



CITY of NOVI CITY COUNCIL

Agenda Item E
February 9, 2015

SUBJECT: Approval of contract award for printing and mailing services for utility bills, tax bills, and assessment notices to Whitlock Business Systems for the estimated annual amount of \$19,540.

SUBMITTING DEPARTMENT: Treasury/Assessing

CITY MANAGER APPROVAL: 

EXPENDITURE REQUIRED	\$ 19,540
AMOUNT BUDGETED	\$ 12,300
	\$ 39,210
	\$ 10,000
APPROPRIATION REQUIRED	N/A
LINE ITEM NUMBER	592-592.00-740.592 (\$ 6,800)
	592-592.00-900.000 (\$ 5,500)
	101-253.00-740.300 (\$ 39,210)
	101-209.00-740.209 (\$ 10,000)

BACKGROUND INFORMATION:

A Request for Proposal (RFP) was posted on the Michigan Intergovernmental Trade Network (MITN) website. Email notices were sent to 144 companies registered for printing and mailing services. In response, we received seven proposals. A Qualifications Based Selection (QBS) review was completed by a team of Treasury, Assessing and Water and Sewer staff. Firms were rated based on each firm's capacity to perform the work, qualifications and experience, comparable projects and ability to meet timelines. The RFP required fee proposals to be submitted separately. Based on the QBS ratings, the fee proposals of the top four were opened following the rating process (see highlighted scores below).

QBS Evaluation Group Totals							
Company Name	A.B. Data	Extend Your Reach	Great Lakes Graphics	NPC Inc.	NWC	Questmark Information Systems	Whitlock Business Systems
Total	1585	1165	1300	1205	1630	1760	2555

Fee Proposals of Top QBS Rated Firms				
Printing & Mailing Services	Whitlock Business Systems	Questmark Information Systems	NWC	A.B. Data
QBS Ranking	1	2	3	4
Part A – Utility Bills	\$ 9,860	\$ 7,877	\$ 10,037	\$ 10,676
Part B – Tax Bills	\$ 7,700	\$ 6,000	\$ 6,490	\$ 5,272
Part C – Assessment Notices	\$ 1,980	\$ 2,106	\$ 2,632	\$ 1,636
Total Annual	\$19,540	\$ 15,983	\$ 19,159	\$ 17,584
Additional One-Time Set Up Fee	\$ 0	\$ 300	\$ 300	\$ 856
Total Annual, including Set Up Fee	\$ 19,540	\$ 16,283	\$ 19,459	\$ 18,440

Whitlock ranked highest in the QBS evaluation process and is the current supplier of this service to the City. They have provided excellent service to date and we have been pleased with their performance levels, responsiveness and programming expertise, in addition to the quality and timely delivery of their printing products. Staff is recommending the award of this contract to Whitlock Business Systems for a one year agreement with two one-year renewal options, at the same contract pricing, terms and conditions.

RECOMMENDED ACTION: Approval of contract award for printing and mailing services for utility bills, tax bills, and assessment notices to Whitlock Business Systems for the estimated annual amount of \$19,540.

	1	2	Y	N
Mayor Gatt				
Mayor Pro Tem Staudt				
Council Member Casey				
Council Member Markham				

	1	2	Y	N
Council Member Mutch				
Council Member Poupard				
Council Member Wrobel				



**NOTICE - CITY OF NOVI
REQUEST FOR PROPOSALS**

**PRINTING & MAILING SERVICES
FOR UTILITY BILLS, TAX BILLS, AND ASSESSMENT NOTICES**

The City of Novi will receive sealed proposals for PRINTING & MAILING SERVICES FOR UTILITY BILLS, TAX BILLS, AND ASSESSMENT NOTICES according to the specifications of the City of Novi.

Sealed proposals, with fee proposals submitted in a separate sealed envelope, will be received until **11:00 A.M.** prevailing Eastern Time, **Thursday, November 13, 2014**. Fee proposals will not be opened at this time. Proposals shall be addressed as follows and delivered to:

**CITY OF NOVI
CITY CLERK'S OFFICE**
45175 Ten Mile Rd.
Novi, MI 48375-3024

OUTSIDE OF MAILING ENVELOPE MUST BE PLAINLY MARKED "RFP PRINTING & MAILING SERVICES" AND MUST BEAR THE NAME OF THE PROPOSER.

The City reserves the right to accept any or all alternative proposals and award a contract to other than the lowest proposer, to waive any irregularities or informalities or both; to reject any or all proposals; to subdivide the award, and in general to make the award of the contract in any manner deemed by the City, in its sole discretion, to be in the best interest of the City of Novi.

Sue Morianti
Purchasing Manager

Notice Dated: October 23, 2014

NOTICE TO PROPOSERS:

The City of Novi officially distributes RFP documents through the Michigan Intergovernmental Trade Network (MITN). **Copies of proposal documents obtained from any other source are not considered official copies.** The City of Novi cannot guarantee the accuracy of any information not obtained from the MITN website and is not responsible for any errors contained by any information received from alternate sources. Only those vendors who obtain RFP documents from the MITN system are guaranteed access to receive addendum information, if such information is issued. If you obtained this document from a source other than the source indicated, it is recommended that you register on the MITN site, www.mitn.info and obtain an official copy.



**CITY OF NOVI
REQUEST FOR PROPOSALS**

**PRINTING & MAILING SERVICES
FOR UTILITY BILLS, TAX BILLS, AND ASSESSMENT NOTICES**

INSTRUCTIONS TO PROPOSERS

This RFP is issued by the Purchasing Office of the City of Novi.

IMPORTANT DATES

RFP Issue Date	October 23, 2014
Last Date for Questions	Wednesday, November 5, 2014 by 12:00 p.m. ET Please submit all questions via email to: Sue Morianti, Purchasing Manager smorianti@cityofnovi.org
Response Due Date	Thursday, November 13, 2014 by 11:00 A.M.

