



GENERAL INFORMATION

CITY OF ALLEN, TEXAS  
BIDS WILL BE ACCEPTED IN THE OFFICE OF THE PURCHASING MANAGER

**REQUEST FOR PROPOSAL  
2019-6-61  
UTILITY BILLING PRINTING AND MAILING SERVICES**

PROPOSALS ARE DUE TO THE  
PURCHASING DIVISION PRIOR TO:

**AUGUST 8, 2019 @ 2:00 P.M.**

**ELECTRONIC RESPONSES SUBMITTED THROUGH  
IONWAVE E-BID SYSTEM ARE RECOMMENDED**

NO LATE BIDS WILL BE ACCEPTED  
FACSIMILE OR E-MAILED BIDS WILL NOT BE ACCEPTED

PROPOSAL PACKAGES  
MAY BE DELIVERED OR MAILED TO:

**CITY OF ALLEN PURCHASING DIVISION  
305 CENTURY PARKWAY  
ALLEN, TX 75013**

FOR ADDITIONAL INFORMATION CONCERNING THIS PROPOSAL PLEASE CONTACT:

Casey Bennett, Purchasing Analyst, 214-509-4643

**SECTION III**  
**SPECIFICATIONS/REQUIREMENTS**  
**REQUEST FOR PROPOSAL 2019-6-61**  
**UTILITY BILL PRINTING & MAILING SERVICES**

**I. Introduction and Scope of Services**

The City of Allen is soliciting Competitive Sealed Proposals for the printing and mailing of utility bills and delinquent notices. This service includes the receiving and processing of data transfer on a daily cycle, print, CASS certify, fold, envelope insert, City supplied inserts, presort, meter and mail.

**II. Contract Term**

The initial contract period shall be for a period of one year. The City reserves the right to extend the contract period for four (4) additional one-year periods (annual renewals), with said options to be exercised solely at the City's discretion.

**III. Requirements**

The Vendor shall provide the following services and meet or exceed all requirements listed in this section. All quantities are estimates only and orders will be placed on an "as-needed" basis.

**Our expectations include:**

- Postage at the lowest qualified postal rate
- Perforated bill for return stub
- Bar code and/or optical scan line on return stub
- Selectively insert return envelopes and other inserts (return envelopes would be inserted except for customers who pay by direct bank draft, approx. 12-15%)
- 24-hour turnaround for bills
- Bills printed in black, blue & red ink (City of Allen Logo colors)
- Accept PDF file for printing bills
- Ability to print standard message on back of bills
- Ability to print multiple page bills (however, probably less than 1% of our bills will be multiple pages)
- Provide facility location where our bills would be printed and your backup plan in the event of a problem at the primary facility

**A. General Services and Requirements**

- i. Provide security of information and supervision from start to finish.
- ii. City of Allen volume estimates:  
Be able to handle high volume production on a daily basis from 2,000 bills and up to 9,000 bills on occasion.  
  
Estimated annual requirement:  
Utility bill statement: 400,000  
Delinquent bill statement: 36,000
- iii. Provide courier service for special delivery and pick up requests.
- iv. Provide a single point of contact representing the account.
- v. Have the ability to preprint forms, envelopes and flyers.
- vi. Be able to warehouse forms and envelopes in climate-controlled conditions.
- vii. Be able to household merge/purge multiple statements into same envelope (up to 3 into the Standard Mail Out envelope) – 1 Statement with 3 inserts/flyers.
- viii. Be able to accept upgrades to current customer billing system.
- ix. Be able to accept electronic data transmissions 24/7/365.
- x. Be willing and able to establish a business partner relationship with: HTE, Inc. (SunGard), the City of Allen's current Customer Information System vendor and Tyler Technologies (MUNIS), the City of Allen's new Customer Information System currently being implemented.
- xi. Be able to do custom programming as needed.

- xii. Have an emergency backup plan to avoid out of service situations.
- xiii. Provide secure access for online transmission through SSL.
- xiv. Provide a system password per customer that is vendor controlled and will not allow unauthorized access.
- xv. Provide capability to enable batch printing of selectively excluded bills at City of Allen Customer and Utility Services Office.
- xvi. Provide selective/dynamic messaging via secure site for customer messages to be included on bills.

