



RFP #716  
PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

---

Clark County Washington  
Release date: Wednesday, September 21, 2016

Request for Proposal for:

## Property Account Statement Production and Mailing Services

**PROPOSALS DUE: Wednesday, October 19, 2016 by 3:00 p.m.**

**Proposal(s) shall be sealed and clearly marked on the package cover with RFP #715 and Project Title.**

**Submit one (1) original and three (3) complete copies of the Proposal to:**

Clark County  
Office of Purchasing  
P.O. Box 5000  
1300 Franklin Street, 6<sup>th</sup> Floor, Suite 650  
Vancouver, Washington 98660  
(360) 397-2323

Refer Questions to:

Project Manager  
Rachel Belveal  
Clark County Treasurers' Office  
Rachel.Belveal@clark.wa.gov

## General Terms and Conditions

**ADMINISTRATIVE REQUIREMENTS** - Contractors shall comply with all management and administrative requirements established by Washington Administrative Code (WAC), the Revised Code of the State of Washington (RCW), and any subsequent amendments or modifications, as applicable to providers licensed in the State of Washington.

ALL proposals submitted become the property of Clark County. It is understood and agreed that the prospective Proposer claims no proprietary rights to the ideas and written materials contained in or attached to the proposal submitted. Clark County has the right to reject or accept proprietary information.

**AUTHORSHIP** - Applicants must identify any assistance provided by agencies or individuals outside the proposers own organization in preparing the proposal. No contingent fees for such assistance will be allowed to be paid under any contract resulting from this RFP.

**CANCELLATION OF AWARD** - Clark County reserves the right to immediately cancel an award if the contractual agreement has not been entered into by both parties or if new state regulations or policy make it necessary to change the program purpose or content, discontinue such programs, or impose funding reductions. In those cases where negotiation of contract activities are necessary, Clark County reserves the right to limit the period of negotiation to sixty (60) days after which time funds may be unencumbered.

**CONFIDENTIALITY**: Proposer shall comply with all applicable state and federal laws governing the confidentiality of information."

**CONFLICT OF INTEREST** - All proposals submitted must contain a statement disclosing or denying any interest, financial or otherwise, that any employee or official of Clark County or the appropriate Advisory Board may have in the proposing agency or proposed project.

**CONSORTIUM OF AGENCIES** - Any consortium of companies or agencies submitting a proposal must certify that each company or agency of the consortium can meet the requirements set forth in the RFP.

**COST OF PROPOSAL & AWARD** - The contract award will not be final until Clark County and the prospective contractor have executed a contractual agreement. The contractual agreement consists of the following parts: (a) the basic provisions and general terms and conditions, (b) the special terms and conditions, (c) the project description and goals (Statement of Work), and (d) the budget and payment terms. Clark County is not responsible for any costs incurred prior to the effective date of the contract. Clark County reserves the right to make an award without further negotiation of the proposal submitted. Therefore, the proposal should be submitted in final form from a budgetary, technical, and programmatic standpoint.

**DISPUTES**: Clark County encourages the use of informal resolution to address complaints or disputes arising over any actions in implementing the provisions of this RFP. Written complaints should be addressed to Clark County – Purchasing, P.O. Box 5000, Vancouver, Washington 98666-5000.

**DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS** - It is the policy of Clark County to require equal opportunity in employment and services subject to eligibility standards that may be required for a specific program. Clark County is an equal opportunity employer and is committed to providing equal opportunity in employment and in access to the provision of all county services. Clark County's Equal Employment Opportunity Plan is available at <http://www.clark.wa.gov/hr/documents.html>. This commitment applies regardless of race, color, religion, creed, sex, marital status, national origin, disability, age, veteran status, on-the-job injury, or sexual orientation. Employment decisions are made without consideration of these or any other factors that are prohibited by law. In compliance with department of Labor Regulations implementing Section 504 of the rehabilitation Act of 1973, as amended, no qualified handicapped individual shall be discriminated against in admission or access to any program or activity. The prospective contractor must agree to provide equal opportunity in the administration of the contract, and its subcontracts or other agreements.

**ENVIRONMENTALLY RESPONSIBLE PURCHASING PROGRAM** - Clark County has implemented an Environmentally Responsible Purchasing Policy with a goal to reduce negative impacts on human health and the environment. Negative environmental impacts include, but are not limited to, greenhouse gases, air pollution emissions, water contamination, waste from the manufacturing process and waste in packaging. This policy also seeks to increase: 1) water and energy efficiency; 2) renewable energy sources; 3) use of products with recycled content; 4) product durability; 5) use of products that can be recycled, reused, or composted at the end of its life cycle. Product criteria have been established on the Green Purchasing List <http://www.clark.wa.gov/general-services/purchasing/erp/environmental.html>

**INDEPENDENT PRICE DETERMINATION** - The prospective contractor guarantees that, in connection with this proposal, the prices and/or cost data have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition. This does not preclude or impede the formation of a consortium of companies and/or agencies for purposes of engaging in jointly sponsored proposals.

**INTERLOCAL AGREEMENT** - Clark County has made this RFP subject to Washington State statute RCW 39.34. Therefore the bidder may, at the bidders' option, extend identical prices and services to other public agencies wishing to participate in this RFP. Each public agency wishing to utilize this RFP will issue a purchase order (or contract) binding only their agency. Each contract is between the proposer and the individual agency with no liability to Clark County.

