



WILLIAMSON COUNTY  
PURCHASING DEPARTMENT  
301 SE INNER LOOP - SUITE 106  
GEORGETOWN, TEXAS 78626

<http://www.wilcogov.org/purchasing>

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## REQUEST FOR PROPOSAL

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### TAX STATEMENT PRINTING FOR WILLIAMSON COUNTY

PROPOSAL NUMBER: 12WCP2001

PROPOSALS MUST BE RECEIVED ON OR BEFORE: MAY 24, 2011 – 1:30 PM

PROPOSALS WILL BE PUBLICLY ACKNOWLEDGED: MAY 24, 2011 – 2:00 PM

PRE-PROPOSAL CONFERENCE WILL BE HELD ON:

THURSDAY, MAY 5<sup>TH</sup> AT 10:00 AM

IN THE WILLIAMSON COUNTY HR TRAINING ROOM, WILLIAMSON COUNTY INNER LOOP  
ANNEX,  
301 SE INNER LOOP, STE 108, GEORGETOWN, TEXAS

### PROPOSAL SUBMISSION

**DEADLINE:** Proposals must be received in the Williamson County Purchasing Department on or before 1:30 PM on Tuesday, MAY 24, 2011. Proposals will be publicly acknowledged at 2:00 PM or soon thereafter in the Williamson County Purchasing Department located in the Inner Loop Annex, 301 SE Inner Loop - Suite 106, Georgetown, Texas.

**METHODS:** Sealed proposals may be hand-delivered or mailed to the *Williamson County Purchasing Department, Attn: Kerstin Hancock – Purchasing, Suite 106, Williamson County Inner Loop Annex, 301 SE Inner Loop, Georgetown, Texas 78626*.

**FAX/EMAIL:** Facsimile and electronic mail transmittals will not be accepted.

### PROPOSAL REQUIREMENTS

**TRIPLICATE:** All proposals must be submitted in triplicate (one (1) original complete proposal set, one (1) copy of the proposal set) AND one (1) CD (including all required documents). The proposal sets should be marked "original" or "copy". The original set must contain original signatures. A "proposal set" consists of the COMPLETED AND SIGNED Proposal Worksheet and any other required documentation.

**SEALED:** All proposals must be returned in a sealed envelope with the **proposal name, number, opening**

**date and time clearly marked on the outside.** If an overnight delivery service is used, the proposal name, number, opening date and time must be clearly marked on the outside of the delivery service envelope.

**REFERENCES:** Williamson County may require proposer to supply a list of at least three (3) references where like services have been supplied by their firm if vendor has not done business with the County within the past five (5) years. Include name of firm, address, phone number and name of representative.

**LEGIBILITY:** Proposals must be legible and of a quality that can be reproduced.

**FORMS:** All proposals must be submitted on the forms provided in this proposal document. Changes to proposal forms made by proposers shall disqualify the proposal. Proposals cannot be altered or amended after submission deadline.

**LATE PROPOSAL:** Proposals received after submission deadline will not be acknowledged and will be considered void and unacceptable. Williamson County is not responsible for lateness of mail, courier service, etc.; unmarked or improperly marked proposals; or proposals delivered to the wrong location.

**RESPONSIBILITY:** It is expected that a prospective proposer will be able to affirmatively demonstrate



proposer's responsibility. A prospective proposer should be able to meet the following requirements:

- a) have adequate financial resources, or the ability to obtain such resources as required;
- b) be able to comply with the required or proposed delivery schedule;
- c) have a satisfactory record of performance;
- d) be otherwise qualified and eligible to receive an award.

Williamson County may request representation and other information sufficient to determine proposer's ability to meet these minimum standards listed above.

## AWARD

**THIRTY DAYS:** Awards should be made approximately thirty (30) days after the proposal opening date. Results may be obtained by contacting the Purchasing Contact.

**REJECTION OR ACCEPTANCE:** No more than one proposal will be awarded for any item, single department or area. Proposals may be rejected for some items, departments or areas, even though awards are made for others. The convenience of having a single source for similar items will be taken into consideration together with price in determining the lowest and best proposal.

