



Request for Proposals

PRINT PROCESSING AND MAILING SERVICES

**Proposals Will Be Received Until
12:00 Noon, Thursday May 14, 2020**

**By The City of W-S/Forsyth Co. Purchasing Department
In Room 324 City Hall Building
101 North Main Street
Winston-Salem, North Carolina**

A **pre-proposal teleconference** will be conducted at **10:00 AM, Friday, May 1, 2020** via Conference Call at (402) 409-0142 PIN: 160 617 514# The teleconference is not mandatory, but we believe that the information provided through the conference will be of benefit to anyone wishing to submit a proposal. The conference call will not be recorded and the information from the meeting will not be distributed to bidders that do not participate in the call-

ADVERTISEMENT FOR PROPOSALS

COUNTY OF FORSYTH
FOR
PRINT PROCESSING AND MAILING SERVICES

Pursuant to Section 143-129 of the General Statutes of North Carolina, sealed proposals endorsed **“Print, Processing, and Mailing Services”** will be received by the City/County Purchasing Department by emailing the completed Proposal per instructions within this document or delivered to Room 324, City Hall Building, 101 North Main Street, Winston-Salem, NC 27101, until Thursday May 14, 2020. **Late Proposals will not be considered.** Instructions for submitting proposals and complete specifications are included in this Proposal document and may be obtained at the office of the City/County Purchasing Department, City Hall Room 324, 101 N. Main Street, Winston-Salem, NC during normal working hours (8:00 A.M. to 5:00 P.M., Monday-Friday) or from the contact information below. The County reserves the right to reject any or all proposals.

Jerry Bates
City/County Purchasing Director
City of Winston-Salem/Forsyth County
(336) 747-6939
jerryjb@cityofws.org

Notice to Proposers

It is the policy of the County of Forsyth that an employee, officer, or agent of the County may not participate in any manner in the bidding, awarding, or administering of contracts or agreements in which they, or a member of their immediate family, their business partner, or any organization in which they serve as an officer, director, trustee, or employee, have a financial interest.

The successful Proposer must comply with all provisions of the Americans with Disabilities Act (ADA) and all rules and regulations promulgated thereunder. By submitting a proposal, the successful Proposer agrees to indemnify the County from and against all claims, suits, damages, costs, losses, and expenses in any manner arising out of, or connected with, the failure of the Company, its subcontractors, agents, successors, assigns, officers, or employees to comply with the provisions of the ADA or the rules and regulations promulgated thereunder.

All proposals must be firm and not subject to increase, unless specified within the provisions of this Request for Proposals (RFP) and mutually agreed upon by the County and the Proposer.

No special inducements will be considered that are not a part of the original proposal document.

County Rights and Options

The County, at its sole discretion, reserves the following rights:

- To supplement, amend, substitute or otherwise modify this RFP at any time
- To cancel this RFP with or without the substitution of another RFP
- To take any action affecting this RFP, this RFP process, or the Services subject to this RFP that would be in the best interests of the County
- To issue additional requests for information or clarification from Offerors or to allow corrections of errors or omissions
- To require one or more Service Providers to supplement, clarify or provide additional information in order for the County to evaluate the Responses submitted
- To negotiate an agreement with a Service Provider based on the information provided in response to this RFP.
- This Request for Proposal does not obligate Forsyth County to contract for services specified herein.

Public Records

Any material submitted in response to this RFP will become a "public record" once the Proposer's document(s) is opened and the Proposer is determined to be a participant in the solicitation process and shall be subject to public disclosure consistent with Chapter 132, North Carolina Statutes. Proposers must claim any applicable exemptions to disclosure provided by law in their response to this RFP. Proposers must identify materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary and legal. The County reserves the right to make all final determination(s) of the applicability of North Carolina General Statutes § 132-1.2, Confidential Information.

Trade Secrets/Confidentiality

Proposers must claim any material which qualifies as "trade secret" information under N.C.G.S. 66-152(3) in their response to this RFP and must state the reasons why such exclusion from public disclosure is necessary and legal.

To properly designate material as trade secret under these circumstances, each Proposer must take the following precautions: (a) any trade secrets submitted by a Proposer should be submitted in a separate, sealed envelope marked "Trade Secret - Confidential and Proprietary Information - Do Not Disclose Except for the Purpose of Evaluating this Proposal," and (b) the same trade secret/confidentiality designation should be stamped on each page of the trade secret materials contained in the envelope.

Notice to Proposers

Do not attempt to designate your entire proposal as a trade secret, and do not attempt to designate pricing information as a trade secret. Doing so may result in your proposal being disqualified.

In submitting a proposal, each Proposer agrees that the City/County may reveal any trade secret materials contained in such response to all City/County staff and City/County officials involved in the selection process.

Familiarity with Laws and Ordinances

The submission of a proposal on the equipment and services requested herein shall be considered as a representation that the Proposer is familiar with all federal, state, and local laws, ordinances, rules and regulations which affect those engaged or employed in the provision of such services, or equipment used in the provision of such services, or which in any way affects the conduct of the provision of such services; and no plea of misunderstanding will be considered on account of ignorance thereof. If the Proposer discovers any provisions in the RFP documents that are contrary to or inconsistent with any law, ordinance, or regulation, it shall be reported to the County in writing without delay.

E-Verify Compliance

Per N.C.G.S. 143-133.3“E-VERIFY. Provider shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes. Further, if the Provider utilizes a subcontractor, the Provider shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.”

Iran Divestment Act

Provider hereby certifies that it is not on the North Carolina State Treasurer’s list of persons engaging in business activities in Iran, prepared pursuant to NCGS 147-86.58, nor will Provider utilize on this agreement any subcontractor on such list. This list, along with additional information about the Iran Divestment Act, is available on the Treasurer’s Office site:

<https://www.nctreasurer.com/inside-the-department/OpenGovernment/Pages/-Divestment-Act-Resources.aspx>

Divestment from Companies that Boycott Israel

Contractor hereby certifies that it is not on the North Carolina State Treasurer’s list of companies engaged in a boycott of Israel in violation of NCGS 147-86.80 et. seq. and that it will not utilize on this agreement any subcontractor on said list.”