PROPOSAL SUBMITTALS

Provide **five (5)** copies of your proposal, **one (1)** unbound copy signed in ink and clearly marked as ORIGINAL, and **four (4)** copies of the original proposal, clearly marked as COPY. ***Fee proposal (one copy, signed in ink) must be sealed in a separate envelope and may be included in same mailing envelope as your technical proposal.*** Do not include any fees in your technical proposal. Original proposal may be clipped but should not be stapled or bound. Copies may be stapled and bound. The original and copies should be identical, excluding the obvious difference in labeling. No other distribution of the proposal will be made by the Contractor. Proposal must be signed by an official authorized to bind the Contractor to its provisions.

FAILURE TO SUBMIT PRICING ON THE PROPOSAL FORM PROVIDED BY THE CITY OF NOVI MAY CAUSE THE PROPOSAL TO BE CONSIDERED NON-RESPONSIVE AND INELIGIBLE FOR AWARD.

CHANGES TO THE PROPOSAL/ADDENDUM

Should any prospective Proposer be in doubt as to the true meaning of any portion of the RFP, or should the Proposer find any patent ambiguity, inconsistency, or omission therein, the Proposer shall make a written request (via email) for official interpretation or correction. Such request shall be submitted to the staff member indicated above. The individual making the request shall be held responsible for its prompt delivery.

Such interpretation or correction, as well as any additional RFP provisions that the City may decide to include, will be made as an addendum, which will be posted on the MITN website at www.mitn.info. Any addendum issued by the City shall become part of the RFP and subsequent contract and shall be taken into account by each proposer

in preparing its proposal. Only written addenda is binding. It is the Proposer's responsibility to be sure they have obtained all addenda. Receipt of all addenda must be acknowledged on proposal form.

SUBMISSION OF PROPOSAL

Proposals must be submitted in a sealed envelope. You may submit your sealed fee proposal in the same package as your technical proposal. **Outside of mailing envelope must be labeled with name of contractor and clearly labeled with the name of the RFP.** Failure to do so may result in a premature opening or failure to open such proposal.

To be considered, sealed proposals must arrive at City Clerks Office, on or before the specified time and date. There will be no exceptions to this requirement. Proposal is considered received when in the possession of the City Clerk. Contractors mailing proposals should allow ample time to ensure the timely delivery of their proposal. Proposals received after the closing date and time will not be accepted or considered. Faxed, emailed, or telephone proposals are not acceptable. The City of Novi shall not be held responsible for lost or misdirected proposals. The City reserves the right to postpone a RFP opening for its own convenience.

Proposals must be clearly prepared and legible and must be signed by an Authorized Representative of the submitting Company on the enclosed form. Proposals must show unit and total prices if requested. In case of mistakes in price extension, *unit pricing shall govern*. ANY CHANGES MADE ON PROPOSAL FORMS MUST BE INITIALED OR YOUR PROPOSAL MAY BE CONSIDERED NON-RESPONSIVE.

A proposal may be withdrawn by giving written notice to the Purchasing Manager before the stated due date/closing time. After the stated closing time, the proposal may not be withdrawn or canceled for a period of One Hundred and Twenty (120) days from closing time.

Failure to include in the proposal all information requested may be cause for rejection of the proposal.

Proposers are expected to examine all specifications and instructions. Failure to do so will be at the proposer's risk.

USE OF THE CITY LOGO IN YOUR PROPOSAL IS PROHIBITED.

No proposal will be accepted from, or contract awarded to any person, firm, or corporation that is in arrears or is in default to the City Novi upon any debt or contract, or that is in default as surety or otherwise, or failed to perform faithfully any previous contract with the City.

EXCEPTIONS

The City will not accept changes or exceptions to the RFP documents/specifications unless Contractor indicates the change or exception in the "Exceptions" section of the proposal form. If Contractor neglects to make the notation on the proposal form but writes it somewhere else within the RFP documents and is awarded the contract, the

change or exception will not be included as part of the contract. The original terms, conditions and specifications of the RFP documents will be applicable during the term of the contract.

RESPONSIVE PROPOSALS

All pages and the information requested herein shall be furnished completely in compliance with instructions. The manner and format of submission is essential to permit prompt evaluation of all proposals on a fair and uniform basis. Unit prices shall be submitted if space is provided on proposal form. In cases of mistakes in extension, the unit price shall govern. Accordingly, the City reserves the right to declare as non-responsive, and reject an incomplete proposal if material information requested is not furnished, or where indirect or incomplete answers or information is not provided. Any exceptions to the specifications must be noted on the proposal form.

SELECTION PROCESS

This document is a Request for Proposals. It differs from an Invitation to Bid in that the City is seeking a solution as described herein, and not a bid meeting firm specifications for the lowest price. As such the lowest price will not guarantee an award recommendation. Competitive sealed proposals will be evaluated based on criteria formulated around the most important features of the service, of which qualifications, experience, capacity and methodology, may be overriding factors, and price may not be determinative in the issuance of a contract or award. The proposal evaluation criteria should be viewed as standards that measure how well a contractor's approach meets the desired requirements of the city. Those criteria that will be used and considered in evaluation for award are set forth in this document. The City will thoroughly review all proposals received. A contract will be awarded to a qualified contractor submitting the best proposal.

PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated using the following criteria:

1. Capacity to perform the work; resources, equipment, staff, current workload
2. Evaluation of firm, qualifications, & experience
3. Comparable projects; references
4. Description of work plan & timelines
5. Cost Proposal

CONTRACT PERIOD

The contract period will be for one (1) year. Upon mutual consent of the City of Novi and the successful proposer, the contract may be renewed two (2) times in one (1) year increments at the same terms and conditions of the original contract.

CONTRACT AWARD

The City reserves the right to accept any or all alternative proposals and award a contract to other than the lowest proposer, to waive any irregularities or informalities or both; to reject any or all proposals; to subdivide the award, and in general to make the award of the contract in any manner deemed by the City, in its sole discretion, to be in the best interest of the City of Novi.

