulged to, discussed or compared its bid with other bidders and has not colluded with any other bidder or parties to this bid whatsoever. Also, bidder certifies, and in the case of a joint bid, each party thereto certifies as to its own organization.

- a. Any prices and/or cost data submitted have been arrived at independently, without consultation, communication, or agreement, restricting competition, as to any matter relating to such prices and/or cost data, with any other bidder or with any competitor.
- b. Any prices and/or cost data quoted for this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to the scheduled opening, directly or indirectly, to any other bidder or to any competitor.
- c. No attempt has been made or will be made by the bidder to induce any other person or firm to submit or not submit a bid for the purpose of restricting competition.
- d. The only person, persons, principal or principals interested in this bid is/are named therein and that no person or principal other than therein mentioned has any interest in this bid or in the contract; and
- e. No person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee accepting bona fide employees or established commercial agencies maintained by the bidder for the purpose of doing business.

CONTRACT FORMS, TERM, EXTENSION

Any agreement, contract or purchase order (hereinafter "agreement") resulting from the acceptance of a bid shall be on forms approved by the T/C. The term for any such agreement shall be three (3) years, and at the discretion of the T/C, the agreement can be extended on a yearly basis, provided the price per unit does not increase more than two (2%) per year.

INDEMNIFY

After notification of award, the successful bidder shall indemnify and hold harmless the T/C from and against all claims, suits, actions, damages or causes of action arising during the terms of the resulting agreement for any personal injury, loss of life or damage to property sustained by reason or as a result of the performance of the services or delivery of goods for which the resulting agreement was entered into, or its agents, employees, invitees, and all other persons, and from and against any orders, judgments, or decrees, which may be entered thereto, and from and against all costs, attorney's fees, expenses and liabilities incurred in or by reason of the defense of any such claim, suit or action, and the investigation thereof. Nothing in the award, resulting agreement, and contract or purchase order shall be deemed to affect the rights, privileges and immunities of the T/C as set forth in F.S. 768.28.

The successful bidder(s) covenants and agrees to indemnify and hold harmless the T/C of Orange County, Florida, and to defend him from all costs, expenses, damages, attorney's fees, injury or loss, to which the T/C may be subjected by any person, firm, corporation or organization by reason of any wrongdoing, misconduct, want or need of care or skill, negligence or default or breach of contract, guaranty or warranty, by the successful bidder(s), his employees, his agents or assigns.

CAPABILITIES

What equipment would you use to produce the bills and notices? _____

What production capabilities does this equipment have? Bills/Shift or per hour? _____

How many of these units do you have? _____

What inserting capabilities do you have? _____

What service agreement or in-house engineering staff provides for care of the equipment? _____

What contingency plans area are in effect if the production equipment is down? _____

What data processing system do you operate? _____

May we tour your operation center? _____

What storage capabilities do you have? _____

What postal sorting capabilities can you offer
? _____

Do you have the ability to provide tax bills to selected accounts via email, per F.S. 197? _____

List three (3) references where you have produced OCR scanned documents;

List any references where you have provided tax bills or invoices to selected accounts via email.

EXPERIENCE

How long have you been in business? _____

How long has the representative of the account been with your company? _____

Can you provide an audited financial statement or your most recent annual report? _____

Are you approved by the Florida Department of Revenue and with the Florida Department of Motor Vehicles to provide Florida Tax Collectors with Electronic Data Processing Services? _____

If applicable, please describe any third party vendors you may use.

Please list three (3) similar projects you have handled before, together with the customer's name, contact person and the telephone number _____

Have you ever done business with any Florida Tax Collector? _____ if so, please list the county below:

BID RESPONSE

TO: Orange County Tax Collector
Attn: Cindy L. Valentine
SunTrust Tower
200 S. Orange Avenue, 16th FL
Orlando, FL 32801

We, the undersigned, hereby declare that we have carefully reviewed the bidding documents and with full knowledge and understanding of the afore mentioned, and specifications attached hereto, herewith submit our bid.