Instructions to Proposers

INTRODUCTION:

This entire set of documents constitutes the RFP. The proposer must return the RFP with all information necessary to properly analyze the proposer's response in full, in the same numerical order in which it was issued. Proposer's notes, exceptions, and comments may be rendered on an attachment, provided the same format of this RFP text is followed.

RFP Response Submission

Bidders may submit a bid electronically or by hardcopy. Electronic bids should be submitted by attaching a single file of the required bid forms to an email entitled, "**BID - Print, Processing, and Mailing Services – FB20257**" and emailed to: jerryjb@cityofws.org. Such submission will not be opened until the time for receiving bids has come.

If mailing a hardcopy proposal, place the bid in a sealed envelope inside the courier's envelope and label it "BID ENCLOSED". The inner envelope should be clearly labeled "**Print, Processing, and Mailing Services – FB20257**" with company name and bid opening date/time. Submit hardcopy proposals in a sealed container/envelope containing one original (**please mark document as original**) proposal showing original signatures and seals, and **two (2) copies** of the complete proposal to the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, 27101 **by 12:00 Noon, Thursday, May 14, 2020**. **In addition** to the three (3) paper copies, **please include one (1) electronic copy of your proposal in PDF format** on flash drive, CD, or other electronic media containing only the information included in the hard copy version of the proposal, clearly labeled with the Company and RFP name. Bids received prior to the advertised hour of opening will be securely kept unopened. The bidding agent will open them when the specified time has arrived, and no Bid received thereafter will be considered. **Late proposals will not be considered.**

The County will not be obligated for the expenses of any provider arising out of preparation and/or submittal of responses to this RFP. Any and all proposals to this RFP are to be prepared at the cost and expense of the respondents, with the express understanding that there may be no claims whatsoever for the reimbursement of any costs, damages, or expenses relating to this procurement from the County or any other party for any reason (including the cancellation of this RFP).

Proposals must be made in the official name of the individual, firm, or corporation under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the business entity submitting the proposal.

All proposals should be complete and carefully worded and must convey all of the information requested by the County. If errors or exceptions are found in the proposal, or if the proposal fails to conform to the requirements of the RFP, the County will be the sole judge as to whether that variance is significant enough to reject the proposal.

Proposals should be prepared simply and economically. All data, materials, and documentation shall be available in a clear, concise form. The County reserves the right to reproduce proposals for internal use in the evaluation process.

Proposers are expressly forbidden from contacting any other County employee or Forsyth County elected official regarding this Request for Quotations. Any such outside contact may result in disqualification from the request for proposal process.

Proposer Questions and Inquiries

Proposer Questions and Inquiries relative to this RFP must be submitted **in writing only** **by 12:00 Noon, Thursday, May 7, 2020**, to Jerry Bates, City/County Purchasing Director, 101 North Main Street, Winston-Salem, NC 27101 or e-mail: jerryjb@cityofws.org (**Email is preferred**), Fax: (336) 727-2443. The County will provide written responses to all inquiries received by this date, and responses will be made available to all recipients of this RFP. Any oral responses made by any representative of the County may not be relied upon. Any supplements or amendments to this RFP will be in writing and furnished to potential bidders.

► All proposals should include a signed acknowledgement of any addendums issued.

FORSYTH COUNTY
GENERAL CONDITIONS AND INSTRUCTIONS

- 1) The County reserves the right to reject any or all bids, to waive informalities in the bids, and to choose the bid that is in the best interests of the County.
- 2) In accordance with State Law (G.S. 143-129), the award will be made to the lowest responsible bidder taking into consideration quality, performance and time specified in the proposal for the performance of the contract.
- 3) All bids must be firm and not subject to increase.
- 4) No special inducements will be considered that are not a part of the original bidding document.
- 5) **All signatures must be original hand-written in ink.**
- 6) Pursuant to N.C.G.S. Chapter 55 Article 15 entitled Foreign Corporations, the successful bidder must have on file with the Secretary of State of the State of North Carolina a Certificate of Authority to transact business in this state.
- 7) Due to the importance of all Contractors having a clear understanding of the specifications and requirements of this solicitation, a conference of potential Contractors will be held on the date specified on the cover page. Bring a copy of the solicitation with you. Any changes resulting from this conference will be noted in a written amendment to the solicitation.
- 8) Invoicing Instructions: Send invoices to: Forsyth County Tax Administration, Attn: Tisha Leach, 201 N. Chestnut Street, Winston-Salem, NC 27101 or Forsyth County Board of Elections, Attn: Kim Stuck-Yarbrough, 201 N. Chestnut Street, Winston-Salem, NC 27101. Must be able to provide separate invoices to Tax Administration and Board of Elections.
- 9) **IMPORTANT NOTE:** Indicate firm name on the front of each sealed proposal package along with the statement: "Print Processing and Mailing Services".

By signing below the Proposer agrees to the following:

The Proposer agrees that in carrying out this agreement, compliance will be maintained with all applicable federal, state, and local laws, specifically including, without limitations, the Occupational Safety and Health Act of 1970 and Section 1324A, the Immigration Reform and Control Act.

The Proposer certifies that the proposal is made in good faith and without collusion with any person submitting a proposal in response to this RFP or with any officer or employee of the County of Forsyth

The undersigned further agrees, in connection with the performance of this agreement, not to discriminate against any employee or applicant for employment because of race, religion, color, gender, age, handicap, political affiliation or national origin.

This signature page must be completed and submitted with the proposal:

PROPOSAL AUTHORIZATION AND SIGNATURE

The signature page must be completed and submitted with the proposal: Proposals are to be signed by an officer of the company authorized to bind the submitter to its provisions. Failure to manually sign the appropriate proposal form will disqualify the proposer and the proposal will not be considered.

Firm Name

Authorized Signature (**Notarized**)

Date

Street Address (P.O. Box)

Federal Identification No.

City, State and Zip Code

Telephone Number

Email Address

On this ____ day of _____, 20____ before me _____
(name)

to me personally known, being duly sworn, did execute the foregoing proposal, and did so state that

he/she was properly authorized by _____
(Company name)

to execute the proposal and did so on his/her free act and deed.

SEAL

Notary Public _____ My commission expires _____

The following information is requested for statistical purposes only. The provision or omission of this information will neither affect nor influence the award of this contract. Bidder further certifies that:

We () are a Historically Underutilized Business (HUB) certified by State of North Carolina.