The City may, from time to time, find it necessary to continue this contract on a month-to-month basis only, not to exceed a six (6) month period. Such month-to-month extended periods shall be by mutual agreement of both parties, with all provisions of the original contract or any extension thereof remaining in full force and effect.

ESTIMATED QUANTITIES

Quantities stated are estimated and will be used for award purposes only. The numbers stated are based on past experience, and will change as accounts are added & deleted.

INVENTORY

The contractor will store the inventory of blank paper stock & envelopes at no charge to the City. At the conclusion of the contract, Contractor will ship, at no charge to the City of Novi, any un-used paper stock or envelopes to a location specified by the City of Novi.

DOWN PAYMENTS OR PRE-PAYMENTS

Any proposal received which requires a down-payment or pre-payment for services prior to work completion & acceptance will not be considered for award.

POSTAGE

The successful proposer is responsible for payment of postage. The City will reimburse the successful proposer for the actual cost of first class postage.

CONTRACT TERMINATION

The City may terminate and/or cancel this contract (or any part thereof) at any time during the term, any renewal, or any extension of this contract, upon thirty days (30) days written notice to the Contractor, for any reason, including convenience without incurring obligation or penalty of any kind. The effective date for termination or cancellation shall be clearly stated in the written notice.

The Contractor may terminate this contract by giving a minimum thirty (30) days written notice. The effective date for termination or cancellation shall be clearly stated in the written notice. If the contractor terminates the contract early or otherwise fails to fulfill the contract during the contract term, Contractor will be barred from doing business with the City of Novi for a minimum of three (3) years.

TAX EXEMPTION

It is understood that the City of Novi is a governmental unit, and as such, is exempt from the payment of all Michigan State Sales and Federal Excise taxes. Do not include such taxes in the proposal prices. The City will furnish the successful proposer with tax exemption certificates when requested. The City's tax-exempt number is 38-6032551.

TRANSFER OF CONTRACT/SUBCONTRACTING

The successful proposer will be prohibited from assigning, transferring, converting or otherwise disposing of the contract agreement to any other person, company or corporation without the expressed written consent of the City of Novi.

DISCLOSURE

All documents, specifications, and correspondence submitted to the City of Novi become the property of the City of Novi and are subject to disclosure under the provisions of Public Act No. 442 of 1976 known as the "Freedom of Information Act". This Act also provides for the complete disclosure of contracts and attachments hereto. This means that any informational material submitted as part of this RFP is available without redaction to any individual or organization upon request.

ECONOMY OF PREPARATION

Proposals should be prepared simply and economically, providing a straightforward and concise description of the proposer's ability to meet the requirements of the RFP. Emphasis should be on completeness and clarity of content. Included in the response must be a point by point response to the Requirements and other sections of the RFP. The City of Novi is not liable for any costs incurred by proposers prior to issuance of a contract.

NON-DISCRIMINATION

In the hiring of employees for the performance of work described in this RFQ and subsequent contract, neither the contractor, subcontractor, nor any person acting in their behalf shall by reason of religion, race, color, national origin, age, sex, height, weight, handicap, ancestry, place of birth, sexual preference or marital status discriminate against any person qualified to perform the work required in the execution of the contract.

INDEPENDENT PRICE DETERMINATION

By submission of a proposal, the offerer certifies, and in case of a joint proposal, each party hereto certifies as to its own organization, that in connection with the proposal:

- (a) The prices in the proposal have been arrived at independently without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other offerer or with any other Competitor; and
- (b) No attempt has been made or will be made by the offerer to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition.

Each person signing the proposal certifies that:

- (c) He is the person in the offerer's organization responsible within that organization for the decision as to prices being offered in the proposal and that he has not participated and will not participate in any action contrary to (a) and (b) above; or
- (d) He is not the person in the offerer's organization responsible within that organization for the decision as to prices being offered in the proposal but that he has been authorized in writing to act as agent for the persons responsible for such decisions in verifying that such persons have not participated, and will not participate, in any action contrary to (a) and (b) above, and that as their agent, does hereby so certify; and that he has not participated, and will not participate in any action contrary to (a) and (b) above.

A proposal will not be considered for award if the sense of the statements required in the proposal has been altered so as to delete or modify the above.



CITY OF NOVI

PRINTING & MAILING SERVICES FOR UTILITY BILLS, TAX BILLS, AND ASSESSMENT NOTICES

SPECIFICATIONS

The City of Novi is seeking proposals for printing, folding, inserting, and mailing services for water & sewer bills (monthly), tax bills (two times annually), and change of assessment notices (once annually).

PART A – UTILITY BILL PRINTING & MAILING SERVICES

The City generates approximately 14,000 bills quarterly. Approximately 1/3 of the City is billed each month.

SCOPE OF WORK

- Supply stock for bills, mailing envelopes, return envelopes
- Print form on paper stock, print data on forms, fold, insert into mailing envelope along with return envelope and as-needed inserts.
- Contractor will use Contractor's postage machine and postal permit. City will reimburse contractor for postage.
- Contractor will be required to CASS certify the utility customer address data provided and pre-sort the mailings in order to ensure delivery, and utilize first class bulk rate mailing at the best possible rates.
- Contractor will provide Move Update service monthly through the USPS. Most of the City's accounts are in the name of "Occupant". Move Update services will only be necessary on the accounts in the name of actual residents/owners.
- Contractor will deliver sorted bills to Post Office.
- Contractor must be able to process data from a BS&A.net export file.
- Data file for House Holding/Multiple Bill Mailings can be sent in a separate file
- City may require a recap report detailing the total number of bills processed along with a breakdown of the dollar amount by line item
- Contractor must be able and willing to meet with the City and their bank to ensure the bill is an acceptable format for lockbox processing and provide test bills.
- Additional consideration will be given to the Contractor that has offices and a principal location in the State of Michigan.

