

EXHIBIT "A"
SPECIFICATIONS/REQUIREMENTS
Hidalgo County Tax Assessor/Collector
"Printing and Mailing of 2018, 2019 & 2020 Tax Statements and Envelopes"
BID NO: 2018-006-00-00-SGS

Hidalgo County Tax Assessor/Collector's office is currently soliciting to contract a qualified vendor that meets and/or exceeds all specification/requirements, terms and conditions for ***"Printing and Mailing of 2018, 2019 & 2020 Tax Statements and Envelopes"***, including but not limited to the following: **Section A & Section B**

PRE-BID CONFERENCE: will be held on **Monday, Month 00, 2018 at 1:30 P.M.,** at the Hidalgo County Purchasing Department (Conference Room) - 2802 S. Business Hwy. 281—Administration Bldg., Edinburg, Texas 78539. This is not a mandatory meeting, but we encourage all interested vendor(s) to attend. Samples will be provided.

SECTION: A

Item I: -----Approximately 350,000 1- Part Laser Printed Tax Statements (4/4 printing)

Item II: -----Folding, Inserting, Presorting, & Mailing of Tax Statements, (Item I). Full color printing is required on both sides.

Item III: -----Envelopes required for mailing, (Item I).

All bids must be in writing, the original signed in blue ink and mailed or delivered to: Martha L. Salazar, Hidalgo County Purchasing Agent, 2812 S. Bus. Hwy. 281, Edinburg, Texas 78539. Only Bids that include the three (3) items will be considered. Bids should be in a cost per piece format based on the number of items listed above.

Item I. Tax Statement

- 1) Size: 8 1/2" x 14" printed on two-sides. (3 inches from bottom is the perforation). Laser printed as duplex for both variable and static data.
- 2) Perforated for return payment stub (horizontal).
- 3) Laser printed Tax Statements on 20 lb. paper.
 - **2018** Tax Statements **must** be printed on **light green** color paper, in black ink.
 - **2019** Tax Statements **must** be printed on **light canary** color paper, in black ink.
 - **2020** Tax Statements **must** be printed on **light blue** color paper, in black ink.
 - **SIT** Statements for all years **must** have **light pink** color stub portion, in black ink.
- 4) Statement must be designed for the collection of taxes printed on two-sides for multiple entities.
- 5) Statement must be designed to be mailed in a special window envelope designed by the Tax Office.
- 6) Printing on statement must conform to all U.S. Postal Service regulations for Automation Mailing Discounts.
- 7) Provide (Delivery Point Barcode) on Statement Address to comply with U.S. Postal Service regulations.
- 8) All tax information for the statements must be extracted from removable storage media provided by

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Hidalgo County, **External HD, DVD’s or FTP site.**

- 9) Print selected information in **Delivery Bar Code/OCR** in compliance with Tax Office and ACT, (Appraisal & Collections Technology, Inc.) software requirements.
- 10) Print selected messages in English and Spanish. (translation will be provided by Hidalgo County)
- 11) Printed in zip code order and alphabetical order within the zip code.
- 12) Need PDF files of statements to external HD, DVD’s or FTP site. The PDF files need to be full text searchable and the file name to be the account number. (i.e. A10000000000000000.pdf)

Item II. Folding, Inserting, Sorting, and Mailing Tax Statement

- 1) Statements must be folded and inserted into a special window envelope, so that name and address and Delivery Point Barcode are visible and in compliance with U. S. Postal Service specifications for automated processing.
- 2) Statement(s) and a #9 return envelope will be inserted into a #10 special window envelope.
- 3) Statements must be sorted and packaged in a manner that will minimize the cost of mailing. Sort statements in singles, doubles, triples or more to take advantage of Post Office discounts. All statements with the same owner and address must be consolidated and mailed in a single envelope or package. Mail must be pre-sorted in a manner to take advantage of all discounts offered by the U.S. Postal Service.

Item III. Envelopes Required For Mailing (Item I) - (Envelope Samples Enclosed)

- 1) Return Envelopes #9 - (Approximately 220,000) ** see below
- 2) Special Window Envelopes #10- (Permit No. to be provided) - (Approximately 285,000)
- 3) Brown Kraft Wove Booklet Envelopes #28 - 9” x 12” - (Approximately 3,000)
- 4) White Wove Window Booklet Envelopes #28 - (Approximately 2,500)

**** Return Envelopes #9, must include a Blue marking on the upper left hand side, 2.5” from the edge. The dimensions of the blue marking will be 1.5” W x .5” H and be **Laser Jet or Ink Jet** printed.**

PRINTING INSTRUCTIONS:

TAX STATEMENTS		File	Printed Copies	PDF Image Copy
1)	Non Mortgage accounts (Zip, Alpha)	1	1	1
2)	Mortgage accounts (Mort, X-Ref)	1	1	1
3)	SIT Accounts (Zip, Alpha)	1	1	1

Upon completion of above mentioned processes, Tax Office personnel will inspect the statements (original samples) and with authorization from the current elected **Hidalgo County Tax Assessor-Collector**, must be obtained in order to release the statements for mailing.