We () are a minority business enterprise.

() are not a minority business enterprise.

If yes, please identify in the appropriate box below:

() Black

() Hispanic

() Asian American including Indian Subcontinent and Pacific Islands

() Native American Indian including Eskimos and Aleuts

We () are a woman-owned business concern.

() are not a woman-owned business concern

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1) Introduction

The objective of this Request for Proposal (RFP) is to identify an experienced, reliable Supplier to provide Forsyth County Tax Administration, and Board of Elections, herein referred to as “County” with printing, inserting, and mailing services of bills, letters, forms, statements, invoices, reports, past due notifications, voter information cards, confirmation of voter registration cards, change of address, and voter ID mailings, herein referred to as “notices” and “cards”.

Forsyth County desires to provide the best possible customer service at the lowest possible cost. For the purpose of this RFP, lowest price does not only refer to the actual cost of services delivered by the Supplier, but also the lowest cost of postage achieved by maximizing postal discounts and the best use of notice design and sizes. Though this RFP requests that the Supplier provided costs for all printing and mailing services, the County may elect to keep some items like form printing, envelope printing, card printing, or processing of small jobs in house.

If Forsyth County enters into a contract as a result of this RFP, it will be an “Established Price Contract” with “Escalation Contract” containing the Terms and Conditions as part of this contract. The Supplier will generate notices from templates provided by the County, its software (NCPTS and SEIMS) vendor and data files produced from the County. The files may be fixed length text files, delimited files, excel ® files, access ® files or other formats produced from the County’s software and processes. **The accepted print vendor must work jointly with the County, NC State Board of Elections, Farragut System and the Digital Vendor to produce and coordinate the issuance of all documents.**

This document is intended to establish and define a clear set of functional requirements to be satisfied by the Supplier. It will also provide overall direction to the Supplier in submitting proposals that will best respond to the County’s printing and mailing needs.

a. Background Information

The County intends to outsource **portions** of its Document Production and Distribution Services. This RFP sets forth the requirements for all document production and distribution services and solicits a detailed response from the Suppliers to include pricing and service descriptions in a specified format described within this document.

b. General Conditions of RFP

This RFP is not an offer of contract. Acceptance of the proposal does not commit the County to award the contract to any one Supplier, even if all requirements are met. In addition, the County reserves the right to negotiate in our best interest and to contract with a Supplier for reasons other than lowest price. Failure to answer any/all questions in this RFP may subject the proposal to disqualification. The County is seeking a turnkey solution and failure to meet a qualification or requirement will subject a proposal to disqualification.

Upon completion of evaluation, the County will expect to enter into a mutually agreed upon contract with the Awarded Supplier. In the event that the County and the Supplier cannot come to an agreement, the negotiations with that Supplier will be formally canceled. The County shall then undertake negotiations with the Supplier ranked second in qualifications. Shall the County be unable to negotiate a contract, the County reserves the right to accept another proposal meeting specifications.

c. Contract – Term of Contract

The term of the contract shall commence on the effective date (as defined below) and shall end on the expiration date identified in the contract subject to the other provisions of the contract. The effective date shall be the effective date printed on the contract after the contract has been fully executed by Forsyth County. The contract will be for four years, so long as the County does **not** provide written notice to the Supplier of its intention to withdraw from the contract by letter post marked not less than **sixty (60) days** prior to the expiration of the term of the agreement, or any extension thereof, or the Supplier provides notice to the County of the intention to withdraw from the contract by letter post marked at least **one hundred twenty (120) days** prior to the expiration of the term of the existing term. These notification requirements include any request by the Supplier or the County to renegotiate the terms of the agreement.

d. Service Requirements

1. The County has defined a set of mandatory requirements that are included in this RFP
2. Contractor shall have prior experience performing similar work for a County or similar governmental entity where accuracy and timeliness are critical.
3. Supplier shall meet all required certifications/compliance requirements. Example, HIPPA compliance.
4. Supplier shall be a full-service supplier who is capable of providing **all** services requested including presorting, artwork, programming and presentation of bills, statements, and summons in various data types such as, pdf, txt, doc, xml, html, rpt, etc.
5. The response to the RFP **shall** include the ability for the County to adjust the print volume by +/- 20% per year and add or remove forms as necessary.
6. The County prefers that all printing/mailing work be performed near Winston-Salem; if, however, that is not possible the County will need to be aware of where the printing/mailing will be performed.
7. It is **required** that all mail be **postmarked** in the USPS facility located nearest to Winston-Salem, NC
8. The existing County printing/inserting equipment located in the County Datacenter is not available for use.

e. Contractual Requirements

1. The County expects the selected Supplier to comply with all contractual requirements listed below as to expectations, payments, and performance.
2. The Company must be registered with the North Carolina Secretary of State as doing business in North Carolina and the contract will be executed and governed by the laws of North Carolina.
3. The Supplier shall permit Forsyth County representatives to inspect the supplier's facility prior to entering into a contract with Forsyth County and anytime with notification during the life of the contract.