PROCESSING TIME

The successful proposer will process and deliver the bills monthly to the Post office no later than 3 days after the data is electronically submitted to the Contractor by the City of Novi.

SPECIFICATIONS

Water & Sewer Bills	8-1/2" x 11", 50# Offset White with Bottom Perforation. Printed one side, blue & black text, blue/gold logo
#10 Double Window Envelopes	24# white wove, indicia printed on front (with contractor's permit number), black ink. Please note size and placement of windows on sample attached.
#9 Regular Return Envelope	24# White wove, printed one side, black ink
As-needed inserts	8-1/2" x 11" or 8-1/2 x 5-1/2", 24# white or color paper, printed one side, black ink; 11"x17", 24# white, printed both sides, black ink, folded to 8-1/2" x 11" then folded to fit in mailing envelope

PART B - TAX BILLS

The City of Novi is seeking proposals for printing, folding, inserting, and mailing tax bills twice per year (June and November).

SCOPE OF WORK

- Print tax form. Provide the City with additional blank forms (approximately 550 blank forms annually).
- Print tax data on pre-printed form. Data can be provided as a BS&A .Net export file or as a PDF file.
- There are approximately 1200 bills for each tax season which will not be mailed. These will be batched by billing code at the beginning or end of the data file for ease of identification and the contractor will separate them from the bills to be mailed. These bills will not be folded or inserted in mailing envelopes. **If contractor is located within 20 miles of the City, the Assistant Treasurer will come to your site and pick up these bills after they are printed. If the contractor is located more than 20 miles from the City, please include a cost for shipping these bills to the City of Novi, Attention: Debra Peck, 45175 Ten Mile Road, Novi, MI 48375.**
- Print mailing envelopes & return envelopes with all required information for proper mailing. Stock envelopes will be stored at contractor's site at no additional charge.

- Print additional inserts when requested
- Fold & insert tax bill, return envelope, and any necessary inserts into mailing envelope
- Sort, bag, and properly process so the bills can be mailed. The City prefers that the same contractor provide the printing and mailing services.
- Contractor will be required to CASS certify the customer address data provided and pre-sort the mailings in order to ensure delivery, and utilize first class bulk rate mailing at the best possible rates.
- Contractor will deliver bills to U.S. Post Office.
- The City may request a recap report detailing the total number of bills processed as well as a breakdown of the dollar amount charged by line item.
- Contractor must be able and willing to meet with the City and their bank to ensure the bill is an acceptable format for lockbox processing and provide test bills.
- Additional consideration will be given to the Contractor that has offices and a principal location in the State of Michigan.
- Contractor must be able to process data from a BS&A.net export file.

SPECIFICATIONS

Tax Bill Forms	8-1/2" x 11" 24# MICR paper stock, perforated, printed 2 sides (3 colors on front, one color on back). The ink colors are different for each tax season.
#10 Single Window Envelope	24# White wove, printed on one side with City's return address and indicia printed, black ink.
#9 Regular Return Envelope	24# white wove, printed one side with Lockbox address, black ink
As-needed inserts	8-1/2" x 11", 24# bond, white or color paper, printed one side or two-sided, black ink

PROCESSING TIME

From date of receipt of the data file, Contractor will have 3 business days to deliver the bills to the Post Office.

PART C - CHANGE OF ASSESSMENT NOTICES (once per year in February)

SCOPE OF WORK

- Print 2-sided change of assessment notices. Notices for the front of the notice are provided as an 18,000 page PDF. Text to be printed on the back will be provided as a one (1) page PDF.
- Print mailing envelopes with all information that is required for proper mailing. Stock envelopes are to be stored at contractor's site at no additional charge.
- Print additional inserts when requested
- Fold & insert notice and any necessary insert(s) in mailing envelope.
- Sort, bag, and properly process notices for mailing. The City prefers that the same contractor provide the printing and mailing services.
- Contractor will be required to CASS certify the customer address data provided and pre-sort the mailings in order to ensure delivery, and utilize first class bulk rate mailing at the best possible rates
- Contractor will deliver notices to Post Office
- The City will request a recap report detailing the total number of notices processed as well as a breakdown of the dollar amount charged by line item.
- Prior to final printing, contractor will provide a 5-page sample to the Assessor for review and approval. The Assessor will review and approve within one (1) business day.

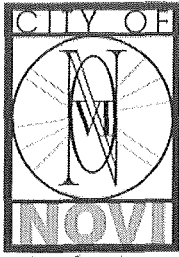
PROCESSING TIME

From date of receipt of the data file, Contractor will have 5-7 calendar days to deliver the notices to the Post Office. Due to statutory mailing requirements, the postmarks must be February 20th or before. The City will provide the PDF files to the contractor no later than February 13th.

SPECIFICATIONS

Change of Assessment Notices	70# offset white, printed two-sided, black ink
#10 Single Window Envelopes	24# White wove, printed one side, with logo/return address and indicia, black ink,
As-needed inserts	8-1/2" x 11", 24# white or color paper, printed one side or two-sided, black ink

ORIGINAL



cityofnovi.org

CITY OF NOVI

PRINTING & MAILING SERVICES FOR UTILITY BILLS, TAX BILLS, AND ASSESSMENT NOTICES

FEE PROPOSAL

The undersigned proposes to furnish all labor, materials, & equipment to provide printing & mailing services per the specifications attached.