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SECTION: B

- Item I: ----- Approximately 75,000 1-Part Laser Printed Tax Statements
Item II: ----- Approximately 50,000 1-Part Laser Printed Tax Statements
Item III: ----- Approximately 30,000 1-Part Laser Printed Tax Statements
Item IV: ----- Folding, Inserting, Presorting & Mailing of Tax Statements (Item I-II and III)
Item V: ----- Envelopes required for mailing, (Items I, II and III)

Items I, II & III: Tax Statements

- 1) Size: 8 ½ “x 11” printed on two sides. Laser printed as duplex for both variable and static data.
- 2) No perforation required for return payment stub.
- 3) Laser printed Tax Statements on 20 lb. On white paper, in black ink for 2018, 2019 and 2020.
- 4) Statements must be designed for the collection of taxes printed on two-sides for multiple entities.
- 5) Statements must be designed to be mailed in a special window envelope designed by the Tax Office.
- 6) Printing on statement must conform to all U.S. Postal Service regulations for Automation Mailing Discounts.
- 7) Provide (Delivery Point Barcode) on Statement Address to comply with U.S. Postal Service regulations.
- 8) All Tax Office information for the statements must be extracted from removable storage media provided by Hidalgo County External HD, DVD’s or FTP site.
- 9) Print selected information in Delivery Bar Code/OCR in compliance with Tax Office and ACT, (Appraisal & Collections Technologies) software requirements.
- 10) Print selection messages in English.
- 11) Print in Zip Code order and Alphabetical order within the Zip Code.

Item IV: Folding, Inserting, Sorting and Mailing Tax Statements

- 1) Statements must be folded and inserted into a Special Window Envelope, so that the name, address and Delivery Point Barcode are visible and in compliance with U.S. Postal Service specifications for automated processing.
- 2) Statement(s) will be inserted into a # 10 Special Window Envelope.
- 3) Statements must be sorted and packaged in a manner that will minimize the cost of mailing. Sort Statements in singles, doubles, triples or more to take advantage of Post Office discounts.

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All Statements with the same owner and address must be consolidated and mailed in a single envelope or package.

Item V: Envelopes Required For Mailing I, II, III – (Envelope Samples Enclosed)

Item I – 1) Special Window Envelopes #10 – (Approximately 65,000)
2) White Wove Window Booklet Envelopes #28 - (Approximately 1,000)

Item II - 1) Special Window Envelopes #10 – (Approximately 40,000)
2) White Wove Window Booklet Envelopes #28 - (Approximately 800)

Item III - 1) Special Window Envelopes #10 – (Approximately 20,000)
2) White Wove Window Booklet Envelopes #28 - (Approximately 500)

SPECIFICATIONS/REQUIREMENTS (applies to Sections A & B-unless otherwise indicated)

- 1) Bid amount must include materials, conversion of data, delivery and all related costs and shall remain firm throughout the contract term. Additional Cost for weighed metered mail (flats/large- #28 envelopes, **only**), will be indicated on the Bid page, (Exhibit B).
- 2) In case of a price increase on metered postage for First Class Mail Flat/Large envelopes-# 28, due to the request of the United States Postal Service, the awarded vendor shall provide proof of such increase as soon as possible.
- 3) Samples of the Tax Statement, Return Envelope #9 and the Window Envelopes #10 will be provided for your review, at the Pre-Bid Conference.
- 4) Hidalgo County is requesting the awarded vendor to utilize/access NCOA (National Change of Address) for accuracy and verification of addresses which will be printed on Tax Statements, in order to avoid undeliverable mail returns to Hidalgo County Tax Office.
- 5) Hidalgo County is requesting the awarded vendor provide a comma or tab delimited list of the addresses that were changed, to the Hidalgo County Tax Office, POC (point of contact) will be Rudy Flores, Hidalgo County Tax Office - (956) 289-7470, email: rudy.flores@hidalgocountytax.org
- 6) Vendor(s) agrees that to the extent an item is unavailable from Vendor(s) own inventory, vendor(s) will be responsible for locating an alternative supplier and for providing the product to County for the bid price.
- 7) In the event, the final printed statements do not meet the specifications of the final accepted proof by Hidalgo County Tax Office representative, the awarded vendor will be responsible for any additional fees which may have been incurred by Hidalgo County.
- 8) Vendor must provide at least two (2) references with other governmental clients located in the State of Texas such as; cities, counties, etc.
- 9) Vendor shall have at least **one (1)** office located in the State of Texas.

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- 10) Close **communication** with the Tax office is very **important** and must be kept throughout the term of contract. At least 5 months prior to the commencement of the 2018, 2019 & 2020 Tax Statements, and Envelopes, contact must be made with Alex Bazan at the County Tax office, either by telephone at: (956) 318-2157 Ext. 4742, or via email to: alex.bazan@hidalgocountytax.org , and/or by meeting, in order to review and follow up on the Specifications for the Tax Statements for 2018, 2019 and 2020.