Please print legibly or type the following:

Company Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Fax: _____

E-mail: _____

Website URL: _____

PROFORMA

We hereby agree to comply with all Specifications, including the Planning Schedule, outlined in the 2017 Request for Proposal. *We further agree to a reduction in the bid price shown below, percentage to be decided by the Tax Collector, should we fail to meet any deadlines as set forth in said Planning Schedule.* Attached to this Bid Response are the Capabilities and Experience Questionnaires. We hereby declare that all information set forth therein is true and correct to the best of our knowledge.

We hereby agree to advise the Orange County Tax Collector’s Office of any changes or delays which may result in additional charges, and to obtain written approval of the Orange County Tax Collector before proceeding thereafter.

Annual	Form Type	Price	Price with Envelopes*
445,000	Tax bills and information notices		
54,000	Reminder Notice		
75,000	Business Tax Bills		
6,000	Quarterly Installment Bills		
684,000 (80,000/month)	Birth month, vehicle, boat and mobile home notice		
60,000	Heavy Trucks		
145,000	Commercial vehicles		
12,000	Mobile Home Notice(s)		

*Price with envelopes requires bidder to supply envelopes.

Detail costs for any items not listed above but may include programming fees, inserts, etc.

STATEMENT OF ASSURANCE NON- DISCRIMINATION

The undersigned proposing Contractor certifies he/she will not and does not discriminate against any employee or applicant for employment because of race, color, religion, sex, disability, sexual orientation, gender identity or expression, national origin, age, handicap or marital status. The proposing Contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, disability, sexual orientation, gender identity or expression, national origin, age, handicap, or marital status. Such action shall include, but not be limited to the following: employment, upgrading, demotion or transfer, recruitment advertising, layoff or termination, rate of pay or other forms of compensation and selection for training, including apprenticeship.

The proposing bidder agrees to post in conspicuous places, available to employees and applicants for employment, notice setting for the provisions of this non-discrimination clause. The proposing provider shall give assurance by means of inspection or otherwise that he/she is compliant with this action.

The proposing bidder assures the T/C that said firm is compliant with the above and with all applicable laws concerning discrimination, and the proposing provider understands that this Agreement is conditioned upon the veracity of the Statement of Assurance.

(Proposing Contractor's Name)

(Authorized Signature)

(Printed/Typed Name)

(Title)

(Date)

DRUG-FREE WORKPLACE STATEMENT

The undersigned bidder, in accordance with Florida Statute 287.087, hereby certifies that _____ does:

(Name of business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, employee assistance programs and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid, a copy of the statement specified in Paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Florida Statute 893 or of any controlled substance law of the United States or any State, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee’s community, by an employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Paragraphs 1 thru 5.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

(Bidder’s Signature)

(Date)

CONVICTED VENDOR STATEMENT

The undersigned bidder certifies it is in compliance with Florida Statute 287.133 which states 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 bid, proposal or reply on a contract to provide any goods or services to a public entity, may not be awarded or perform work as a contractor, supplier, sub-contractor, 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 II for a period of 36 months from the date of being placed on the convicted vendor list.

Proposing bidder understands and acknowledges that any misstatement or lack of compliance with the Statute shall result in the contract being declared null and void and/or subject to immediate termination. In the event of such termination, the Tax Collector shall not incur any liability for termination of the contract.

(Company name)

(Authorized Signature)

(Printed/Typed Name)

(Title)

(Date)

WITHDRAWAL REQUEST FORM

We have declined to submit a bid on this RFP, REQUEST FOR PROPOSAL, NO. TC-PUR-121817-DP, Official Document Printing. We are returning this form, duly signed, along with the entire proposal package.

The reason for our decline is as follows:

(Company Name)

(Authorized Signer)

(Printed/Typed Name)

(Title)

(Date)