PART A – UTILITY BILLING – ONCE PER MONTH

Description	Estimated Quantity (Annual)	Unit Price (Each)	Total Price
Provide & print water bill (50# offset white, bottom perforated) – offset printed with 3 colors, one side	56,000	\$.025	1400.00
Provide & print mailing envelopes (white 24# #10 double window) – print with indicia, one side, black ink	56,000	\$.031	1736.00
Provide & Print return envelopes (white 24# #9 regular) – print one side, black ink	56,000	\$.029	1624.00
Print data on pre-printed form - Print data on offset-printed blank paper stock, print front only, black ink	56,000	\$.03	1680.00
Mail Service – Fold, insert water bill and return envelope, sort & deliver to post office (do not include postage)	56,000	\$.047	2632.00
Move updates	50	\$ N/C	.00
House Holding/Multiple Bill Envelope – 9 X 12 envelope	5000	\$.15	750.00
House Holding /Multiple Bill Envelope -10 x 13 envelope	200	\$.19	38.00
TOTAL ANNUAL COST			\$9860.00

OTHER COSTS:

Description	Estimated Quantity	Unit Price (per thousand)	Total Price
Set-up - One Time account Set Up	1	waived	.00
Edit Charge - Hourly Rate for layout changes after City has given initial approval	1	30.00	30.00
Print & insert additional notice - Example: 8-1/2" x 11", 24# white or color paper, printed one side, black ink	14,000 annually	.040*	560.00
Print & insert additional notice - 8-1/2" x 5.5", 24# white or color paper, printed one side, black ink	14,000 annually	.020**	280.00
Print & insert additional notice - 11X17", 24# white or color, printed both sides, black ink, folded	14,000 annually	.17***	2380.00
Postage	56,000 annually		Actual cost will be reimbursed to contractor

ADDITIONAL CHARGES/FEEES FOR PART A:

(If any costs are not included in the tables above, you must list them here or on an additional attached sheet. No charges will be allowed if they are not disclosed in your proposal.)

* For colored stock, please add .01/each

** For colored stock, please add .005/each

*** For colored stock, please add .02/each

PROCESSING TIME (PART A)

- (X) The contractor can meet the delivery schedule as indicated in the proposal specifications.
- () The company cannot meet the delivery schedule as specified, but offers:

COMMENTS/EXCEPTIONS FOR PART A: (All exceptions to the specifications MUST be listed here).

PART B – TAX BILLS (TWO TIMES PER YEAR)

Item Description	Estimated Quantity (Annual)	Unit Price (Each)	Total Price
Provide & print mailing envelopes (#10 single window, 24# white, black ink)	40,000	.035	1400.00
Provide & print return envelopes (#9 regular, 24# white, black ink)	40,000	.03	1200.00
Provide & print tax bill forms (8-1/2" x 11", white, 24# MICR, perforated) three-color print on front, one color on back	40,000	.05	2000.00
Print data on tax bill forms – one side, black ink	40,000	.03	1200.00
Mail Service – Fold, insert notice and return envelope into mailing envelope, bag, sort, deliver to Post Office (do not include postage)	40,000	.047	1880.00
Cost of mailing the "Billing Coded" bills (estimated at 1200 per tax season) to the Assistant Treasurer if contractor is more than 20 miles from the City	2 times	10.00	20.00
TOTAL ANNUAL COST			\$ 7,700.00

OTHER COSTS:

Description	Estimated Quantity	Unit Price (Each)	Total Price
Set-Up One-time account set up	1	100.00	100.00
Edit Charge - Hourly Rate for layout changes after City has given initial approval	1	30.00	30.00
Print & insert additional notice - 8-1/2" x 11", 24# white, one sided, black ink	40,000 annually	.04	1600.00
Print & insert additional notice - 8-1/2" x 11", 24# color paper, one side, black ink	40,000 annually	.05	2000.00
Print & insert additional notice - 8-1/2" x 11", 24# color paper, two sides, black ink	40,000 annually	.075	3000.00
Postage	40,000 annually		Actual cost will be reimbursed to contractor

ADDITIONAL CHARGES/FEEES FOR PART B:

(If any costs are not included in the tables above, you must list them here or on an additional attached sheet. No charges will be allowed if they are not disclosed in your proposal.)

PROCESSING TIME

(X) The contractor can meet the delivery schedule as indicated in the proposal specifications.

() The company cannot meet the delivery schedule as specified, but offers:

COMMENTS/EXCEPTIONS FOR PART B: (All exceptions to the specifications MUST be listed here)

PART C - CHANGE OF ASSESSMENT NOTICES (ONCE PER YEAR)

Description	Estimated Quantity (Annual)	Unit Price (Each)	Total Price
Provide & print Change of Assessment Notices (8-1/2" x 11", 70# white offset, printed two sides, black ink)	18,000	\$.11	\$ 1980.00
Provide & print Mailing Envelopes (#10 single window, 24# white, printed one side, black ink)	18,000	\$ N/C	Included in above
Mailing Services- Fold, insert in mailing envelope, sort, deliver to Post Office (do not include postage)	18,000	\$	Included in above
TOTAL ANNUAL PRICE			\$ 1980.00

OTHER COSTS:

Description	Estimated Quantity	Unit Price (Each)	Total Price
Set-Up One-time account set up	1	\$	Included
Print & insert additional notice – 8-1/2" x 11", 24# white, printed one side, black ink	18,000 annually	.04	\$720.00
Print & insert additional notice – 8-1/2" x 11, 24# color paper, printed one side, black ink,	18,000 annually	.05	\$900.00
Print & insert additional notice – 8-1/2" x 11, color paper, printed two sides, black ink	18,000 annually	.075	\$1350.00
Postage	18,000 annually		Actual cost will be reimbursed to contractor

ADDITIONAL CHARGES/FEEES FOR PART C:

(If any costs are not included in the tables above, you must list them here or on an additional attached sheet. No charges will be allowed if they are not disclosed in your proposal.)