**LIMITATION** - This RFP does not commit Clark County to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or contract for services or supplies.

**LATE PROPOSALS** - A proposal received after the date and time indicated above will not be accepted. No exceptions will be made.

**ORAL PRESENTATIONS**: An oral presentation may be required of those prospective contractors whose proposals are under consideration. Prospective contractors may be informed that an oral presentation is desired and will be notified of the date, time and location the oral presentation is to be conducted.

**OTHER AUDIT/MONITORING REQUIREMENTS** - In addition, auditing or monitoring for the following purposes will be conducted at the discretion of Clark County: Fund accountability; Contract compliance; and Program performance.

**PRICE WARRANT** - The proposal shall warrant that the costs quoted for services in response to the RFP are not in excess of those which would be charged any other individual or entity for the same services performed by the prospective contractor.

**PROTESTS** must be submitted to the Purchasing Department.

**REJECTION OF PROPOSALS** - Clark County reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with any or all prospective contractors on modifications to proposals, to waive formalities, to postpone award, or to cancel in part or in its entirety this RFP if it is in the best interest of Clark County to do so.

**SUBCONTRACTING** - No activities or services included as a part of this proposal may be subcontracted to another organization, firm, or individual without the approval of Clark County. Such intent to subcontract shall be clearly identified in the proposal. It is understood that the contractor is held responsible for the satisfactory accomplishment of the service or activities included in a subcontract.

**VERBAL PROPOSALS**: Verbal proposals will not be considered in making the award of any contract as a result of this RFP.

**WORKERS COMPENSATION INSURANCE** – The contractor shall comply with R.C.W. Title 51- with minimum coverage limits of \$500,000 for each accident, or provide evidence that State law does not require such coverage.

**FOR ALTERNATIVE FORMATS**  
**Clark County ADA Office; V (360) 397-2025;**  
**TTY (360) 397-2445; [ADA@Clark.wa.gov](mailto:ADA@Clark.wa.gov)**

Request for Proposal # 716  
Property Account Statement Production and Mailing Services

Request for Proposals  
Table of Contents

|          |  |
|----------|--|
| PART I   | PROPOSAL REQUIREMENTS                            |
|          | Section IA: General Information                  |
|          | 1. Introduction                                  |
|          | 2. Background                                    |
|          | 3. Scope of Project                              |
|          | 4. Project Funding                               |
|          | 5. Timeline for Selection                        |
|          | Section IB: Work Requirements                    |
|          | 1. Required Services                             |
|          | 2. County Performed Work                         |
|          | 3. Deliverables and Schedule                     |
|          | 4. Place of Performance                          |
|          | 5. Period of Performance                         |
|          | 6. Public Safety                                 |
|          | 7. Insurance/Bond                                |
|          | 8. Plan Holders List                             |
|          | 9. Property Procurement and Management           |
|          | 10. Prospective Contractor's Administration      |
|          | 11. Audit Requirements                           |
| PART II  | PROPOSAL PREPARATION AND SUBMITTAL               |
|          | Section IIA: Pre-Submittal Meeting/Clarification |
|          | 1. Pre-Submittal Meeting                         |
|          | 2. Proposal Clarification                        |
|          | Section IIB: Proposal Submission                 |
|          | 1. Proposals Due                                 |
|          | 2. Proposal                                      |
|          | Section IIC: Proposal Content                    |
|          | 1. Cover Sheet                                   |
|          | 2. Project Team                                  |
|          | 3. Management Approach                           |
|          | 4. Respondent's Capabilities                     |
|          | 5. Project Approach and Understanding            |
|          | 6. Proposed Cost                                 |
| PART III | PROPOSAL EVALUATION & CONTRACT AWARD             |
|          | Section IIIA: Proposal Review and Selection      |
|          | 1. Evaluation and Selection                      |
|          | 2. Evaluation Criteria Scoring                   |
|          | Section IIIB: Contract Award                     |
|          | 1. Consultant Selection                          |
|          | 2. Contract Development                          |
|          | 3. Award Review                                  |
|          | 4. Orientation/Kick-off Meeting                  |

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

- ATTACHMENTS
- A: Proposal Cover Sheet
  - B: Letter of Interest
- EXHIBITS
- A: Clark County Statement Data File Layout
  - B: OCR Scanline Configuration
  - C: OCR and Barcode Font Specifications
  - D: Statement Samples
    - D1: 1<sup>st</sup> Half Property Account Statement
    - D2: 2<sup>nd</sup> Half Property Account Statement
    - D3: Corrected Statement Form
    - D4: Corrected Property Account Statement
  - E: Statement Form Specifications
  - F: Envelope Specifications
  - H: Calendar of Responsibility
  - J: Clark County Assessor's Office Specifications
  - K: NCOA Export Sample
  - L: NCOA Import Sample