**B. Daily Transmission of Electronic Data Requirements**

- i. AS400 data files are the ones the City utilizes currently. Data format will change with Tyler/MUNIS Utility Billing implementation (target for go-live on October 7, 2019, but this date may change based on unanticipated project delays).
- ii. File transmitted via vendor-provided FTP site. To be approved by City of Allen.
- iii. Vendor shall confirm receipt of file daily by return electronic mail to persons specified by the City of Allen when the file is received.
- iv. Vendor shall provide second report daily when file has been processed for printing.
- v. Vendor shall provide as part of the second report, the amount of postage charges for the billing included in the report.
- vi. File size and billing cycle will be utilized as confirming data.
- vii. Data will be transmitted prior to 10am everyday bills are needed to be processed.

**C. Preprint Requirements**

- i. Selectively exclude bill types from printing (PULL, EBILL, CITY and others identified in the print file).
- ii. CASS certification to ensure lowest possible postage costs.
- iii. Must be able to sort to carrier route level.
- iv. Presorts must conform to latest USPS notification.
- v. Mail merging of bills going to same mailing address up to three into regular #10 mailing envelope and four to one hundred merged for stuffing into one large envelope. Placement of sorter codes must be approved by the City.
- vi. Vendor must have the ability to manipulate print ready data into proper bill format.
- vii. All outgoing mail shall include Zip +4 bar coding conforming to postal requirements for automated processing.

**D. Access to Electronic Bill Image Requirements**

- i. Provide access for city staff via password secured Internet site to exact replicas of customer bills in PDF Format for a period of 12 months.
- ii. Provide access via secured internet site from the City website to customers electing to view exact replicas in PDF format for a period of 12 months. (the City of Allen customer currently sees the pdf is in NetBill. Allen customers sign up for NetBill and they will be able to see and pay their bill. Our customers will need access to view the exact replica of the document via internet access. Vendor shall provide their Online Bill Image and Payment Software Information detail for review/evaluation (if other than NetBill).
- iii. Provide search capability based on account number, date or date range.
- iv. Have capability to email bill image from vendor site.
- v. Provide images for one month electronically through CD or PDF after 12-month period.
- vi. Access to electronic bills will be available via Tyler MUNIS system after go-live.

**E. Approval of Forms and Envelope Orders Requirements**

- i. All orders for print stock and envelopes shall be approved by the City.
- ii. Proofs will be furnished for approval prior to sending to print.
- iii. All artwork becomes the property of the City of Allen at the termination of this contract.
- iv. Pre-printed forms of any kind will not be used.

## **F. Printing Requirements**

- i. All printing shall be laser imaging high quality print with 600 DPI or better.
- ii. 3/0 ink colors; BLUE BLACK and RED, approved by City.
- iii. Print form single sided with two-sided (duplex).
- iv. Bill print fonts include OCRA for automated scanning and processing.
- v. Proofs must be approved by the City with any programming change prior to implementation of changes.

## **G. Envelope and Print Stock Requirements**

### **1. Original and Delinquent Utility Bill:** Vendor to furnish. See attached Sample # 1 and # 4. The sample is for original and delinquent statements and may vary in layout and format.

- i. 8½-inch X 11-inch White bond stock.
- ii. Paper weight is 24/60 pound.
- iii. Top Portion of bill is for customer retention and contains billing information.
- iv. Bottom portion shall be perforated to produce a return stub 8½ inches x 3 5/8 inches to be returned by customer with payment.
- v. Tri fold on perforation to fit a #10 window envelope.

### **2. Envelopes:**

Vendor to furnish. (See attached Sample # 2) Vendor may be requested to deliver up to 4,000 additional envelopes (BRE #10) one time per contract period to City for in-house use. Delivery is F.O.B. Freight Pre-paid to:

City of Allen  
Customer/Utility Billing  
305 Century Parkway  
Allen, Texas 75013

### **3. Mail Out Envelopes:** Vendor to furnish.

- i. Standard BRE #10 window per attached Sample # 2.
- ii. Window size must comply with USPS for utilization of bar code.
- iii. Ability to include return mail processing codes if required.
- iv. Ability to provide customized printing on mail out envelopes at City's request.