PROCESSING TIME

- (X) The contractor can meet the delivery schedule as indicated in the proposal specifications.
- () The company cannot meet the delivery schedule as specified, but offers:

COMMENTS/EXCEPTIONS TO PART C: (All exceptions to the specifications MUST be listed here)

We acknowledge receipt of the following addenda: #1
(Please list number, ie #1)

This proposal submitted by:

Company name Whitlock Business Systems

Address 275 E. 12 Mile Road

City State Zip Madison Heights, MI 48071

Telephone (248) 548-1040 Fax (248) 545-5989

Agent's name Margo Pickl

Agent's signature 

Date November 13, 2014

November 11, 2014

Ms. Sue Morianti
Purchasing Manager
City of Novi
45175 W. Ten Mile Road
Novi, MI 48375-3024

RE: Printing and Mailing Services for Utility Bills, Tax Bills and Assessment Change Notices

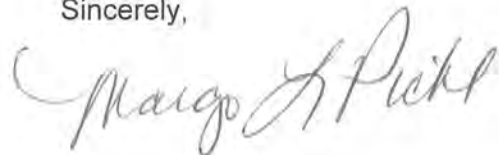
Dear Ms. Morianti,

Whitlock Business Systems is pleased to present our bid for the above mentioned projects. As the current vendor, we are well aware of the importance of accuracy, quality and timeliness of each of these projects and we hope the City of Novi continues to entrust Whitlock with this work.

Should you have any questions, please do not hesitate to contact me.

Thank you again for the opportunity bid on these projects. We look forward to your final decision.

Sincerely,



Margo L. Pickl
Sales Rep

ORIGINAL



cityofnovi.org

CITY OF NOVI

CONTRACTOR QUESTIONNAIRE

PRINTING & MAILING SERVICES FOR UTILITY BILLS, TAX BILLS, AND ASSESSMENT NOTICES

Failure to answer all questions could result in rejection of your proposal

Name of Firm Whitlock Business Systems

Address: 275 E. 12 Mile Road

City, State Zip Madison Heights, MI 48071

Telephone (248) 548-1040 Fax (248) 545-5989

Website www.wbsusa.com

1. Organizational structure: Corporation, Partnership, etc. Corporation
2. Firm established: 1982
3. Has your firm filed for Chapter 7 or Chapter 11 within the last ten (10) years?
No Yes Reason: _____
4. Under what other or former names has your organization operated?
360 Services International
5. How many full time employees? 46 Part time? 11
6. Is your firm able to process bills using data from the BS&A .Net program? Yes
7. Provide a list of customers who use the BS&A .Net programs for whom you have provided printing services City of Burton, City of Dearborn Heights, Northville Township, City of Southfield, Brownstown Township, City of Birmingham, City of Fraser, Grosse Pointe Farms, Grosse Pointe Park, City of Redford, Van Buren Township
8. Do you have a website for the City to upload the data documents? If not, how would the City provide the data to you? Yes
9. Are you able to provide a recap report detailing the total number of bills processed along with a breakdown of the dollar amount by line item? Yes
10. Location of facility where printing will be done: 275 E 12 Mile Rd,
Madison Heights, MI 48071
11. How many years has your company been providing Printing & Mailing Services?
Over 20 years

12. Do you intend to subcontract any part of this contract? Yes If so, what part and to whom? Envelope printing (Husky Envelope), offset printing (Stylecraft Printing)

13. How many clients does your company currently service with the type of services described? Tax Bills-13, Water Bills-5, Assessment Change Notices-30

14. Attach at least one sample document of a project completed similar in scope to the City of Novi. See attached

15. Provide information on personnel who will be assigned to the City of Novi project. Include a detailed communications contact list including phone numbers that shall identify, but is not limited to, account manager, program manager, inside sales contact, order processing, production control contact, accounts payable contact, and a backup contact, all of whom will be available to answer questions. You may attach an additional sheet, if necessary.

Account and Program Manager: Margo Pickl 248-548-1040 Ext 258
Inside Sales contact: Sandy Sherman 248-548-1040 Ext 261

Order Processing: Sandy Sherman 248-548-1040 Ext 261
Production Control: Jackie Bryant 248-548-1040 Ext 205

Accounts Payable: Lisa Kokotovich 248-548-1040 Ext 226

Backup Contact: Sam Yamin 248-548-1040 Ext 228

16. Provide a timeline detailing the initial set-up phase through City approval of the billing layout.

See Attached Print and Mailing Procedures document
Whitlock Business Systems is in the unique position, as the current
vendor, that set-up was completed at the inception of our
contract, so this step is complete.

17. Provide a timeline from receipt of data to customer receipt of bill/notice.

24 hour "window" for data processing

24 hour "window" for printing

24 hour "window" for folding, inserting and delivery to Post Office

Post Office normally delivers mail in metro Detroit area within 24 hours.

18. What backup plans are in place to ensure that if your printing location were to have a major printing problem, bills for the City would still be printed following the processing time indicated in this proposal?

See attached Whitlock Disaster Recovery Policy

19. What methods are in place to ensure that all utility customer data delivered to your firm by the City results in a printed bill?

Counts are confirmed with client. Counts must be matched by printer operator, folder operator, inserting operator and also mailing reports.

20. What Post Office will you deliver the bills to? Pontiac Metroplex

21. Are you able to accept payment via credit card? Yes If yes, please indicate type and amount of additional fees (if any) No additional fees

22. References: Provide at least three (3) client references for whom your company has performed similar work within the last three years. Note: You may include the City of Novi as a reference if the work was similar in nature to this work described in this RFP.

Company City of Novi

Address 45175 W. Ten Mile Road, Novi, MI 48375

Phone (248) 347-0444 Contact name Debra Peck

Company Brownstown Township

Address 21313 Telegraph Road

Phone (734) 675-2506 Contact name Cynthia Majlinger

Company City of Southfield

Address 26000 Evergreen Road

Phone (248) 796-5204 Contact name Kathy Hicks

23. Claims & Suits: Does your firm have any litigation pending or outstanding against your organization or its officers? If yes, please provide details.

No Yes

24. Provide any additional information you would like to include which may not be included within this Questionnaire. You may attach additional sheets.