4. **Contract-Performance Security:** The Awarded Supplier is required, no later than ten (10) days after the Contract Effective Date, to submit Performance Security in the amount of \$100,000. Performance Security must be in the form of Specific Performance Bond, an irrevocable Letter of Credit, or a Certificate of Deposit, all in a form acceptable to Forsyth County or a certified check or bank cashier's check drawn to the order of Forsyth County. All Performance Security shall be conditioned for faithful performance of the contract or purchase order(s). Failure to provide Performance Security within 10 days after the contract effective date shall be considered an event of default, at that time Forsyth County will consider its next course of action.
5. **Quality Control:** The quality of these documents is very important. The quality and methods of the selected supplier must be "Zero Defects". Each bidder must submit with their bid submission their plan for accomplishing the "Zero Defects" quality process for the production of these documents.
6. **Subcontracting:** The Awarded Supplier is prohibited from subcontracting or outsourcing any part of this contract without the express written consent of Forsyth County. Details of any planned subcontracting or outsourcing must accompany this RFP.
7. **Other Mail Services:** The Tax Department is currently working with Peachtree Data to provide NCOA and ACS services to the addresses located in our database. Updates are performed semi-annually before the preparation of listings and the preparation of annual bills. In addition, all addresses for registered motor vehicle bills are updated before they are added to our database. If this service is provided by the vendor, the cost must be equal to or lower than those cost provided by Peachtree Data and updates must be returned to the County in a format that allows the County to apply the address information to the County databases prior to the mailing of any notices. Contact the Forsyth County Tax Administration for additional information. The Board of Elections will continue to receive their NCOA data from the State Board of Elections and will not affect the transmission of such data to the supplier.
8. The contract will require the following properties:
 - a) The RFP Supplier's response, and all clarifications shall be part of the final contract and Proposal
 - b) Termination Clause: Supplier shall agree to a 60-day contract termination clause by the County for any reason and shall be delivered in writing.
 - c) Prices shall be held firm for 120 days from date of contract execution.
 - d) **Liquidated Damages:** Unless Forsyth County Purchasing Department grants an extension of time in writing, the Supplier shall pay the sum of \$100.00 plus one (1%) of the total cost of the job as the agreed Liquidated Damages to Forsyth County for each working days delay in delivering the printed items required by each order. The County shall deduct Liquidated Damages from the amount due to the Supplier.

f. Insurance Requirements

The contract requires the following minimum insurance requirements.

1. The Contractor shall procure and maintain insurance against claims for injuries to persons or damages to property for the duration of the contract which may arise from or in connection with the performance of work hereunder by the Contractor, his agents, representatives, or subcontractors.
 - e) Commercial General Liability Insurance. The Contractor shall maintain occurrence version commercial general liability insurance or equivalent form with a limit of not less than \$1,000,000 each occurrence. If such insurance contains a general aggregate limit, it shall be no less than two times the occurrence limit. Such insurance shall:
 - f) Include the County, its officials, officers, and employees as additional insureds with respect to performance of the Services. The coverage shall contain no special limitation on the scope of protection afforded to the above listed insureds. Additional Insured should read Forsyth County Finance Department, 201 North Chestnut Street, Winston-Salem, NC 27101.
 - g) Be primary with respect to any insurance or self-insured retention programs covering the County, its officials, officers and employees.
 - h) Business Automobile Liability Insurance. The Contractor shall maintain business automobile liability insurance or equivalent form with a limit of not less than \$1,000,000 each accident. Such insurance shall include coverage for owned, hired, and non-owned automobiles.
 - i) Workers' Compensation and Employers' Liability Insurance. The Contractor shall maintain workers' compensation insurance with North Carolina statutory limits and employers' liability insurance with limits of not less than \$100,000 each accident.
 - j) Professional Liability Insurance. The Contractor shall maintain professional liability insurance coverage with a limit of not less than \$1,000,000 each occurrence. If such insurance contains a general aggregate limit, it shall be no less than two times the occurrence limit. Such insurance shall:
 1. Include the County, its officials, officers, and employees as additional insureds with respect to performance of the Services. The coverage shall contain no special limitation on the scope of protection afforded to the above listed insureds. Additional Insured should read Forsyth County Finance Department, 201 North Chestnut Street, Winston-Salem, NC 27101.
 2. Be primary with respect to any insurance or self-insured retention programs covering the County, its officials, officers and employees.
 - k) Other Insurance Requirements. The Contractor shall:
 1. Prior to commencement of services, furnish the County with properly executed certificates of insurance which shall clearly evidence all

insurance required in this section and provide that such insurance shall not be cancelled, allowed to expire, or be materially reduced in coverage except on 30 days prior written notice to the County.

2. Provide certified copies of endorsements and policies, if requested by the County, in lieu of or in addition to certificates of insurance.
 3. Replace certificates, policies, and endorsements for any such insurance expiring prior to completion of the services.
 4. Maintain such insurance from the time services commence until services are completed.
 5. Place such insurance with insurers authorized to do business in North Carolina and having A.M. Best Company ratings of not less than A:VII. Any alternatives to this requirement shall require written approval of the County's Risk Manager.
1. The Contractor understands and acknowledges that these insurance coverage requirements are minimums and that they do not restrict or limit the hold harmless

2) General Description of Current County Print Environment

The following pages identify the documents that are currently produced by the Tax and Board of Elections office. The list is representative of the documents produced, but is not exhaustive.

Where feasible, the County prefers to use the mail vendor to process as many of our mass mailings as possible. Most documents produced by the Tax and Board of Elections offices are produced from an extract created through the NCPTS software (Supported by Farragut Systems) and SEIMS (Supported by the NC State Board of Elections). The vendor is required to develop forms that are capable of displaying the data provided in the file and produce custom data and language based on specific criteria within the file. In addition, the County may provide files containing PDFs of completed documents to be printed, inserted with appropriate attachments and mailed.

FORSYTH COUNTY DEPARTMENT FORMS														
Department	Form Description	Frequency	Estimated Volume	Form Type	Static Back	Ink	Perforated Coupon	Unique Scan Line, Static QR Code, 2d Square Bar Code	Mailing Envelope	Return Envelope	Selective Messages	Special Inserts	Mail Time	Proofs Req'd
Business Personal	Business Listings (Required)	Annual (December)	12,000	Duplex/ Multi Page	No	(2) Black /Blue	No	Yes	Assessment (Multiple Owners combined in Custom)	Color Coded	Yes	Up to 1	5 Day	Yes
Collections	Beer & Wine (Required)	Annual (March)	800	Duplex	No	(2) Black / Blue	Yes	Yes	Collections	Color Coded	Yes	Up to 1	3 Day	Yes
Collections	Annual Billing GAP (Required)	Annual (August)	8,000	Duplex	No	(2) Black /Blue	Yes	Yes	Collections (Multiple Owners combined in Custom)	Color Coded	Yes	Up to 1	5 Day	Yes
Collections	Annual Billing REGULAR (Required)	Annual (July)	172,000	Duplex/ Multi-page	No	(2) Black /Blue	Yes	Yes	Collections (Multiple Owners combined in Custom)	Color Coded	Yes	Up to 1	5 Day	Yes
Delinquent Collections	Debt Setoff (Required)	Annual (Jan/Feb)	12,000	Duplex	No	(2) Black /Blue	Yes	Yes	Collections (Multiple Owners combined in Custom)	Yes	Yes	Up to 1	2 Day	Yes