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

### Part I Proposal Requirements

#### Section IA General Information

1. Introduction This RFP is to permit the appropriate consultant community to suggest various approaches to meet the 'defined need' at a given price.
- The Clark County Treasurer (Treasurer) performs the functions of treasury management for Clark County, the State of Washington, and cities and towns within Clark County and all junior taxing districts i.e. fire, port, school, etc. within the County. The Treasurer collects property taxes, assessments, and fees and distributes them to their appropriate fund.
- The intent of the following specifications is to describe the products and services to be provided to the Treasurer's Office for printing, insertion and mailing of property account statements, inclusive of real and personal property taxes, special assessments and other fees and charges. The services requested include: development and production of property tax account statement forms and inserts; creation and mailing of information only tax postcards; printing of all envelopes; and development and delivery of individual PDF files allowing for statement images to be attached to the property account for customer viewing on our website. Further descriptions of each of the services are contained within this document.
- The Clark County Treasurer is also requesting detail on the ability and cost to present electronic bills on behalf of Clark County to registered taxpayers as a potential future service during the life of this contract. This includes email or SMS/text message notifications when new bills are available, an image that exactly replicates the printed statements, the ability to notify registered taxpayers of the approaching due date, and delinquency reminders after the due date.
2. Background The Clark County Treasurer provides two notifications per year regarding property taxes. There are two types of printed notification, which can include informational inserts as well as return forms and envelopes. The Treasurer also offers an optional electronic notification for enrolled customers.
- The Treasurer sends notifications related to value and status changes throughout the year. The printing and mailing is completed internally, but the printable form is currently produced by the print vendor.
3. Scope of Project The intent of the following specifications is to describe all products and services required to be provided to the Treasurer's Office for form creation, printing, stuffing and mailing of property account statements, inclusive of real and personal property taxes, informational inserts and envelopes. The vendor services required include: creation of property tax and assessment forms, informational only postcards, information flyer inserts, envelopes, individual .pdf images which allow attachment to the property account for viewing via Clark County's website; printing property tax statements and information postcards from the statement data file; folding, stuffing and mailing; potential future services could include electronic delivery of the property tax statement to customers, allowing the Treasurer to notify customers of new bills, upcoming due dates, delinquent reminders via email or SMS text. Further descriptions of each of the services are contained within this document.

#### General

The Treasurer currently notifies all property owners of taxes due for Real Property, Mobile Home Property, and Personal Property, by February 15 of each year using one statement with one stub as exemplified in **Exhibit D.1** The stub shows the full amount of taxes, fees, and assessments due April 30, but provides for the property tax owner to pay one-half of such amount provided it is greater than \$50.00. In September of each year, a statement for a second half is sent to all taxpayers with an amount still owing (**Exhibit D.2**). This includes Real, Foreclosure, Mobile Home, and Personal Property taxes with all special assessments included. In 2015, 174,000 Real Property account statements, 12,000 Personal Property account statements, and 1,600 Real Property Foreclosure account statements were prepared and mailed.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

Informational only postcards are sent to all customers who use a mortgage company to remit payment on the above taxes, fees, and assessments to the Treasurer's Office. The purpose of the informational postcard is to let property owners know a mortgage company has indicated to the Treasurer's Office their intent to pay taxes on behalf of the owner. The owner is given an opportunity to obtain a duplicate tax statement if there is an error and they are responsible for the tax payment. These postcards are mailed the same time as statements, with up to 1 week lag if needed. In 2015, 150,000 postcards were sent (approximately 75,000 in the 1<sup>st</sup> half and 75,000 in the 2<sup>nd</sup> half). Property account statements are only sent to customers responsible for paying their own taxes rather than utilizing a mortgage company.

The Treasurer, throughout the year, sends property account statements to customers that experience a value adjustment, ownership transfer or change, removal of exempt status, or a property classification change. Currently Clark County utilizes a standardized form (**Exhibit D.3**) to create these types of statements. These statements, known as corrected statements (**Exhibit D.3**), are generated in-house, using a form created by the vendor. The Treasurer would like to include an optional service for printing and mailing corrected statements when the jobs exceed 2,000 account or statement records.

### Specifications

Statistics contained in this RFP are intended to provide as much information as possible to bidders regarding the volume of statements and the required data elements. Additionally, this RFP includes current tax statements examples to provide bidders with the minimum information required to be presented on the statements. Currently the Treasurer's Office prints all statements on white paper with colored ink. The OCR Scanline and barcode must always be printed in black, using non-magnetic ink. A sample file can be made available to requesting bidders to determine the feasibility of extracting data.

The vendor is required to provide the Treasurer with a calendar of jointly agreed upon dates detailing when specific tasks will be accomplished. Specifically, the bid and any ensuing contract must detail the timeline for ensuring the printing and mailing of postcards and statements to the taxpayer by February 14<sup>th</sup> and September 15<sup>th</sup> for each year of the contract.

The Treasurer and vendor must agree upon specific mailing dates at the beginning of each contract year. Such dates will be consistent with the aforementioned dates. **Exhibit H** sets forth the Treasurer's proposed target dates and/or deadlines for printing, layout, design, collating, stuffing and mailing of the statements.

The vendor will provide the Treasurer with an invoice of itemized services. The invoice must be provided within 15 calendar days after the month of service. The invoice must be itemized by bill type and include per unit costs for printing, mail preparation, postage, and all associated charges or fees.

The Treasurer, County Auditor, and/ or Washington State Auditor and their respective representatives or third parties authorized by the Treasurer, County Auditor, or Washington State Auditor, shall have the right to examine any records that support these monthly statements. These itemized invoices (monthly statement) are to be paid within 30 days of receipt provided the services are performed as outlined in this bid document and associated contract.