THE FOREGOING QUESTIONNAIRE IS A TRUE STATEMENT OF FACTS:

Signature of Authorized Company Representative: Margo Pickl

Agent's Name (please print): Margo Pickl

Agent's Title: Sales Rep

Email Address: margo@wbsusa.com

Date: 11/11/2014

Whitlock Business Systems Print and Mailing Procedures

Our process begins by assigning a Customer Service Rep (CSR) to each new client. The CSR is a client's main contact for all production information, form changes, scheduling, etc. When we begin servicing a new client, the CSR will work with the client to create forms and acquire business rules for the client data. When a job is received, the CSR creates a job jacket listing all pertinent information. The information is also logged onto our electronic client journal. This journal is accessible to both the CSR, production personnel and the salesperson on the account. Any of these folks are able to update the journal with any pertinent information so that everyone working on the account is up-to-date on any changes. Each week all production personnel attend a mandatory meeting and review the all current and expected production, to be certain all departments are aware of current quantities and each department is on schedule to meet mailing deadlines.

Once proof samples are approved by our client, and we receive live files, the CSR will monitor the job flow beginning with our data processing department. This department processes client data through appropriate programs (CASS, NCOA and print programs) and creates files for printing, along with counts for each segment of the job and postal paperwork for pre-sorted mail. Data is processed through Smart Addresser software to verify addresses, add zip +4 and add carrier route postal bar coding to ensure the lowest First Class postal rates available. The job jacket containing all client approved samples, final counts, a prototype of the finished mail piece and other pertinent information, is transferred to our Laser Print Room. A laser print operator will run a few live samples of the production and give them to the CSR who will obtain a final approval from our client. Once we have signed client approval, the job will begin printing.

The laser print operator will sample the job every 500-1000 pages to ensure quality is maintained. In addition, as each group of output is removed from the laser printer, the operator does a final quality and quantity check before transporting the finished printing to our Distribution Department.

In our Distribution Department, the job is folded and inserted. Both the folder and inserter operators are required to match the prototype in the job jacket and to ensure the counts on both machines match the count from the Data Processing Department. If the job is metered (as opposed to using an envelope with an imprinted indicia), another count verification is done during this process.

The job then moves to our postal sorters who, using the postal paperwork as a guide, tray and tag the mail. The job, along with the appropriate postal forms, is then transferred to our shipping department where it is transported to the USPS Metroplex in Pontiac, Michigan.

Postal paperwork is available for client review or a copy of the paperwork can be sent with each invoice.

We have multiple digital laser printers, folders and inserting machines. This redundancy allows us to be our own back up for any machine malfunctions. In the rare occasion of a complete electrical failure at our facility, we also have Disaster Recovery procedures in effect.



printing ■ design ■ data ■ e-commerce ■ mailing ■ fulfillment

Whitlock Disaster Recovery Policy

This document describes the Whitlock Disaster Recovery program effective January 1, 2012.

Policy:

1. Overview

Whitlock Business Systems recognizes that Disaster Recovery is an integral part of our responsibilities to our clients to ensure the least amount of interruption should a natural or other disaster occur. Should a disaster, of any magnitude, occur, we have positioned ourselves with other industry leaders to safeguard against damaging disruptions in service to our customers.

2. Scope

Our internal system is capable of exchanging the following EDI: All print files, background forms and processing programs.

Our internal software and data files are backed up daily and an offsite running copy of all systems is maintained, using secure data transmission protocol.

Extensive backup up print and mail capabilities is maintained through reciprocal agreements with other securitized trade partners for printing and mailing documents, should the need arise.

Pay this tax to:
CHARTER TOWNSHIP OF REDFORD
LILY CAVANAGH, TREASURER
P.O. BOX 39401
REDFORD, MI 48239

2014 SUMMER TAX BILL

00999

See reverse side for important information

Parcel Number 79 036 02 0026 000
School District 82140 SOUTH REDFORD

Taxable Value 358,600		Assessed Value 358,600
PRE/MBT Value 0	% Declared PRE 0%	SEV Value 358,600

010*001*03201*****SCH 5-DIGIT
GRAHAM CLEMENTS MANAGEMENT, LLC
12125 DIXIE
REDFORD MI 48239-2464

Taxing Authority	Tax Rate	Tax Amount
STATE ED TAX	6.00000	2,151.60
RE95 SCH OPER	9.00000	3,227.40
RE95 SCH DEBT	4.65000	1,667.49
WC SPEC EDUC	3.36780	1,207.69
WC RESA	0.09650	34.60
COUNTY CHARTER	5.64830	2,025.48
LIBRARY DEBT	0.78800	282.57
RE95 SCH SINK FU	1.00000	358.60

Property Address 12125 DIXIE

Property Class: 301
REAL

29S26 27 LOTS 26 AND 27 LEHO INDUSTRIAL ACRES NO. 2 T1S R10E
L77 P77 WCR

Tax bill mailed to: GRAHAM CLEMENTS MANAGEMENT, LLC

	Fiscal Years
County:	12/01/2014 - 11/30/2015
Township:	04/01/2014 - 03/31/2015
School:	07/01/2014 - 06/30/2015
State:	10/01/2014 - 09/30/2015

Subtotal:	10,955.43
Administration Fee:	109.55
Total Tax Due	11,064.98
Add Penalties	
Adjusted total:	\$

KEEP THIS PORTION FOR YOUR INCOME TAX RECORDS

PLEASE RETURN THIS VOUCHER WITH YOUR PAYMENT
Make checks payable to: LILY CAVANAGH, TREASURER

Pay this tax to:
CHARTER TOWNSHIP OF REDFORD
LILY CAVANAGH, TREASURER
P.O. BOX 39401
REDFORD, MI 48239

Parcel Number 79 036 02 0026 000

2014 SUMMER TAX BILL

Property Address 12125 DIXIE

GRAHAM CLEMENTS MANAGEMENT, LLC
12125 DIXIE
REDFORD MI 48239-2464

Taxes payable 7/1/14 through 9/15/14 without interest and penalties.	
Total Tax Due	11,064.98
Add Penalties	
Adjusted total:	\$