It is understood that the Commissioners Court of Williamson County, Texas, reserves the right to accept or reject any and/or all Proposals for any or all materials and/or services covered in this Proposal request, and to waive informalities or defects in the Proposal or to accept such Proposal it shall deem to be in the best interest of Williamson County. In determining the overall best Proposal, the County may exercise either (or both) of the following options granted to local government's under the Texas Local Government Code.

Option 1 – TLGC § 271.905. This option allows the County to consider a Proposer's principal business location in determining the overall lowest and best Proposal.

Option 2 – TLGC § 271.907. This option allows the County to evaluate Proposal and give preference to goods and/or services of a vendor that demonstrates that the vendor meets or exceeds any and all state or federal environmental standards, including voluntary standards, relating to air quality. If the Proposal being submitted will have an effect on air quality for Williamson County (as it relates to any state, federal, or voluntary air quality standard), then the Proposal should provide information in narrative form indicating the anticipated air quality impact. Proposers are expected to meet all mandated state and federal air quality standards.

**CONTRACT:** This Proposal, when properly accepted by Williamson County, shall constitute a contract equally binding between the successful proposer and Williamson

County. No different or additional terms will become a part of this contract with the exception of a change order.

The successful proposer may be required to sign an additional agreement containing terms necessary to ensure compliance with the proposal.

**CONTRACT ADMINISTRATION:** Under this contract, Larry Gaddes, County Chief Deputy Tax Assessor-Collector, shall be the contract administrator with designated responsibility to ensure compliance with contract requirements, such as but not limited to, acceptance, inspection and delivery. The contract administrator will serve as liaison between Williamson County Commissioner's Court and the successful bidder.

**CONTRACT PERIOD(S):** The Initial Contract Period is October 01, 2011 through May 31, 2012. Possible extensions include.

June 1, 2012 through May 31, 2013  
June 1, 2013 through May 31, 2014

**CONTRACT EXTENSIONS:** At the end of the current contract period, the Commissioners Court reserves the right to extend this contract, by mutual agreement of both parties, as it deems to be in the best interest of the county. This extension will be in twelve (12) month increments for up to an additional twenty-four (24) months, with the terms and conditions remaining the same; and with a price escalation at renewal time each year of no more than the consumer price index, All urban consumers (CPI-U), US City Average, all items, as published by the United States Department of Labor, Bureau of Labor Statistics. The yearly increase in the CPI shall be the latest index published (120) days prior to the end of the contract year. The total period of this contract, including all extensions will not exceed a maximum combined period of thirty-two (32) months. The extension of this contract is contingent on the appropriation of necessary funds by Commissioner's Court for the fiscal year in question. Upon the failure of Commissioner's Court to so appropriate in any year, the Vendor may elect to terminate this agreement, with no additional liability to the County. The County and the Vendor agree that termination shall be the Vendor's sole remedy under this circumstance.

## PROPOSAL CONTACTS

Any questions, clarifications or requests for general information should be directed to the contacts listed below. Question submittals must be made via email, and are **due by 5:00 PM on Wednesday, May 18, 2011**. Every effort will be made to answer questions as soon as possible with an email response.

All submitted questions with their answers will be posted to the Williamson County portal, <http://wilco-online.org/ebids/bids.aspx>. If you do not have access to email or internet please call the Purchasing contact below.



**PURCHASING CONTACT:**

Kerstin Hancock  
301 SE Inner Loop - Suite 106  
Georgetown, TX 78626  
(512) 943-1546  
khancock@wilco.org

**TECHNICAL CONTACT:**

Larry Gaddes  
904 S. Main Street  
Georgetown, TX 78626  
(512) 943-1641  
lgaddes@wilco.org

**MISCELLANEOUS**

**FOB DESTINATION:** All of the items listed are to be Free On Board to final destination (FOB Destination) with all transportation charges if applicable to be included in the price, unless otherwise specified in the Request for Proposal. The title and risk of loss of the goods shall not pass to the County until receipt and acceptance takes place at the FOB point.

**FIRM PRICING:** The price must be good from the date of proposal opening for a fixed period of time. Unless the proposal expressly states otherwise, this period shall be until the end of the initial term. Proposals which do not state a fixed price, or which are subject to change without notice, will not be considered. The Court may award a Contract for the period implied or expressly stated in the best proposal.