With respect to postage, the vendor shall provide the estimated costs prior to the statements and postcards being presorted. The Treasurer will then secure a warrant made payable to the vendor for the estimated postage amount. The Treasurer requires estimated postage costs to be submitted a minimum of four weeks prior to the mailing date in order to generate a warrant to be delivered to the vendor. The vendor is responsible for producing a report upon printing of the statements reflecting the actual count and dollar amounts for the various mailing breakdowns, e.g. pre-sort and/or invalids. The current process utilizes a non-area identification permit stamp for postage. This allows for statements to be mailed from the vendor's area or location. Each statement type must be mailed first class. Once the statements and postcards are mailed, the vendor must refund any postage overage or bill any remaining postage costs.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

The vendor must retain all records related to the performance of this contract for the period required by Washington State Law, six years. The Treasurer and/or his representatives and third parties authorized by the Treasurer shall have the right to examine these records at all reasonable times during this period.

The vendor shall submit to the Treasurer 500 copies of printed property account statements for testing as to the readability of the OCR line, the barcode, positioning of printing on the front and back of all statements, and the efficiency with which the paper travels through the remittance processing equipment. This print sample will consist of 300 real property tax, 50 foreclosure statements, and 150 personal property tax statements. These samples will include statements with both current year amounts due as well as delinquent amounts due. Most of the samples will be randomly chosen from within the files, but the Treasurer may choose to provide a list of specific property identification numbers or property account numbers it wants included. The test must be successful in order to proceed with the printing and mailing of statements. Production of sample documents must be completed in a manner that replicates precisely how the documents will be created in production. All test documents must be produced on the equipment to be used to create the documents in production. Test documents will be forwarded to the Treasurer, along with a written statement, detailing the equipment utilized for testing and confirming that the same equipment will be used during production.

The successful respondent and the Treasurer will enter into a contract, which incorporates the fees and requirements of this RFP.

### **Property Account Layout, Printing and Mailing**

**Exhibit A** provides, in detail the data extraction configurations, which are necessary for the proper positioning of information contained on the various property account statements. The data will be provided to the vendor in an electronic format via FTP files. In addition, formatted property account statement files can be supplied to the vendor for testing. Test results should be submitted to the Treasurer for review and acceptance or correction. As noted in **Exhibit E**, the Treasurer requires the use of NON-Magnetic Ink and recycled paper for the printing of flyers and return envelopes. Property account statements **cannot** be printed on recycled paper. Property account statements must have a thickness of .005", have a smoothness of more than 200 Sheffield Flow Units, and have a stiffness of 60 to 100 mg (Gurley). Paper specifications are as follows; 8 ½ " x 11", "cut stock 11" or 14" on long grain, thermal inks, MICR White 17.5, 24# stock, Laser Perf Position 3 2/3" from bottom. Perf is 40(cut/inch), minimum 12 ½ lbs. /inch.

**Exhibit D** provides an example of property account statements for the following types of statements:

|   |             |
|---|-------------|
| Generic Form for Statement                      | Exhibit D.3 |
| 1 <sup>st</sup> Half Property Account Statement | Exhibit D.1 |
| 2 <sup>nd</sup> Half Property Account Statement | Exhibit D.2 |
| Corrected Property Account Statement            | Exhibit D.4 |

Each statement has preprinted information contained thereon. The vendor shall incorporate such information on the respective statement and should be capable of duplexing. Printing on the back of the statement shall be positioned as agreed upon during layout detailing with the Treasurer's office and must accommodate spacing for information to be inserted on the back of the Treasurer's remittance copy from the Treasurer's remittance processing equipment. Measurements for the clear spaces are as follows:

Beginning 1" from the top of each payment stub, extended down ½" the space being from 1" to 1 ½" from the top of the stub.

The bottom clear space is from the bottom of each stub up 2/3".

Additionally, the County may include informational material on such subjects of interest to the residents of Clark County. These flyers and /or notices are to be printed on quality recyclable paper in the format presented by the Treasurer.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

These inserts will be between 1/3 of an 8.5x11 sheet up to 8.5x11 (folded in thirds for insertion), printed in black (no color). The Treasurer's Office is currently drafting a redesigned insert and does not have a sample.

The statement colors must change on an annual basis in an attempt to eliminate statement confusion from year to year. The statement should be white, with colored ink. The Treasurers' Office, in collaboration with the vendor, will decide annually on the appropriate color for each statement type.

The Treasurer's Office also requires a window envelope, bar coded to the appropriate Vancouver Post Office Box for the County Treasurer (PO Box 9808, Vancouver WA 98666-8808) for the return mailing of the remittance and the applicable statement copy (first half or second half) by the taxpayer to the Treasurer.

Each statement shall contain space for four (4) years of tax information on each parcel with the 4<sup>th</sup> year combining any prior years with amounts due. Should the statement contain only current year information, and reflect no delinquencies, the statement will show only the current year as due. If a statement only reflects current year taxes the OCR scanline will only contain 42 characters. If the statement reflects any delinquencies along with the current year, the OCR scanline will contain 72 characters. See scan line configuration in **Exhibit B**.