FORSYTH COUNTY DEPARTMENT FORMS														
Department	Form Description	Frequency	Estimated Volume	Form Type	Static Back	Ink	Perforated Coupon	Unique Scan Line, Static QR Code, 2d Square Bar Code	Mailing Envelope	Return Envelope	Selective Messages	Special Inserts	Mail Time	Proofs Req'd
Delinquent Collections	Advertisement Warning (Real Only) (Required)	Annual (Feb)	12,000	Duplex	No	(2) Black /Blue	Yes	Yes	Collections (Multiple Owners combined in Custom)	Yes	Yes	Up to 1	2 Day	Yes
Delinquent Collections	Past Due, Regular Levy (Required)	Annual (Jan)	30,000	Duplex	No	(2) Black /Blue	Yes	Yes	Collections (Multiple Owners combined in Custom)	Yes	Yes	Up to 1	2 Day	Yes
Personal Property	Listings (Required)	Annual (Dec)	13,000	Duplex/ Multi Page	No	(2) Black /Blue	No	Yes	Assessment (Multiple Owners combined in Custom)	Color Coded	Yes	Up to 1	5 Day	Yes
Real Estate	Real Estate Listing Letters	Annual (Jan)	160,000	Duplex	No	(2) Black /Blue	No	Yes	Assessment (Multiple Owners combined in Custom)	No	Yes	Up to 1	5 Day	Yes
Real Estate	Real Estate Listing Post Card (option in lieu of Real Listing Letter	Annual (Jan) in absence of Real Estate Listing Letters	160,000	Post Card with a return pressure seal	No	(2) Black /Blue	No	Yes	Assessment	No	Yes	No	5 Day	Yes

FORSYTH COUNTY DEPARTMENT FORMS														
Department	Form Description	Frequency	Estimated Volume	Form Type	Static Back	Ink	Perforated Coupon	Unique Scan Line, Static QR Code, 2d Square Bar Code	Mailing Envelope	Return Envelope	Selective Messages	Special Inserts	Mail Time	Proofs Req'd
Real Estate	Real Estate Value Change Notice	Monthly/ Weekly	10,000 Annually	Post Card	No	(2)Black /Blue	No	Yes	No	No	Yes	No	2 Day	Yes
Real Estate	Revaluation Value Notice (Required)	Revaluation Estimated Jan 2021	175,000 (Once Per Four Years)	Duplex/ Multi Page	No	(2) Black /Blue	No	Yes	Assessment (Multiple Owners combined in Custom)	Yes	Yes	Up to two extra	5 Days	Yes
(Optional)	Insert		150,000	White Tri-Fold										
(Optional)	Insert		150,000	¼ page insert on colored paper										
(Optional)	Fee for Preprinted Insert													
Envelopes	#10 Outgoing Window Envelope													

FORSYTH COUNTY DEPARTMENT FORMS														
Department	Form Description	Frequency	Estimated Volume	Form Type	Static Back	Ink	Perforated Coupon	Unique Scan Line, Static QR Code, 2d Square Bar Code	Mailing Envelope	Return Envelope	Selective Messages	Special Inserts	Mail Time	Proofs Req'd
Envelopes	#9 Return (No Window)													
Envelopes	#9 Return Color Coded (Window)													
Envelopes	#9 Return Color Coded (No Window)													
Board of Elections	National Change of Address (NCOA)	Twice a year (January and July)	5,000	8.5x5.5 postcard	Yes	(3) Blue, Red, & Black	No		None	None	Yes	None	3 Days	Yes
Board of Elections	Confirmation of Voter Registration	December; biennially (even-numbered years)	15,000	8.5x5.5 postcard	Yes	(3) Blue, Red, & Black	No		None	None	Yes	None	5 Days	Yes
Board of Elections	Voter Information Card	Typically Bi-weekly	500	4x5.5 postcard	Yes; w/static front	(3) Blue, Red, & Black	Yes		None	None	Yes	None	2 Days	Yes

Digital samples are available at

<ftp://ftp.co.forsyth.nc.us/TAX/TAX%20and%20BOE/SAMPLES/> Whenever envelopes or preprinted forms are to be used in the process, the County may elect to provide those items with no additional cost from the Supplier. In these cases, the County will be responsible for shipping the items to the Supplier. Minimum delivery times will be established on a case-by-case basis.

Envelope Information – For Billing, the Tax Administration is using a single outgoing #10 envelope. The recipient's name and address show through the window. The Tax Department's return address is pre-printed in the upper left-hand corner. A #9 return envelope is inserted into the #10 outgoing envelope. The address to the lockbox facility is printed on the remittance and is displayed through a window on the lower right face of the envelope. The address barcode for the lockbox must appear on the form and must be visible to the Post Office scanning equipment. The logo is printed in black.

The following information is printed on the reverse of all billing envelopes:

Please...

- 1. Sign your check.**
- 2. Do not enclose cash.**
- 3. Write your account number on your check.**
- 4. Send only the remittance portion of the statement.**
- 5. Do not fold, staple, or tape payment to remittance.**
- 6. If you have a change of address, show new address on remittance before sealing.**

For all other mail, the County is using a single outgoing #10 envelope. The recipient's name and address show through the window. The Tax Department's return address is pre-printed in the upper left-hand corner. A #9 return envelope is inserted into the #10 outgoing envelope. The address is printed on the envelope. The address barcode must appear on the form and must be visible to the Post Office scanning equipment. The logo is printed in black.

The Annual Tax bills and Delinquent Notices share a common back.

All tax bills and delinquent notices contain a perforation.

Sample forms and envelopes may be requested by Forsyth County Tax Administration. The items can be provided in an electronic format or on paper. Most forms are printed on 24 lb paper stock.

The county uses multiple barcodes and barcode formats for identification of scanned documents. All forms will require a unique identification number along with a routing code. These codes must be tested and approved on an original document before printing. Documents that are returned to the County for scanning (ie. Abstracts and Appeal Forms) are normally printed on 70 lb Offset stock.

County may require the Proposer to provide samples during the evaluation process. If requested, the samples must be provided within 72 hours of the request.

Items indicating "No Sample" in the list above will require the design and development of a new form if used.