**ESTIMATED QUANTITIES:** The estimated quantity of each item listed in the notice is only an estimate -- the actual quantity to be purchased may be more or less. The County is not obligated to purchase any minimum amount, and the County may purchase any reasonable amount greater than the estimate for the same unit price. Any limit on quantities available must be stated expressly in the proposal.

**FUNDING:** Funds for payment have been provided through the Williamson County budget approved by Commissioners Court.

**SALES TAX:** Williamson County is by statute, exempt from the State Sales Tax and Federal Excise Tax.

**STATEMENTS:** No oral statement of any person shall modify or otherwise change, or affect the terms, conditions, plans and/or specifications stated in the various Proposal Packages and/or Proposal Instructions/Requirements.

**PURCHASE ORDER:** If required by the Williamson County Purchasing Department a purchase order(s) may be generated to the successful proposer for products and/or services. If a purchase order is issued the

purchase order number must appear on all itemized invoices and/or requests for payment.

**PAYMENT:** Payment shall be made by check from the County upon satisfactory completion and acceptance of items and submission of the Invoice to the ordering department for work specified by this Contract Document. All payments owed will be paid no later than thirty (30) days after the goods or services are received OR the date that the invoice is received by the Auditor's Office whichever is later. As a minimum, invoices shall include:

- (1) Name, address, and telephone number of Vendor and similar information in the event the payment is to be made to a different address
- (2) County contract, Purchase Order, and/or delivery order number
- (3) Identification of items or service as outlined in the contract
- (4) Quantity or quantities, applicable unit prices, total prices, and total amount
- (5) Any additional payment information which may be called for by the contract

Payment inquiries should be directed to the Auditor's Office, Accounts Payable Department: Donna Baker, 943-1558.

**CONFLICT OF INTEREST:** No public official shall have interest in a contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

As of January 1, 2006 Proposer's are responsible for complying with Local Government Code Title 5, Subtitle C, Chapter 176. Additional information may be obtained from Williamson County's website at the following link:

<http://www.wilco.org/CountyDepartments/Purchasing/ConflictOfInterestDisclosure/tabid/689/language/en-US/Default.aspx>

***The Williamson County Conflict of Interest Statement is included as Attachment A of this RFP. This form should be completed, signed, and submitted with your proposal.***

**ETHICS:** The proposer shall not accept or offer gifts or anything of value nor enter into any business arrangement with any employee, official or agent of Williamson County.

**DOCUMENTATION:** Proposer shall provide with this proposal response, all documentation required by this proposal. Failure to provide this information may result in rejection of the proposal.

**TERMINATION FOR CAUSE:** In the event of breach or default of this contract or any other additional agreement containing terms necessary to ensure compliance with



the Proposer's proposal, Williamson County reserves the right to enforce the performance of this contract or any additional agreement by any manner prescribed by law or deemed to be in the best interest of Williamson County. At Williamson County's sole discretion, the Proposer may be given reasonable time to cure its breach or default prior to Williamson County's termination under this provision. Williamson County's option to offer time to cure a default or breach shall, however, in no way be construed as negating the basis for termination for non-performance.

**SILENCE OF SPECIFICATIONS:** The apparent silence of these specifications as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.

**COMPLIANCE WITH LAWS:** The successful proposer shall comply with all applicable federal, state and local laws and regulations pertaining to the practice of the profession and the execution of duties under this proposal including the TEXAS HAZARD COMMUNICATION ACT and THE WILLIAMSON

## COUNTY HAZARD COMMUNICATION PROGRAM POLICY.

**PROPRIETARY INFORMATION:** All material submitted to the County becomes public property and is subject to the Texas Open Records Act upon receipt. If a Proposer does not desire proprietary information in the proposal to be disclosed, each page must be identified and marked proprietary at time of submittal. The County will, to the extent allowed by law, endeavor to protect such information from disclosure. The final decision as to what information must be disclosed, however, lies with the Texas Attorney General. Failure to identify proprietary information will result in all unmarked sections being deemed non-proprietary and available upon public request.

## WORKER'S COMPENSATION

This contract contemplates services that do not require worker's compensation insurance coverage. However, if it becomes necessary that the proposer provide services related to the project such as delivering equipment or materials, an amended contract will be executed which fully complies with the Texas Labor Code and the Texas Worker's Compensation Commission requirements.