SECTION A (Specifications only)

- 1) Bidder(s) commitment to print and deliver mail **Tax Statements**, by no later than the following deadlines

2018 - Tax Statements	2019 - Tax Statements	2020 - Tax Statements
November 1, 2018	November 1, 2019	November 1, 2020

- 2) The awarded vendor(s) must provide samples of (the actual perforated original sample) proposed items for approval prior to printing and mailing. Approval will be made within 1-2 business days.
- 3) Brown Kraft Booklet Envelopes #28 will include more than one (1) Tax Statement. A file will be sent separately for the use of these envelopes. (i.e. Mortgage files)
- 4) White Wove Booklet Envelopes #28 will include five (5) or more Statements. A file will be sent separately for the use of these envelopes. (i.e. 5plus file).
- 5) The Hidalgo County Tax Office will be responsible for all postage needed for this project. The awarded vendor will be provided the Edinburg Texas Post Office Permit number and also a Postage deposit for the mailing of metered flats/large envelopes #28 (only).

SECTION B (Specifications only)

- 1) The awarded vendor must provide samples of (the actual original sample) proposed items for approval prior to printing and mailing. Approval will be made within 1-2 business days.
- 2) Samples of the Tax Statement and Window Envelopes #10 will be provided for your review, at the Pre-bid Conference.
- 3) White Wove Booklet envelopes #28 will include five (5) or more statements.
- 4) The Hidalgo County Tax Office will be responsible for all postage needed for this project. The awarded vendor will be provided the Edinburg Texas Post Office Permit number and also a Postage deposit for the mailing of metered flats/large envelopes #28 (only).

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5) Bidder(s) shall commit to print and deliver mail on or before the following deadlines:

Description	2018 Tax Statements	2019 Tax Statements	2020 Tax Statements
Item I	January 18, 2019	January 17, 2020	January 18, 2021
Item II	February 15, 2019	February 15, 2020	February 15, 2021
Item III	March 15, 2019	March 16, 2020	March 15, 2021

TERMS AND CONDITIONS

1. **Contract will commence on June 30, 2018 to March 31, 2021.** Each year shall be for two weeks or less turn around from the **date** of receipt of HD or FTP Text files. However, it may **be extended if delay is caused by the Hidalgo County Tax Office or for good cause, to be determined by Hidalgo County Tax Assessor-Collector.**
2. County reserves the right to continue this bid for an additional sixty (60) day grace period at the end of the contract term for unforeseen delays.
3. Hidalgo County reserves the right to hold the bids for a period of (90) ninety days without taking action.
4. Any contract awarded to a successful bidder will be in effect until;
 - a) The contract expires
 - b) Delivery acceptance of products and/or performance of services ordered, or
 - c) Terminated by County with thirty (30) days written notice prior to be cancelled.
5. Hidalgo County reserves the right to award to ONE or MULTIPLE vendors if the County determines it is in its best interest to do so.
6. Hidalgo County reserves the right to award this contract on an **“all or nothing basis”**.
7. Hidalgo County may seek purchases/service from state awarded vendors or any other cooperative purchasing programs, whenever it is in the best interest to do so.
8. Hidalgo County reserves the right to reject any/all bids, to waive any/all formalities or technicalities, or to accept the bid considered the best and most advantage to the County.
9. Insurance requirements for this project to be maintained throughout the contract term (Refer to limits on the Exhibit “C” for limits).
10. After bid is awarded and successful awarded contractor defaults in meeting the general instructions to bidders(s) and/or in complying with the contract agreement, Hidalgo County reserves the right to seek the services of the next lowest bidder(s). In such event, Hidalgo County shall charge the successful bidder the difference for any additional cost to the County.
11. **All costs and expenses associated with the preparation and submission of (bid, proposals, statement of qualifications (RFQ) and quotes) shall be responsibility of the bidder and no reimbursements for such charges or expenses shall be passed on to HIDALGO COUNTY.**

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ADDITIONAL INFORMATION:

Hidalgo County is requesting that any and all questions, inquires and clarifications regarding quotes, bids, proposals or statements of qualifications be addressed to Martha L. Salazar, CPPB, Purchasing Agent, 2812 South Business Hwy. 281, Edinburg, TX. 78539.

ALL WRITTEN INQUIRIES WILL BE ACCEPTED via facsimile (956)292-7612 or via e-mail sandy.suarez@co.hidalgo.tx.us by no LATER THAN, MONDAY, MONTH 00, 2018 by 5:00 p.m. Responses to said inquiries will be sent to all applicants via facsimile by no later than WEDNESDAY, MONTH 00, 2018 by 5:00 p.m. Telephone Inquiries WILL NOT be accepted.

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