Additional Envelope Information (Tax Only) – The County attempts to standardize as many of its processes as possible. The Tax Administration has two addresses that are used for ordinary business. Unless otherwise stated, all outgoing mail uses a standard #10 window envelope with one of these addresses:

1. COLLECTIONS
FORSYTH COUNTY TAX COLLECTOR
PO BOX 82
WINSTON-SALEM, NC 27102-0082
2. ASSESSMENT
FORSYTH COUNTY TAX ADMINISTRATION
PO BOX 757
WINSTON-SALEM, NC 27102-0757

Unless otherwise stated, all return envelopes are #9 envelopes with our return address printed on the face. Return addresses are not printed on the face of the envelope and no window is provided for the return address.

The Supplier will group all like addresses, per County instruction, and mail in a single envelope. It is the Supplier's responsibility to determine the size and type of envelope and return.

Card Information – For NCOA and Confirmation cards, the Board of Elections uses an 8.5x5.5postcard, with blue and red static print on the back, black print for variable information on the front, 2-up cards on 8.5 x 11 stock, folded, and perforated two ways. These cards will also require pressure sealing for the folded cards. The Voter Information cards are 4 x 5.5 postcards, with blue and red static print on the front and back, black print for variable information on the front, 4-up cards on 8.5 x 11 stock, tabbed, and perforated two ways.

Sample forms and envelopes may be requested by Board of Elections. The items can be provided in an electronic format or on paper. Most forms are printed on 24 lb paper stock.

County may require the Proposer to provide samples during the evaluation process. If requested, the samples must be provided within 72 hours of the request.

Technical Requirements

The requirements defined in this section are **mandatory**. They contain the overall, general services required of the Supplier. The Supplier shall work with the County to coordinate the best possible method of printing and distributing notices. This process shall take into consideration the best possible process flow to ensure that the notices are validated, printed and mailed within an agreed upon time. The overall solution presented below defines a process in which notices are available for printing by the Awarded Supplier.

Information requested of the Awarded Supplier in this section shall be included in the appropriate subsection of the response format as described in 12. Proposal Response Format.

Contract Warranty: The Awarded Supplier warrants that all items furnished and all services performed by the Supplier, its agents and subcontractors shall be free and clear of any defects in workmanship or materials. Unless otherwise stated in the Contract, all items are warranted for a period of one year following delivery from the supplier and acceptance by the County. The supplier shall repair, replace or otherwise correct any problem with the delivered items. When an item(s) is replaced, it shall be replaced with an item of equivalent or superior quality without any additional costs to the County.

Contract Ownership Rights: The County shall have unrestricted authority to reproduce, distribute and use any submitted report, data or material and any software or modifications and any associated documentation that is designed or developed and delivered to the County as part of the performance of the contract.

3) Document Printing and Mailing Services

a. Document Design

The County desires to contract with a Supplier who possesses the staffing and technical expertise necessary to assure professional setup and design assistance with form layouts created and provided by the County. Such designs may include scan lines for remittance processing and barcodes for returned processing and archival. The County's business may require occasional rapid changes to the information on and the formatting of notices. In its response, the Awarded Supplier will describe the tools it has to facilitate this particular process. All designs provided to the Supplier by the County will remain property of the County; and, will not be presented for review or offered for use to customers of the Awarded Supplier without written consent of Forsyth County.

b. Data Management

The County desires to contract with a Supplier who has demonstrated expertise in working with various file formats to produce the County notices. The Awarded Supplier must be able to receive files through various transmission methods, and be available and capable of immediate processing of such files for production. It is the County's intent to regularly transmit production files in a predetermined form and format, however, occasionally the Awarded Supplier may be required to make programming calculations to create remittance processing scan lines and perform pre-issuance testing, or to code files with special messages to customers.

c. Forms

The County and the Awarded Supplier will review the cost of all pre-printed forms, envelopes, cards, and inserts based on the County's printing and inserting specifications. Delivery of these items will be determined by the lowest cost to produce and ship the items from the County's print shop, third party printers or the Supplier.

d. Minimum Requirements Unless Otherwise Specified and Approved

The majority of County forms will be 8 ½ x 11, simplex, with two color graphic capabilities, variable information, and specialized messages. All documents with a tear off coupon shall require a minimum paperweight of 24 lbs. Laser print with a combination of OCR Ink and Drop

Out Ink is required on all tear off coupons. Coupon layouts shall conform to all scanning and OCR specifications. The cards for Board of Elections will either be 8 ½ x 5 ½ or 4 x 5 ½, duplex, with three color graphic capabilities, variable information, and specialized messages. See **General Description of Current County Print Environment** for notice description and volume, as well as, requirements for custom mailing and return envelopes.

The Awarded Supplier shall provide the ability to insert materials with the notice envelopes. The Awarded Supplier will assist the County in determining the weight of the statements should the number of inserts within the month near the postal criteria for weight.

e. Selective Ability to Pull Statements

The County requires the ability to selectively pull notices and cards after transmission, but prior to printing and/or after printing but prior to mailing. Requests for printed notices and cards should not be mailed but returned to the County by the next business day. Selective pulls may be based on account number, zip code, types of accounts, districts, precincts, etc. Printed notices and cards determined to be incomplete for mailing, will be returned to County by overnight mail.

f. Combining Multiple Billings (Tax Only)

The Awarded Supplier shall have the capability to mail multiple notices, each consisting of one or more page, within the same envelope or flat pack. The Awarded Supplier shall work with the County in order to define the process required for identifying notices that will be placed into one envelope or flat pack. Multiple mailings may require alternative handling for selective inserts.

g. Batch Size

Because County processes are cyclical, many notices and cards are mailed in a large batch for the initial mailing with smaller batches that follow. The Supplier shall develop a single methodology to handle both types of mailings. The Supplier should include the cost to process supplemental mailings that may contain **500 or more documents, 499 to 100 documents** and less **than 100 documents**.

4) Schedule Timeframes for Proof Approval, Changes, and Production

Forsyth County's intent is to contract with a Supplier that can handle complete printing and mailing production within three (3) business days for large jobs (greater than 35,000 documents); and, within one (1) business day for smaller jobs (less than 35,000 documents) after the proof has been approved and provided by the County. Notices for proof approval are to be delivered to the County within one (1) business day from transmission of the file. The County's requests for changes to the information and/or the formatting of notices will be completed and new proofs provided to the County within one (1) business day.