## PROPOSAL SPECIFICATIONS

In anticipation of the 2011 tax collection process beginning August 2011, the Williamson County Tax Assessor is seeking proposals from qualified vendors for the printing of tax statements which will be conducted by October 31, 2011. The proposal shall include, but is not limited to processing, printing, and mailing of tax statements producing electronic files via FTP containing copies of the individual tax statements in PDF format and producing PDF statements ONLY(no printed statements) for all mortgage company files. **Printing on statements must be able to be read by the county's remittance processing systems Opex scanner.**

### REQUIREMENTS

- Maximum 130,000\* custom stock statements w/perforation for tax year 2011  
2010 – 118,000\* statements mailed  
2010 – 60,000\* owners w/lenders – electronic PDF statement only
- Statements are on 20lb white stock w/red, blue and black ink on front, black ink only on back
- Maximum 100,000\* inserts with double sided printing on color paper w/black ink cut into 1/3 page (3 inserts per letter size sheet)
- Produce and provide an electronic file of approx 60,000 mortgage company accounts that will not receive a mailed hardcopy tax statement.
- Fold the tax statement on the perforated line
- Perform NCOA/CASS/PAVE certifications process on all outgoing mail
- Print Barcode font and OCR-A font in minimum 12pt type on statements.
- For single owner w/multiple accounts, statements are combined and mailed in the most cost effective manner for Williamson County.
- Refund any postage overage within 30 days after date statements are mailed

\*Numbers are estimates only, based on historical information



In addition to the requirements listed above, please provide answers to the following questions:

1. How long has your company been printing property tax statements?

**Fourteen (14) years**

2. What other tax office have you performed/worked for? List references we may contact on attached reference sheet B.

**See Attachment Sheet B.**

3. Have you worked with Tyler Technologies, The Software Group or Orion/Odyssey software before?

**Yes**

If yes, please list references for the occasions that you worked with the Orion/Odyssey software on attached reference sheet C.

**See Attachment Sheet C.**

4. How do you prioritize or queue your incoming jobs/work? First in/First out, job size, tenure?

**Our shop works on an "as promised" schedule.** All mail dates are set by the customer and scheduled accordingly. The mail date selected by the customer sets the priority. If we promise your job to be out on a certain day, it will go out on that day. If your data is sent late to IMS, we will still endeavor to get it out on time. But sometimes when data is late, and even working 24 hr. days, it will go out later than the promised date, but always as quickly as possible.

5. What is your estimated total turn-around time to mail statements after you have received our final approval of the sample statement?

**Five (5) working days.**

6. Please provide contact information for at least 3 other customers for which you have provided printing services on the attached reference sheet D.

**See Attachment Sheet D.**

7. We intend for the tax statements to be mailed before Monday October 31<sup>st</sup>. Are there any workflow concerns in your production facilities that would keep you from being able to produce and mail statements at/near the end of the month?

**No**

Should Williamson County incur direct expenses due to vendor not fulfilling the stated requirements, Williamson County shall deduct this cost from total invoice amount.

### **Evaluation Process**

Evaluation will be based but is not limited to the following criteria:

- Price
- Experience /References
- Capability of CASS and OCR/MICR printing
- Turn-around time
- Handling of statements

## PRICE SCHEDULE

PRODUCT/SERVICE	UNIT COST PER 1000	TOTAL COST
Computer Pre-Processing	\$ <u>0.0075</u>	\$ <u>885.00</u>
Laser Imaging	\$ <u>0.0285</u>	\$ <u>3,363.00</u>
Mail Processing/Mailed Parcel	\$ <u>0.0200</u>	\$ <u>2,360.00</u>
Job Programming <i>(Includes all PDFs)</i>	\$ <u>125.00</u>	\$ <u>1,000.00</u>
Mail Preparation/Mailed Parcel	<u>Incl. in Mail Processing</u>	\$ <u>-</u>
CASS/PAVE Postal Certification	\$ <u>0.0100</u>	\$ <u>1,180.00</u>
Bar-coding/ Presort Costs		\$ <u>-</u>
NCOA Postal Certification/Mailed Parcel	\$ <u>0.0050</u>	\$ <u>590.00</u>
Minimum job set-up time	<u>No Charge</u>	\$ <u>-</u>
Job set-up Fee <i>(Flat fee includes all PDFs)</i>	\$ <u>1,000.00</u>	\$ <u>1,000.00</u>
Digitize logo, fonts, etc.	<u>No Charge</u>	\$ <u>-</u>