On the backside of the property account statement, there is data that pertains to an analysis of prior year and current year information. This will be included as variable data pertaining to the specific property account, and NOT preprinted information. This presentation may require the vendor to develop custom programming.

The Treasurer will supply the vendor with electronic files via an FTP process containing the variable billing data. These files will be provided to the vendor as follows:

- 1<sup>st</sup> half taxes: Production files with appropriate variable data will be sent to the vendor prior to the end of January.
- 2<sup>nd</sup> half taxes: Production files with appropriate variable data will be sent to the vendor prior to September 1.

**Exhibit A** provides the layouts for the file format and the output to form information.

A National Change of Address process will be run in accordance with USPS requirements. The Treasurer is able to provide a file of owner names/addresses and a unique identifier (Exhibit K contains a file sample). The Treasurer will receive a file return with the results (Exhibit L contains a file sample). The Treasurer may have additional requests dependent on which step in production the USPS requires the NCOA to be completed.

Any statement record that contains an incomplete or unidentifiable address, e.g. missing city or state, needs to be bundled and returned within one (1) week to:

Overnight:  
Clark County Treasurer  
Attn: Data Management  
1300 Franklin St, 2<sup>nd</sup> Floor  
Vancouver, WA 98660

Regular USPS:  
Clark County Treasurer  
Attn: Data Management  
PO Box 5000  
Vancouver, WA 98666

The vendor will provide all statements in a PDF format, including statements that were replaced with a postcard or were suppressed from printing all together. The individual PDF files will be saved on an electronic USB storage device that is provided by the Treasurer, or may be sent via a FTP process.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

The statement form shall contain, within the format, a mailing address change form to include at a minimum the following: (See **Exhibit D3** for an example)

Name  
House number, street name, and unit number  
City, state, zip code  
Account Number (printed from tax statement FTP files)

**Exhibit C** Details the information as to the location, font type, and data for the Optical Character Read (OCR) line and barcode. This is a **critical component** of this bid and the vendor **must be able to perform** all functions specified within **Exhibit C**. The font type, used by the vendor for the OCR line, shall be "OCR A".

As a result of optically scanning these statements, a minimum standard of twenty-four (24-LB) pound bond paper is required. The exact specifications for the forms are as follows: (**Exhibit E**)

8 ½" x 11" or 8 ½ x 14  
Cut Stock 11" on long grain  
Thermal Inks,  
MICR White 17.5, 24# Stock  
Laser Perf Position 3 2/3" from bottom  
Perf is 40 (cut/inch), minimum 12 ½ lbs./inch

An ICR box will be used to aid in payment processing. The specifications are as follows:

DROP OUT Ink for ICR Boxes (NON READ INK)

The printing of the OCR line shall be in OCR A font with a minimum of 14" white space (clear space) around the scanline, ½" of clear space is recommended. A white space or clear space on the backside of the form should also be maintained. The OCR line should be kept away from the edge of the document. The mail extraction equipment can damage the edge.

The printing of the barcode shall be a font of 3 of 9 and be placed under the property account number, see **Exhibit C**.

The statement must be able to be processed using an Image Remittance Processing System.

### Envelopes

Outgoing envelopes used for mailing to the taxpayer shall be 9 3/16"x 4" with the window placement and size being, from the left-hand side-4 13/16" x 8 13/16", from the bottom of the envelope – up 2 ¼" x 3 ½" on recycled paper, as reflected on the enclosed outgoing envelope. The Treasurer shall reserve the option of ordering, from the vendor, an additional supply of outgoing envelopes each year. Vendor responses must include quotes for optional printing of important messages or communications on the outside of outgoing envelopes, to include characters allowed, colors, graphics or combination thereof.

Return envelopes used by the taxpayer to remit to the Treasurer shall be 8 ½" x 3 ¾" in size. The security envelopes shall be recycled paper with the window placement and size being, from the left hand side 4 14/16" x 7 15/16", from the bottom of the return envelopes. Envelopes are to be appropriately bar coded with the Treasurer's return address (PO Box 9808, Vancouver, WA 98666-8808). The security envelope should be of web construction with double glued side seams.

See **Exhibit F** for the envelope specifications.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

### Bursting, Stuffing, Sorting, Labeling, and Mailing

The vendor shall burst and stuff property account statements into the window envelope, insert any flyers, sort by zip code and presort, bundle by zip code and presort, label with US Postal Services approved tags, and deliver such tax statements to the US Postal Service nearest such vendor. The fold must align with the perforation line on each payment stub of the tax statement.

For clarity, the current process provides for a non-area identification permit stamp, which enables the statements to be mailed from the vendor's area by the vendor. The postage amounts are provided by the vendor after the zip code and presort sorting has been completed.

The vendor will notify the Treasurer of any difference between the actual postage and the estimated prepaid postage within 10 business days of the mail date. The Treasurer will have a warrant drawn payable to the vendor for any amount owing within 30 days of receipt of the invoice. The Treasurer should receive a refund of any postage overage within 5 business days of the vendor receiving payment in full for submitted invoices. All property account statements shall be first class mail.

Additionally, the vendor will be required to provide an edit listing reflecting, by tax type, total statements printed and the dollar amount of taxes due by category. This edit report, or separate edit report by tax type, will be required from the vendor providing number count and dollar amount of invalid accounts, pre-sort amounts and foreign country accounts.