Notice proofs that are required prior to production will vary based on the notice type. The County will provide a set of criteria for each notice type for the Awarded Supplier to use in extracting proof forms.

The County uses barcodes for identification of scanned documents. All forms will require a unique identification number along with a routing code. These codes must be tested and approved on an original document before printing.

5) Other Services

The County requires pdf copies of all printed documents on a secure FTP, or a USB thumb drive to be delivered to the County by certified mail. The Supplier must provide electronic copies of all documents printed, please provide information and pricing as an option. If you provide return mail-processing services such as opening and scanning of documents, please provide information and pricing as an option.

6) Security Requirements

The Awarded Supplier shall define and demonstrate security procedures that are in place. Copies of security certificates such as ISO certification should be included as part of the proposal. The County requires that security measures be taken, both physical security and network security, in that the County's statements and documents are made available only to the Awarded Supplier and parties that are approved by the County. The Awarded Supplier will provide a complete list of all third party Suppliers to be used in the process for approval by the County. The Awarded Supplier shall demonstrate and document that these security measures are in place and implemented.

7) Disaster Recovery Procedures

The Awarded Supplier shall have a demonstrated Disaster Recovery Program (hardware and software) and address their disaster recovery procedure that assures proper turn-around in their proposal. The detail of this plan should include off-site storage of information, data recovery procedures, equipment failure process, alternate FTP sites, etc. Additionally, the Awarded Supplier will detail their solution to assure that no significant interruption of service occurs, timing in which backup will occur, and the cost if any, that will be charged to the County for the availability of these services.

8) Postal Requirements

The Awarded Supplier shall be responsible for all sorting, applying of postage, coordination, required preparation and same business day delivery of the County's notices to the U.S. Post Office. The Awarded Supplier should guarantee that the processing performed provides the best possible postal rates available, regardless of file volume, and the Awarded Supplier shall take advantage of all future postage discounts made available by the U.S. Post Office. The Awarded Supplier shall outline their ability and/or procedure(s) for the following:

- a. The Awarded Supplier shall be U.S.P.S. NCOA link licensed and process files through NCOA prior to printing and mailing. The County will receive an electronic file of updates made through the NCOA Process prior to mailing of notices. If the Awarded Supplier uses additional in-house software to verify notice address, the County will receive files of changes made from the additional process prior to mailing of notices.
- b. The County may choose to substitute the following Other Mail Services: The Tax Administration is currently working with Peachtree Data to provide NCOA and ACS services to the addresses located in our database. Updates are performed semi-annually before the preparation of listings and the preparation of annual bills. If this service is provided by the Supplier, the cost must be equal to or lower than those cost provided by Peachtree Data and Updates must be returned to the County in a format that allows the

County to update the address information on their databases prior to the mailing of any notices. Contact the Forsyth County Tax Administration for additional information.

- c. The County requires that the mailing postmark display the postmark from the U.S.P.S. processing center closest to Forsyth County. At the current time, this is Greensboro, N.C. In the event that this center is closed or relocated, the County will have the right to designate the new center. The Awarded Supplier will state in advance, the specific location and description of the Bulk Mail Center(s) and their locations in which they intend to utilize as the primary mail drop off point for the County's notices and cards. In addition, the Awarded Supplier will designate an alternative facility to utilize if necessary and must list that location and address.
 1. The Awarded Supplier will notify the County on the same business day when mail exceeds the postal weight requirements, and provide the estimated postal charges to be incurred when mailing.
 2. Provide Forsyth County 24x7 access to the U.S. Postal Service 3600 series manifest reports and pre-sort reports for each mailing, preferably in a web-based environment.

9) Reporting Requirements

The Awarded Supplier will provide to the County an electronic file containing the data identifying those customers with suspected incorrect addresses. This report will be provided to the County in an acceptable electronic format to facilitate the updating of the County's customer address file in NCPTS and SEIMS. The file must be available at the time of or prior to the delivery of the documents to the addressee.

In addition, the Awarded Supplier must provide reporting for the number of notices printed (separately identified by form type), number of different inserts selected, and validation totals after each mailing.

10) Process Control And Visibility

In order to assure the validity of the notice and card production process, the Awarded Supplier will need to define an acceptable process that works within a daily timeframe to print and mail notices and cards. Visibility and control points within this process will be required to ensure that the notices mailed equate to the information sent. These control points and process visibility will be preferably web based and available to the County via the Internet. The tracking program should not require special software or hardware by the County.

Examples of the availability of the program will be:

1. Ability to transmit files electronically for processing
2. Capability to schedule, initiate, and view status of jobs
3. Number of notices and cards printed
4. US Postal Amounts for notice and card run
5. Number of pieces pulled in notice and card run
6. Confirmation of notices and cards sent to post office

11) Process Automation

In their response, the Awarded Supplier should describe any/all services it provides that can assist the County in increasing their efficiency of notice and card production and/or customer service issues. If the Awarded Supplier has capability of electronic/digital bill presentment and payment solutions, which may enhance Forsyth County's operations, information and cost estimates for such related services, they should provide for our consideration. The Awarded Supplier shall have a Chargeback System to invoice each Department within the County using the Awarded Supplier's services.

12) Proposal Response Format

In order to facilitate the analysis of responses to this RFP, Suppliers are required to prepare their proposals in accordance with the instructions outlined in this section. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the Supplier's capabilities to satisfy the requirements of the RFP. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All pages in your response should be numbered and organized in the following major sections:

<u>Section</u>	<u>Title</u>
12	Executive Summary
13	Proposed Services to be Provided (With each section identified separately by Department)
14	Technology Solutions (With each section identified separately by Department)
15	County References
16	Detailed Cost Quotation (Utilizing format provided)

NOTE: Instructions relative to each part of the response to the RFP are defined in the remainder of this section.

13) Executive Summary

This section of the response to the RFP should be limited to a brief narrative highlighting the Supplier's proposal. Within this section, the Supplier should highlight briefly their abilities and inabilities upon the requirements requested.