### FORMS

### UNIT COST PER 1000

### Total Cost

Tax Statement – 130,000 20 lb stock w/perforation Front –red/blue/black ink. Back-black ink	\$ <u>0.0207</u>	\$ <u>2,691.00</u>
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Insert – 100,000 Color paper cut to 1/3 page. Include insertion fee in unit and total cost, if any	\$ <u>0.0075</u>	\$ <u>750.00</u>
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Estimated total turn- around  
time to mail statements after  
receipt of final approval of  
the sample statement

5 working days- a working day being any Monday through Friday that the USPS is open to accept First Class Presorted bulk mail.



## ATTACHMENT A



### WILLIAMSON COUNTY CONFLICT OF INTEREST STATEMENT

I hereby acknowledge that I am aware of the Local Government Code of the State of Texas, Section 176.006 regarding conflicts of interest and will abide by all provisions as required by Texas law.

**Printed name of person submitting form:**

**Thomas Kelly Dowe**

**Name of Company:**

**Information Management Solutions, LLC**

**Date:**

**May 20, 2011**

**Signature of person submitting form:**

*Thomas Kelly Dowe*

Notarized:

**Sworn and subscribed before me**

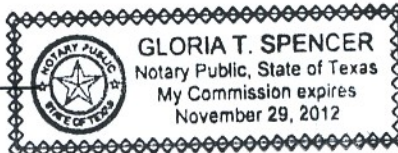
**by:**

*Gloria T. Spencer*

**on**

*5/20/2011*

**(date)**



## ATTACHMENT B

**Our Reference as listed in Attachment Sheets B, C and D are considered PROPRIETARY INFORMATION as defined by the Texas Open Records Act**

### REFERENCE SHEET

Proposer must submit references. List any Tax Office you have done business with:

1. Company Name Burnet County Tax Assessor Collector  
Contact Stan Hemphill  
Title Tax Assessor Collector  
Phone 512-756-8291
2. Company Name Comal County Tax Assessor Collector  
Contact Cathy Talcott  
Title Tax Assessor Collector  
Phone 830-620-5521
3. Company Name Kendall County Tax Assessor Collector  
Contact Terry Kramer  
Title Tax Assessor Collector  
Phone 830-249-2513
4. Company Name Angelina Appraisal District  
Contact Kenneth Johnson  
Title Deputy Chief  
Phone 936-634-8456
5. Company Name Williamson County Appraisal District  
Contact Pam Orr  
Title Director of Operations  
Phone 512-943-1601



## ATTACHMENT C

### REFERENCE SHEET – Experience with Orion / Odyssey Software

List Occasions/Projects where you have worked with Orion/Odyssey Software

1. Company Name Pasadena ISD Tax Office  
Contact Zelda Cryar  
Type of Project Tax Statements  
Phone 713-740-0259 Date of Project 3 or 4 years ago
2. Company Name Williamson Count Appraisal District  
Contact Pam Orr  
Type of Project Notices of Appraised Value  
Phone 512-943-1601 Date of Project 2011
3. Company Name Kendall County Tax Assessor Collector  
Contact Terry Karner  
Type of Project Tax Statements  
Phone 830-249-2513 Date of Project 2011
4. Company Name Williamson County Tax Assessor Collector  
Contact Deborah Hunt  
Type of Project Tax Statements  
Phone 512-943-1601 Date of Project 2010
5. Company Name Orange County Appraisal District  
Contact Michael Cedars  
Type of Project Notices of Appraised Value  
Phone 409-745-4777 Date of Project 2011



## ATTACHMENT D

### REFERENCE SHEET

Proposer must submit at least three (3) references for other customers you have provided printing services

1. Company Name Travis County  
Contact Tom Ashburn  
Title Administrator  
Phone 512-854-9139
2. Company Name University Healthcare System  
Contact Joseph Irving  
Title Administrator  
Phone 210-358-9258
3. Company Name Pedernales Electric Coop  
Contact Clay Simpson  
Title IT  
Phone 830-868-5025
4. Company Name \_\_\_\_\_  
Contact \_\_\_\_\_  
Title \_\_\_\_\_  
Phone \_\_\_\_\_
5. Company Name \_\_\_\_\_  
Contact \_\_\_\_\_  
Title \_\_\_\_\_  
Phone \_\_\_\_\_



# WILLIAMSON COUNTY PROPOSAL FORM

## 2011 TAX STATEMENT PRINTING WILLIAMSON COUNTY

PROPOSAL NUMBER: 12WCP2001

NAME OF PROPOSER: Information Management Solutions, L.L.C.