Carbonless paper will not be acceptable. Laser printing is required with non-magnetic ink toner cartridges.

### Generic Statements

The Treasurer's Office will require approximately 50,000 additional statement forms annually.

These forms are used to print in-house duplicate and/or corrected statements of parcel data using a laser Jet printer with OCRA Font capability.

These forms do not contain the variable data information sets, they would be considered as blank forms used to create mailings prior to variable data incorporated thereon. Paper requirements are the same as the annual vendor printed tax statements. However, the variable data is not printed and only contains preprinted information including an ICR box for payment processing (see **Exhibit D** for an example).

Statements need to be shipped to the Clark County Treasurer, attention Tax Service, 1300 Franklin Street 2nd Floor, Vancouver, WA 98660.

### Tax Information Only Postcard

The tax information only postcard is currently being designed to meet statutory requirements and a sample is unavailable. The information only postcards will be sent to all property owners that have a lender reference. The postcards will be produced and mailed the same time as first and second half tax statements, with an acceptable delay of up to 1 week each year of the contract duration.

### Contact Personnel

The vendor shall provide and maintain a current list of personnel who will be available and assigned to answer questions or provide information pertaining to all services subject to this bid.

Such list shall provide alternate personnel should the assigned personnel be on vacation, sick or otherwise unavailable.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

### Treasurer's Staff Visitation/Review

Staff of the Treasurer's Office may visit and observe the printing, bursting, insertion, sorting and mailing facilities of the chosen vendor. Vendor shall accommodate such visitation. All costs associated with such observation shall be borne by Clark County.

### Other Services

It is the county's intent to use the same vendor selected through this RFP process to provide printing and mailing services for the Clark County Department of Assessment. The same costs, conditions, and rates supplied by the vendor and secured by the Treasurer's Office shall be made available; however, where the services are substantially different than those of the Treasurer, separate rates and unit costs may be proposed as an addendum to the vendor's response to this RFP. Please Note: *The selection of the vendor will be based solely on the needs and selection criteria of the Treasurer's Office. Should the selected vendor be unable to provide the additional services needed by the Department of Assessment the county reserves the right to issue a separate request for proposals.* A general description of the printing and mailing needs of the Department of Assessment is included in **Exhibit J**.

The Treasurer may choose to utilize the contracted vendor to provide electronic billing services. This would include electronic delivery of a tax statement image to registered users, and allow communication via email or SMS text. Communications would include new bill delivery/availability, approaching due date, missed due date and accumulation of interest and/or penalty.

4. Project Funding Allocation of funds for this RFP will be established based on the funds requested in the selected proposal.

5. Timeline for Selection

### **The following dates are the intended timeline:**

|                                    |                                |
|------------------------------------|--------------------------------|
| Proposals due                      | October 19, 2016               |
| Proposal questions submissions     | October 7, 2016                |
| Proposal question responses        | October 11, 2016               |
| Proposal review/evaluation period  | October 20 - 31, 2016          |
| Vendor interviews/demo (optional)  | November 2-9, 2016             |
| Selection committee recommendation | November 15, 2016              |
| Contract negotiation period        | November 16 - December 1, 2016 |
| Contract BOCC approval             | December, 2016                 |
| Contract effective date            | January 1, 2017                |

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

### Section IB Work Requirements

1. Required Services Printing of Property Tax Account Statements, inclusive of what is described in Scope of Project listed in the above project.

Vendor must be United States Postal Service (USPS) certified as a Full Service Intelligent Mail Barcode (IMB) mailer, vendor is required to provide USPS documentation supporting this certification. At least one staff involved with the County work will be an USPS certified Mail Design Professional.

All mail must be Presort Accuracy, Validation and Evaluation certified to mail at the Full Service IMB lowest rates and in accordance with all USPS requirements for securing automation rate postage. All postage discounts must be passed along to the County as a straight pass through with no markup.

2. Deliverables & Schedule

### Treasurer's Proposed Calendar of Responsibility

The **tentative** schedule of events for production control is as follows:

| Date         | Process   | Responsibility   |
|--------------|---|------------------|
| Nov 18       | Award contract  | TREASURER        |
| Dec 28-Jan 8 | Meet with vendor, discuss form layout and review calendar. Colors to vendor with estimated numbers of statements, envelopes and flyers. | TREASURER/Vendor |
| Jan 4th-8th  | Initial flyer art for approval  | Vendor           |
| Jan 11-15    | Final approval of envelope art and submit statement art for final approval  | Vendor           |
| Jan 11-15    | Approved envelope art to printer  | TREASURER        |
| Jan 11-22    | Approved statement art to printer   | TREASURER        |
| Jan 18-22    | Test files to vendor  | TREASURER        |
| Jan 18-22    | Final flyer art for approval  | Vendor           |
| Jan 18-22    | Test proof of data for verification   | TREASURER        |
| Jan 18-22    | Postage amount to Treasurer (if applicable)   | Vendor           |
| Jan 4-15     | NCOA-file to of owner/address   | TREASURER        |
| Jan 11-22    | NCOA corrections file   | Vendor           |
| Feb 1-5      | Live data files available   | TREASURER        |
| Feb 1-5      | Live data proofs to Treasurer   | Vendor           |
| Feb 8-12     | Statements printed  | Vendor           |
| Feb. 15      | Statements mailed   | Vendor           |
| Feb 8-12     | Provide data for information only postcard  | TREASURER        |
| Feb 15-19    | Information only postcards mailed   | Vendor           |
| Feb 22-26    | 1st half PDF file   | Vendor           |
| Aug 9-13     | Test files to vendor-2nd half statement   | TREASURER        |
| Aug 16-20    | Test proof of data for verification   | Vendor           |
| Aug 9-20     | NCOA-file to of owner/address   | TREASURER        |
| Aug 16-27    | NCOA corrections file   | vendor           |
| Aug 16-20    | Postage amount to Treasurer (if applicable)   | vendor           |
| Aug 30-Sep 3 | Live data files available   | TREASURER        |
| Aug 30-Sep 3 | Live data proofs to Treasurer   | Vendor           |
| Sep 1-10     | Statements printed  | vendor           |