### **4. Return Envelopes:** Vendor to furnish.

- i. 3 7/8 in x 8 7/8 in per attached Sample # 3. Shall include security cross-hatching.
- ii. Bar coded for return address.

### **5. Mail Merging Envelope (Mail Out)**

- i. Sufficient size to insert 100 bills into one envelope.
- ii. May use mail label rather than bulk print, prefer addressing on the run with bill printing.
- iii. Additional inserts include (1) return envelope and one of each additional informational insert.

## **H. Utility Bill Folding and Inserting**

- i. Tri Fold statement to fit in Standard #10 mail out envelope.
- ii. One fold shall be on the perforation creating the bill stub.
- iii. Must have multiple page and selective inserting capabilities.
- iv. Inserts include statement, return envelope and up to three (3) additional inserts/flyers.

## **I. Mailing**

- i. Daily (5 days per week).
- ii. Turnaround – data in by 10:00 am, mail out next business day and delivered to USPS bulk processing center.
- iii. Provide daily print and mail turnaround times.
- iv. Provide established time you must be in receipt of The City of Allen file in order to complete that day's address scrubbing run, print run or mail cut off.

- v. Provide cut off time requirements.
- vi. Provide guarantees for turnaround.
- vii. Provide scope of penalties you will incur if you do not meet guaranteed turnaround time.
- viii. Provide "mail marks" that will be visible on envelopes.
- ix. Provide quality control measures you have in place to eliminate "double-stuffs" and other mail-merge problems.
- x. Provide information on how you handle mail that gets damaged while processing/inserting.
- xi. Provide the location/address where the statements will be generated and prepared for mailing.
- xii. Provide post office location(s) that will be utilized for mailing The City of Allen mail.
- xiii. Provide the method of statement delivery to the post office.
- xiv. Provide methods and equipment used for presorting and handling for reduced rates.
- xv. Provide any other information you think is pertinent to the Scope of Work.

**J. Invoicing**

- i. Monthly
- ii. Invoicing should reflect separate services according to proposal form.
- iii. Specify details of special handling bills.
- iv. List number of statements printed for the period.
- v. Only invoice for work completed.

**K. Disaster Recovery Plan**

Provide the backup location/address where the statements would be generated and prepared for mailing in the event of an unforeseen event that prevents operation of the primary facility. Explain procedures to migrate to that facility and associated timelines. If no backup facility is available, please document your backup procedure and associated timelines. Please include other disaster recovery information you would like to provide.

**L. General Information:**

- a. What problems have you encountered recently as an organization that have required changes in your hardware, software and/or processes?
- b. How do you implement such change in your organization?
- c. Provide ideas that could reduce our costs or enhance our revenues.
- d. Provide experience in printing bills generated by HTE (SunGard) / Tyler (MUNIS) Software programs (list references).

**M. Paper Statements & Other Printed Documents Functionality File Transfer/Validation:**

- a. What file layout do you require to create documents?
- b. Can the file layouts be different for different documents we want printed?
- c. Do you provide an FTP site for file transfers?
- d. How do you ensure The City of Allen data is safe during transfer both in route to and from your data center?
- e. How do you ensure the security of data once in your possession?
- f. Do you warrant that the information is not sold?
- g. Explain your encryption methods.
- h. What file validation processes do you have in place to ensure you received the entire file?

**N. File Transfer/Validation:**

- a. Would you archive previously submitted files and contact the Authority should identical files be submitted. If yes, how long would you archive a file?
- b. What other edit checks would you perform?
- c. Please include other file transfer/validation information you would provide.