14) Proposed Services to be Provided

The Supplier shall present, in detail, features and capabilities of their proposed services to be provided. The Supplier should state what implementation services will be provided, processes, control points and time frames for the on-going services. In addition, please describe all services that their company performs. If other ancillary services are available that may be deemed pertinent to the process, please describe in detail.

15) Supplier's Technology Solution

The Supplier shall provide narrative responses to each of the requirements listed:

1. Data Transmission Requirements

2. Quality Assurance Requirements
3. Quality Assurance Procedures
4. Process Visibility Tools
5. Production Management & Controls
6. Equipment/Software Capabilities – This should include information about the age of equipment by category, capacity, and the replacement history. For software, the narrative should describe the types of software available, whether the software is developed internally or through a third-party Supplier. The narrative should also include a history of upgrades and enhancements of the software
7. Business Continuity Plan

16) County References

FORSYTH COUNTY, NORTH CAROLINA

Request for Printing, Inserting, and Mailing SUPPLIER QUALIFICATIONS

Information about the Supplier

1. Firm Name _____
2. Legal Name (if different) _____
3. Years in Business _____
4. Number of years providing services *similar* to this proposal _____
5. Contact Person _____
6. Full Mailing Address _____
7. Telephone Number _____
8. Fax Number _____
9. Email address of contact person _____
10. Name and phone number of Bonding company _____
11. Number of full time employees _____
12. Names, titles, roles, experience and qualifications certifications of personnel who would work on this project
(attach brief experience listing for each, focusing on similar projects):

13. Name and resume of proposed point of contact for this project :

14. Suppliers shall provide at least **three** government references that are similar in size and complexity of the County that have an open contract for printing and mailing services.

Reference:

1. Organization Name: _____
2. Address: _____

3. Type of Business: _____
4. Contact Person: _____
5. Do you have experience working with Tax & Board of Elections combined for other North Carolina counties?

6. Telephone and Fax numbers: _____
7. Secondary Contact Person: _____
8. Telephone and Fax numbers: _____
9. Length and Dates of Consulting Services: _____
10. Description of Services (including number of pieces printed and mailed, and type of mailing being performed):

17) General Information and Guidelines

Electronic copies of this Request for Proposal (RFP) are available on the Forsyth website address <ftp://ftp.co.forsyth.nc.us/TAX/TAX%20and%20BOE/>.

18) Supplier Evaluation and Selection

a. Evaluation Method

All Proposals that meet the specifications of this RFP will be evaluated in accordance with the criteria listed below:

b. Awarding Authority/Evaluation Committee

This RFP is issued by the Forsyth County Purchasing Department on behalf of Forsyth County.

An evaluation committee will have responsibility for reviewing and evaluating all Proposals submitted in response to this RFP. The County reserves the right to include outside consultants to assist in the evaluation process.

AWARD: It is the intent of Forsyth County to make a single award of all item(s) listed in this RFP. Forsyth County reserves the right to award by line item whichever is in the best interest of Forsyth County

c. Selection of Qualified Proposals

The selected evaluation committee will review the Proposals submitted by all Suppliers to determine whether the minimum qualifications set forth are met. On the basis of the evaluation criteria set forth in the RFP, the evaluation committee will evaluate and make a recommendation of the most qualified Proposal for Award by the Purchasing Director.

The evaluation committee shall, in addition to references supplied, request additional information about a company and its experience with previous contracts.

The County may use sources of information not supplied by the Supplier concerning the ability of the Supplier to perform the work. However, Forsyth County is under no obligation to obtain any additional information other than that supplied by the Supplier in response to this RFP.

d. Selection Criteria

The Supplier's written response and Supplier supplied documentation will constitute the primary basis for assessing the merits of a Supplier's offer. The basis for the evaluation of proposals received is included, but not limited to, the following considerations:

1. Supplier's performance record in meeting the requirements of their existing customers.
2. Number of satisfied county government customers in the State of North Carolina using the consulting services for a similar request.
3. Adherence to the requested proposal format. This includes the thoroughness of the proposal, as well as, the format of the presentation.
4. The ability for the user to meet time and production requirements.
5. Listing of competitive prices for all applied notices and cards.
6. The number, type and experience of Supplier staff.
7. The level of the Supplier's technology and history of upgrades and enhancements of staff.

Forsyth County reserves the right to reject any and all Proposals, as deemed in the best interest of the County.

19) Procurement Timetable

The timetable for the RFP process is summarized below. Note that these are target dates and are subject to change by the County.

Activity	Target Date
Advertisement Date	April 23, 2020
Pre-Proposal Teleconference	May 1, 2020
Submission of Questions by Suppliers Closes	May 7, 2020
Answers to Vendors	May 8, 2020
RFP Due Date and Time	12:00 Noon, May 14, 2020
RFP Evaluation	
Agenda Item for Review	June 12, 2020
Briefing Dates / Commission Award	June 18 / July 2
Supplier Award Notification	
Contract Finalized	
Go-Live Date	

20) SERVICES COST CERTIFICATION – SUPPLIER:

This proposal is in accordance with the specifications provided by the County. This proposal is submitted subject to the terms and conditions contained in this contract packet and further subject to any and all applicable provisions of North Carolina law or code. I hereby certify that I have read all items of the RFP and fully understand the requirements listed herein. I further certify that I am an authorized agent of the Offering Firm and may be held liable for any and all remedies that may become due to the Forsyth County.

IF AN INDIVIDUAL, SIGN BELOW:

NAME OF FIRM	ADDRESS	COUNTY, STATE	ZIP CODE	
SIGNATURE	PRINTED NAME	TITLE	DATE	

IF A PARTNERSHIP, SIGN BELOW:

NAME OF FIRM	ADDRESS	COUNTY, STATE	ZIP CODE	
SIGNATURE	PRINTED NAME	TITLE	DATE	

IF A CORPORATION, SIGN BELOW:

NAME OF CORPORATION	ADDRESS	COUNTY, STATE	ZIP CODE	
SIGNATURE OF OFFICER	PRINTED NAME	TITLE OF OFFICER	DATE	
ADDRESS	TITLE OF OFFICER SIGNING			

THE ABOVE-SIGNED INCORPORATED UNDER THE LAWS OF THE STATE OF: _____

Type or Print State of Incorporation