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

|          |  |           |
|----------|--|-----------|
| Sep. 15  | Statements mailed                          | vendor    |
| Sep 6-10 | Provide data for information only postcard | TREASURER |
| Sep. 25  | Information only postcards mailed          | Vendor    |

### 3. Place of Performance

All work will be performed at the selected contractor's location.

### 4. Period of Performance

A contract awarded as a result of this RFP will be for 3 years and is intended to begin on December 1, 2016 and end November 30, 2019. Clark County reserves the right to extend the contract resulting from this RFP for a period of two (2) one (1) year periods, with the same terms and conditions, by service of a written notice of its intention to do so prior to the contract termination date.

### 5. Insurance/Bond

#### A. Commercial General Liability Insurance

Prior to the signing of a contract, the contractor(s) selected must show evidence of a certificate of commercial liability for a minimum of \$1,000,000 combined single limit.

#### B.. Proof of Insurance

Proof of Insurance shall be provided prior to the starting of the contract performance. Proof will be on an ACORD Certificate(s) of Liability Insurance, which the Proposer shall provide to Clark County. Each certificate will show the coverage, deductible and policy period. Policies shall be endorsed to state that coverage will not be suspended, voided, canceled or reduced without a 30 day written notice by mail. It is the Proposers responsibility to provide evidence of continuing coverage during the overlap periods of the policy and the contract.

All policies must have a Best's Rating of A-VII or better.

### 6. Plan Holders List

All proposers are required to be listed on the plan holders list.

- ✓ Prior to submission of proposal, please confirm your organization is on the Plan Holders List below:

To view the Plan Holders List, please click on the link below or copy and paste into your browser.

Clark County RFP site: <http://www.clark.wa.gov/general-services/purchasing/rfp.html>

If your organization is NOT listed, submit the 'Letter of Interest' to ensure your inclusion. See Attachment B.

Proposals received by Clark County by proposers not included on the Plan Holders List may be considered non-responsive.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

### Part II Proposal Preparation and Submittal

#### Section IIA

#### Pre-Submittal Meeting / Clarification

1. Pre-Submittal Meeting

There will be no pre-submittal meeting or site visit scheduled for this project.

2. Proposal Clarification

Questions and Requests for Clarification regarding this Request for Proposal must be directed in writing, via email, to the person listed on the cover page. The deadline for submitting such questions/clarifications is Friday, October 7, 2016.

An addendum will be issued no later than six calendar days prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

The Questions & Answers/Clarifications are available for review at the link below. Each proposer is strongly encouraged to review this document prior to submitting their proposal.

Clark County RFP site:

<http://www.clark.wa.gov/general-services/purchasing/rfp.html>

#### Section IIB

#### Proposal Submission

1. Proposals Due

Sealed proposals must be received no later than the date, time and location specified on the cover of this document.

The outside of the envelope/package shall clearly identify:

1. RFP Number and;
2. TITLE and;
3. Name and address of the proposer.

Responses received after submittal time will not be considered and will be returned to the Proposer - unopened.

Proposals received with insufficient copies (as noted on the cover of this document) cannot be properly disseminated to the Review Committee and other reviewers for necessary action, therefore, may not be accepted.

2. Proposal

For purposes of review and in the interest of the County, the County encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable.

The County discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials.

Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

Additional support documents should be included with each copy unless otherwise specified.

# Request for Proposal # 716

## Property Account Statement Production and Mailing Services

### Ability to meet proposal requirement, and evaluation and review of sample documents

Each respondent must provide 100 samples' of invoices, as well as sample envelopes, identical to what will be used by our customers in remitting their payments. These items will be utilized and tested as part of our Remittance Processing and Automated Mail Opening Equipment. The invoices and envelopes should follow the specifications listed in this document and produced from the same equipment which will be used during production should this RFP be awarded.

Clark County currently utilizes remittance processing equipment as well as Automated mail opening equipment to process and post mail in payments. It is critical to our remittance operations that the documents and envelopes are produced in a manner which will not impair the efficiencies created within this operation. By testing the sample invoices and payment envelopes that are to be produced on the equipment which will be used during production, Clark County will be able to determine the compatibility of these documents with our automated mail opening and remittance processing equipment.

### Experience, Work History, and References

Each respondent must provide a minimum of 3 references. The references should be inclusive of municipalities and government agencies of the same size or similar size to Clark County. The references should include clients who have more than a 3 year working relationship with the proposer.