**O. Address Verification, Standardization and Corrections:**

Describe the processes you will use to verify, standardize, and correct the addresses submitted to you by The City of Allen and related timeframes to mailing, to include:

- a. Coding Accuracy Support System (CASS) certified address standardization. Against how many different standardization systems would you compare our addresses?
- b. Address Element Correction (AEC) through the United States Postal Service (USPS). What turnaround are you experiencing for addresses submitted for AEC?
- c. National Change of Address (NCOA) processing. Do you use electronic NCOA processing or Fastforward? How will you report "moved – left no forwarding address" information back to The City of Allen? Do these letters get mailed and charged or can you suppress their printing?
- d. Postal endorsements (i.e. Address Service Requested). Will you report USPS changes to The City of Allen electronically or will we receive paper-based information from the USPS?
- e. Has your organization earned USPS "Postal One" status and do you have Postal One computers and software installed at your facility?
- f. Do you offer skip-tracing?
- g. Do you suppress printing and mailing for addresses that are not valid?
- h. Will the City of Allen be charged for mail that is undeliverable?
- i. How would you alert The City of Allen with corrected addresses? Can you send these corrections electronically?
- j. Please include other address verifications and correction information you would like to provide.

**IV. Environmental Attributes Option**

The City of Allen encourages vendors to offer Environmentally Preferable Products (EPP) according to the City's Environmental Purchasing Policy that can be found on the City of Allen Purchasing website.

The Vendor should propose options in support of the policy for the following:

- Vegetable-based and recycled (filtered) inks; avoid inks containing heavy metals.
- Papers and envelopes made with post-consumer fiber (30 percent minimum) and other environmentally preferable paper fibers.
- Processed chlorine-free papers.

**V. Training**

Vendor is required to provide training as needed to ensure continuity of the process.

**VI. Warranty**

Be responsible for all costs associated with errant printing and mailing of statements due to no fault of the City.

**VII. Work History**

Vendor shall have successful work history with three companies or governmental agencies within the last three years of this scope and size.

Service Provider should possess a minimum of three (3) years industry-specific experience with customer information/billing systems, the ability to utilize HTE (SunGard) / Tyler (MUNIS) Software, have successfully provided the same or similar services to public and/or private sector utilities of a size approximately equal to or greater than that of the City of Allen.

Service Provider shall certify that it neither exercises and nor holds any interest in the products and systems in the marketplace which may be considered for implementation; that it is financially independent of related vendor and product providers; and that it is in a position to provide unbiased and objective recommendations and opinions to The City of Allen.

## **SECTION IV**

### **PROPOSAL CONTENT & EVALUATION CRITERIA**

#### **EVALUATION PROCESS**

The objective of this evaluation process is to identify and select the proposer with the best satisfies the requirements of the City of Allen. All proposals received by the submission deadline will be evaluated by the City of Allen evaluation committee. The evaluation committee will review, rate, and rank each proposer's proposal in accordance with the weighted criteria contained in this document.

#### **EVALUATION CRITERIA**

PLEASE NOTE THAT THIS BID WILL BE AWARDED ON THE BASIS OF "BEST VALUE". The award to the successful bidder will be determined by best value to the City of Allen as allowed by Chapter 252 of the Local Government Code. The following criteria will be considered when selecting a contractor:

- the purchase price;
- the reputation of the bidder and the bidder's services;
- the quality of the bidder's service;
- the extent to which the bidder's services meet the City's needs;
- the bidder's past business relationship with the City.

#### **PROPOSAL RESPONSE DOCUMENTS**

In order to be considered responsive, the Bidder shall submit with their Bid Proposal, such documentation as is necessary or required to attest to the company's capabilities and qualifications to perform the work as specified and all aspects of this contract in a competent and expeditious manner.

Please provide a sample with bid submittal.