Mailing Address: 2422 Freedom St.

City: San Antonio State: TX Zip: 78217

Email Address:

kelly@totalims.com

Telephone: (210) -826-4994 Fax: (210)- 826-2676

The undersigned, by his/her signature, represents that he/she is authorized to bind the proposer to fully comply with the terms and conditions of the attached Request for Proposal, Specifications, and Special Provisions for the amount(s) shown on the accompanying proposal sheet(s). By signing below, you have read the entire document and agreed to the terms therein.

 Date of PROPOSAL: May 20, 2011  
Signature of Person Authorized to Sign Proposal

Printed Name and Title of Signer: Thomas Kelly Dowe

**DO NOT SIGN OR SUBMIT WITHOUT READING ENTIRE DOCUMENT**

**THIS FORM MUST BE COMPLETED, SIGNED, AND RETURNED WITH PROPOSAL**



This page is included to show exactly how IMS would bill for this job using the volumes expressed in the RFP. It therefore shows the total amount we would bill if we are the successful bidder, which would be \$10,378.00. **This page is not intended to change, alter or amend the Proposal in any way.** It is included solely to give Williamson County more detailed information on how IMS would apply the "Unit Cost" to the volumes expressed in the proposal. It shows how IMS would apply the "Unit Cost" to each Statement regardless of the number processed or mailed in an envelope.

## PRICE SCHEDULE

PRODUCT/SERVICE	UNIT COST PER 1000	Volume- Column added for volume	TOTAL COST
<i>Computer Pre-Processing</i>	\$ <u>0.0075</u>	118,000	\$ <u>885.00</u>
<i>Laser Imaging</i>	\$ <u>0.0285</u>	118,000	\$ <u>3,363.00</u>
<i>Mail Processing/Mailed Parcel</i>	\$ <u>0.0200</u>	118,000	\$ <u>2,360.00</u>
<i>Job Programming (Includes all PDFs)</i>	\$ <u>125.00</u>	8	\$ <u>1,000.00</u>
<i>Mail Preparation/Mailed Parcel</i>	<u>Incl. in Mail Processing</u>	118,000	\$ <u>-</u>
<i>CASS/PAVE Postal Certification</i>	\$ <u>0.0100</u>	118,000	\$ <u>1,180.00</u>
<i>Bar-coding/ Presort Costs</i>			\$ <u>-</u>
<i>NCOA Postal Certification/Mailed Parcel</i>	\$ <u>0.0050</u>	118,000	\$ <u>590.00</u>
<i>Minimum job set-up time</i>	<u>No Charge</u>	Included	\$ <u>-</u>
<i>Job set-up Fee (Flat fee includes all PDFs , setup charges and digitizing.)</i>	\$ <u>1,000.00</u>	1	\$ <u>1,000.00</u>
<i>Digitize logo, fonts, etc.</i>	<u>No Charge</u>	1	\$ <u>-</u>
			\$ <u>10,378.00</u>

## FORMS

	UNIT COST PER 1000		Total Cost
Tax Statement – 130,000 20 lb stock w/perforation Front –red/blue/black ink. Back-black ink	\$ <u>0.0207</u>	130,000	\$ <u>2,691.00</u>
Insert – 100,000 Color paper cut to 1/3 page. Include insertion fee in unit and total cost, if any	\$ <u>0.0075</u>	100,000	\$ <u>750.00</u>

Estimated total turn- around time  
to mail statements after receipt of  
final approval of the sample  
statement

5 working days- a working day being any Monday through Friday that  
the USPS is open to accept First Class Presorted bulk mail.

**RETURN PAGES BEGINNING WITH PAGE6 THROUGH THIS PAGE WITH YOUR PROPOSAL  
PACKAGE AND ALL REQUIRED INFORMATION**