## **Section IIC**

### **Proposal Content**

#### 1. Cover Sheet

This form is to be used as your proposal Cover Sheet

See Cover Sheet - Attachment A

#### 2. Respondent's Capabilities

Each respondent must provide 100 samples' of invoices, as well as envelopes which will be used by our customers in remitting their payments. These items will be utilized and tested as part of our Remittance Processing and Automated Mail Opening Equipment. The invoices and envelopes should follow the specifications listed in this document and produced from the same equipment which will be used during production should this RFP be awarded.

#### 3. Project Approach and Understanding

Clark County currently utilizes remittance processing equipment as well as Automated mail opening equipment to process and post mail in payments. It is critical to our remittance operations that the documents and envelopes are produced in a manner which will not impair the efficiencies created within this operation. By testing the sample invoices and payment envelopes that are to be produced on the equipment which will be used during production, Clark County will be able to determine the compatibility of these documents with our automated mail opening and remittance processing equipment.

#### 4. Proposed Cost

Proposed costs should be broken out in detail, defining the process and the cost associated with that process. The details should, at a minimum, represent the costs associated with producing a form, producing an outgoing envelope, as well as an incoming payment envelope, producing a postcard, placing variable data on a form-differentiating between the cost to place data on a billing statement and the cost to place data on a postcard, setup costs, creating pdf images, NCOA process, as well as estimated postage rates (best examples will be provided as a range based on numbers mailed).

Request for Proposal # 716  
Property Account Statement Production and Mailing Services

**Part III Proposal Evaluation & Contract Award**

**Section IIIA Proposal Review and Selection**

1. Evaluation and Selection: Proposals received in response to this RFP will be evaluated by a Review Committee. Committee review results and recommendations may be presented to an appropriate advisory board prior to the consent process with the Clark County Board of Commissioners.

2. Evaluation Criteria Scoring Each proposal received in response to the RFP will be objectively evaluated and rated according a specified point system.

**A one hundred (100) point system will be used, weighted against the following criteria:**

|  |    |
|--|----|
| Ability to meet proposal requirements and adhere to proposed timelines | 25 |
| Experience/work history/references                                     | 15 |
| Evaluation and review of sample documents                              | 40 |
| Cost   | 20 |

Total Points Available 0-100 Points

**Section IIIB Contract Award**

1. Consultant Selection The County will award a contract to the highest scoring Proposer. Should the County not reach a favorable agreement with the highest scoring Proposer, the County shall terminate negotiations and commence negotiations with the second highest scoring Proposer and so on until a favorable agreement is reached.

2. Contract Development The proposal and all responses provided by the successful Proposer may become a part of the final contract.

3. Award Review The public may view proposal documents after contract execution. However, any proprietary information so designated by the Proposer as a 'trade secret' will not be disclosed unless the Clark County Prosecuting Attorney determines that disclosure is required. At this time, Proposers not awarded the contract, may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

4. Orientation/Kick-off Meeting The Treasurer's Office will contact the vendor who is ultimately awarded this contract prior to the first week in December 2016 to begin work on the mailings which represent our 2017 - 1<sup>st</sup> installment billing.

Request for Proposal # 716  
Property Account Statement Production and Mailing Services

**Attachment A COVER SHEET**

General Information:

Legal Name of Applicant Agency \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Program Location (if different than above) \_\_\_\_\_

Email address \_\_\_\_\_

Tax Identification Number \_\_\_\_\_

→ Does the proposal comply with the requirements contained within the RFP?  
A "No" response may disqualify the proposal from further consideration.

Yes  No

→ Did outside individuals or agencies assist with preparation of this proposal?

Yes  No (if yes, describe.)\*\*

**Total Funds Requested Under this Proposal \$ \_\_\_\_\_**

I certify that to the best of my knowledge the information contained in this proposal is accurate and complete and that I have the legal authority to commit this agency to a contractual agreement. I realize the final funding for any service is based upon funding levels, and the approval of the Clark County Board of Councilors.

\_\_\_\_\_  
Signature Printed Name Title Date

**Vendor/Contractor:**

Have you or any of your employees who will be directly compensated retired from a Washington State Retirement System using the 2008 Early Retirement Factor?

Yes  No

If yes, please provide the name and social security number for each retiree to Clark County Purchasing.

Request for Proposal # 716  
Property Account Statement Production and Mailing Services

**Attachment B LETTER OF INTEREST**

Legal Name of Applicant Agency \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Program Location (if different than above) \_\_\_\_\_

Email address \_\_\_\_\_

- *All proposers are required to be included on the plan holders list. If your organization is NOT listed, submit the 'Letter of Interest' to ensure your inclusion.*

*In the body of your email, request acknowledgement of receipt.*

Email Attachment B to: [Beth.Balogh@clark.wa.gov](mailto:Beth.Balogh@clark.wa.gov) or [Priscilla.Ricci@clark.wa.gov](mailto:Priscilla.Ricci@clark.wa.gov)

Clark County web link:

<http://www.clark.wa.gov/general-services/purchasing/rfp.html>

***This document will only be used to add a proposer to the plan holders list. Submitting this document does not commit proposer to provide services to Clark County, nor is it required to be submitted with proposal.***

***Proposals may be considered non-responsive if the Proposer is not listed on the plan holders list.***