**QUALIFICATIONS**  
**REQUEST FOR PROPOSAL 2019-6-61**  
**Utility Billing Printing and Mailing Services**

**BIDDER QUALIFICATIONS**

Each respondent to this proposal shall be capable of meeting the following minimum requirements:

1. Proposers must demonstrate that they have the resources and capability to provide services per the RFP document, specifications/requirements.
2. Proposers must demonstrate that they are financially stable and provide a brief historical perspective of your company (years in business, growth via mergers and acquisitions, key industry innovations). Provide an overview of your company's growth over the past five years.
3. Proposers must submit with their bid proof of insurance. The awarded contractor must provide the city with their certificate of insurance, meeting all the city's insurance requirements within five (5) working days of award notification. Failure to provide the city with a certificate of insurance, meeting all the city's insurance requirements within five (5) working days of award notification may result in the city awarding the contract to another vendor.
4. Provide the number of employees in your organization and the number allocated to performing the services you are proposing in response to this RFP.
5. Describe your corporate and regional offices, print center(s), data center(s) and customer support locations.
6. Describe your relationship with other companies to be utilized in fulfilling the services you are proposing in response to this RFP.
7. Describe the qualities that differentiate your company from your competitors. Explain why you think that your firm is the best candidate to be selected for award of this contract. Vendor shall provide any other value-added options available that may not be listed in this RFP (if any).
8. Provide detailed solution and work plan, to include in-house printing that meets and/or exceeds the requirements and service specifications of this proposal.
9. Proposers must submit with their proposal a list of at least three current or past references [within one (1) year]. References should include a contract name, email address and telephone number for jobs/contracts in the Public and/or Private sectors that are equal to size and scope of the City of Allen's requirements, provided herein. Vendor shall provide three (3) Client References and submit as provided on the Client Work History in Section VI, Exhibit 4.
10. Vendor shall provide the FTP website for data exchange for City approval.
11. Vendor shall provide their Online Bill Image and Payment Software Information detail for review/evaluation.
12. Explain your firm's options as it relates to customer password utilizing software (as provided above).
13. Samples of your Bills/Envelopes are required to be submitted with your RFP response, per specifications/requirements listed herein.
14. If the data format needs tweaking or minor adjustments need to be made due to program changes, outside of the City's control, no fees shall be assessed to the City. How will your company handle minor format adjustments?
15. Because we will be implementing a new ERP system (changing from H.T.E./SunGard to Tyler/MUNIS software), what fees will be involved to make this change-over?
16. Provide us with details/information that will ensure us that this will be a seamless transition.



## **COMPANY OVERVIEW**

Respondent shall provide the following information with their submission, including a brief company overview, history, and financial status:

1. Firm name, address, phone number, and date established.
2. Address and location of the local responsible office.
3. Name of office principals, their experience and professional qualifications.
4. Describe your firm's experience in providing like services including the number of years your firm has actively provided such services.
5. Provide a complete and current listing of all industry certifications, accreditations and affiliations your firm holds.
6. Describe whether your firm has ever undergone an investigation by an outside agency pursuant to the filing of claims and describe the outcome of the investigation including ramifications to your firm or your firm's client cities.

## **REFERENCES**

1. Vendor shall have a minimum of TEN (10) years of experience

Does your firm meet this requirement? \_\_\_\_Yes \_\_\_\_No

2. Minimum of two references installed 5-8 years ago.
3. Proposers must submit with their proposal a list of at least five (5) current references.

References should include a contact name, email address and telephone number for jobs/contracts in the Public and/or Private Sectors that are equal to the size and complexity of the City of Allen's requirements, provided herein.

## **PROPOSAL RESPONSE DOCUMENTS/ PROPOSAL FORMAT AND CONTENT**

The City of Allen discourages lengthy and costly proposals, however, in order for the City to evaluate proposals fairly and completely, proposers should follow the format set out herein and provide the information requested.

In order to be considered as responsive, the Proposer shall submit with their Proposal, such documentation as is necessary or required to attest to the company's capabilities and qualifications to perform the work as specified and all aspects of this contract in a competent manner. RFP responses shall be submitted professionally to include clearly identifiable sections, in the same order for each section as required. Also, include the RFP Pricing.

### **Response document checklist:**

- |                          |            |  |
|--------------------------|------------|--|
| <input type="checkbox"/> | Section V  | RFP Price Form   |
| <input type="checkbox"/> | Section V  | Bid Endorsement and Addenda Acknowledgment (if addenda issued) |
| <input type="checkbox"/> | Section VI | Exhibit 1 - Certificate of Insurance                           |
| <input type="checkbox"/> | Section VI | Exhibit 2 - Affidavit of No Prohibited Interest                |
| <input type="checkbox"/> | Section VI | Exhibit 3 - Conflict of Interest                               |
| <input type="checkbox"/> | Section VI | Exhibit 4 - Bidder Qualifications                              |
|                          |            | <b>Section IV/Company Overview Statement/References</b>        |
| <input type="checkbox"/> | Section VI | Exhibit 5 - Supplemental Information                           |
|                          |            | <b>+Sample Bills/Envelopes</b>                                 |
| <input type="checkbox"/> | Section VI | Exhibit 6 - Vendor Application & W9                            |
| <input type="checkbox"/> | Section VI | Exhibit 7 - Bid Bond   |
| <input type="checkbox"/> | Section VI | Exhibit 8 - Samples (Bills/Envelopes)                          |

**EVALUATION PROCESS AND SELECTION CRITERIA**

The objective of this evaluation process is to identify and select the proposer that best satisfies the requirements of the City of Allen. The City of Allen's staff that will be responsible for these services will evaluate all proposals received by the submission deadline. The evaluation committee will review, rate and rank each proposer's proposal in accordance with the weighted ranking criteria contained in this document. RFP responses shall remain confidential until the contract has successfully been awarded.

If deemed necessary to the evaluation process, the City reserves the right to conduct presentations/interviews with proposers at no cost to the city.

There are 100 possible points for this proposal evaluation, as follows:

<b>PRICE</b>	<b>30 points</b>
<b>BIDDER QUALIFICATIONS AND EXPERIENCES</b>	<b>20 points</b>
<b>PROPOSAL OF SERVICES</b>	<b>50 points</b>

**SECTION V**  
**PRICING**

**CITY OF ALLEN**

*Estimated Annual Volume (informational only based on historical data)*

Utility Bill Statements	400,000
Delinquent Bill Statement	36,000

Price per bill for a one-page bill, with return envelope (all inclusive)  
**(cost per each)** \$\_\_\_\_\_

Price per bill for a one-page bill, without return envelope (all inclusive)  
**(cost per each)** \$\_\_\_\_\_

Optional pricing for Environmental Attributes as referenced  
in Section III/Specifications/# IV.  
**(cost per each)** \$\_\_\_\_\_

Price for offset printing inserts  
**(cost per each)** \$\_\_\_\_\_

Price per additional insert over 3 inserts  
**(cost per each)** \$\_\_\_\_\_

Price per unit for printing on Mail Out envelope (not on return envelope)  
**(cost per each)** \$\_\_\_\_\_

Fees for changing from H.T.E./SunGard to Tyler/MUNIS Software  
**(provide total cost proposal)** \$\_\_\_\_\_

Other Costs (Provide Below):

\_\_\_\_\_ \$\_\_\_\_\_

\_\_\_\_\_ \$\_\_\_\_\_

Vendor shall provide information concerning any additional costs that may be incurred, that may not be listed herein:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## BID ENDORSEMENT

The undersigned, in submitting this bid proposal and their endorsement of same, represents that they are authorized to obligate their firm, that they have read this entire bid proposal package, is aware of the covenants contained herein and will abide by and adhere to the expressed requirements.

Submittals will be considered as being responsive only if entire Bid Package plus any/all attachments is returned with all blanks filled in.

SUBMITTED BY:

---

(OFFICIAL Firm Name)

By: \_\_\_\_\_

(Original Signature) **Must be signed to be considered responsive**

---

(Typed or Printed Name)

---

(Title)

(Date)

Remittance

Address: \_\_\_\_\_

\_\_\_\_\_ (Zip Code)

Phone #: (\_\_\_\_) \_\_\_\_\_

Fax #: (\_\_\_\_) \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

If an addendum is issued for this bid, please acknowledge receipt.

### ADDENDUMS/AMENDMENTS:

1) \_\_\_\_\_ date acknowledged

2) \_\_\_\_\_ date acknowledged

3) \_\_\_\_\_ date acknowledged