79036020026000 0 0001106498

Pay this tax to:
CHARTER TOWNSHIP OF REDFORD
LILY CAVANAGH, TREASURER
P.O. BOX 39401
REDFORD, MI 48239

2014 SUMMER TAX BILL

00915

See reverse side for important information

Parcel Number 79 045 01 0309 000
School District 82140 SOUTH REDFORD

Taxable Value 23,469		Assessed Value 24,200
PRE/MBT Value 0	% Declared PRE 100%	SEV Value 24,200

001*001*00001*****SCH 5-DIGIT
 TYTSCHKOWSKI, WOLF P
 11400 WORMER
 REDFORD MI 48239-0907

Taxing Authority	Tax Rate	Tax Amount
STATE ED TAX	6.00000	140.81
RE95 SCH OPER	9.00000	EXEMPT
RE95 SCH DEBT	4.65000	109.13
WC SPEC EDUC	3.36780	79.03
WC RESA	0.09650	2.26
COUNTY CHARTER	5.64830	132.55
LIBRARY DEBT	0.78800	18.49
RE95 SCH SINK FU	1.00000	23.46

Property Address 11400 WORMER

Property Class: 401
 REAL

32A309 LOT 309 DUNNING PARK SUB T1S R10E L55 P27 WCR

Tax bill mailed to: BANK OF AMERICA

	Fiscal Years
County:	12/01/2014 - 11/30/2015
Township:	04/01/2014 - 03/31/2015
School:	07/01/2014 - 06/30/2015
State:	10/01/2014 - 09/30/2015

Subtotal:	505.73
Administration Fee:	5.05
Total Tax Due	510.78
Add Penalties	
Adjusted total:	\$

KEEP THIS PORTION FOR YOUR INCOME TAX RECORDS

PLEASE RETURN THIS VOUCHER WITH YOUR PAYMENT
 Make checks payable to: LILY CAVANAGH, TREASURER


CITY OF BURTON
4303 S CENTER RD
BURTON MI 48519-1449

Sign up for Automatic Bill Payment.
Visit www.burtonmi.gov
or call (810) 743-1500.



UTILITY BILL

Billing Questions? Call (810) 743-1500


TRUE NORTH PROPERTIES
7180 MILLER LN
GRAND BLANC MI 48439-7430

0000045

Service Address: 1157 CARMAN ST
Account Number: 0594020
Customer: TRUE NORTH PROPERTIES
Service Period: 07/01/2014 to 09/30/2014
Billing Days: 092
Bill Date: 10/24/2014

Code	PREVIOUS READ INFO			CURRENT READ INFO			Usage	Amount
	Read	Type	Date	Read	Type	Date		
PB								\$0.00
ACCRUED LATE FEES								\$0.00
SW							700	\$58.22
WA	116400	A	06/26/2014	117100	A	09/22/2014	700	\$78.92

TOTAL DUE \$137.14

DUE DATE 11/15/2014

CODE EXPLANATIONS:

PB = Previous Balance	LM = Lawn Water	Type A = Actual Read
WA = Water	SW = Sewer	Type E = Estimate Read

10% late fee charged on accounts not paid by DUE DATE.
If due date falls on a weekend or holiday, payments accepted on next business day.

PLEASE DETACH AND RETURN THIS PART WITH YOUR PAYMENT TO ENSURE PROPER CREDIT.

Checks Payable to:
City of Burton
Treasury - Utilities
PO Box 190419
Burton, MI 48519-0419

Service Address: 1157 CARMAN ST
Account Number: 0594020
Customer: TRUE NORTH PROPERTIES
Service Period: 07/01/2014 to 09/30/2014
Bill Date: 10/24/2014



TRUE NORTH PROPERTIES
7180 MILLER LN
GRAND BLANC MI 48439

Amount Due if Paid By 11/15/2014 \$137.14
Amount Due if Paid After 11/15/2014 \$150.85

Amount Paid _____

05940200000013714111620148

CITY OF BURTON
4303 S CENTER RD
BURTON MI 48519-1449

Sign up for Automatic Bill Payment.
Visit www.burtonmi.gov
or call (810) 743-1500.



UTILITY BILL

Billing Questions? Call (810) 743-1500

LETAVIS CLOTH WASH
PO BOX 27
SWARTZ CREEK MI 48473-0027

Service Address: 4058 S SAGINAW ST
Account Number: 0847060
Customer: LETAVIS CLOTH WASH
Service Period: 09/01/2014 to 09/30/2014
Billing Days: 030
Bill Date: 10/24/2014

0000001

PREVIOUS READ INFO				CURRENT READ INFO			Usage	Amount
Code	Read	Type	Date	Read	Type	Date		
PB								\$0.00
ACCRUED LATE FEES								\$0.00
SW							3200	\$209.84
WA	237000	A	08/29/2014	238000	A	09/30/2014	1000	\$263.00
WA	419700	A	08/29/2014	421900	A	09/30/2014	2200	\$0.00

**DO NOT PAY. YOU ARE SIGNED UP FOR AUTOMATIC BILL PAY.
ACCOUNT WILL BE DEBITED ON THE 15TH OR NEXT BUSINESS DAY.**

TOTAL DUE \$472.84

DUE DATE 11/15/2014

CODE EXPLANATIONS:

PB = Previous Balance LM = Lawn Water Type A = Actual Read
WA = Water SW = Sewer Type E = Estimate Read

10% late fee charged on accounts not paid by DUE DATE.

If due date falls on a weekend or holiday, payments accepted on next business day.

PLEASE DETACH AND RETURN THIS PART WITH YOUR PAYMENT TO ENSURE PROPER CREDIT.

Checks Payable to:
**City of Burton
Treasury - Utilities
PO Box 190419
Burton, MI 48519-0419**

Service Address: 4058 S SAGINAW ST
Account Number: 0847060
Customer: LETAVIS CLOTH WASH
Service Period: 09/01/2014 to 09/30/2014
Bill Date: 10/24/2014



LETAVIS CLOTH WASH
PO BOX 27
SWARTZ CREEK MI 48473-0027

Amount Due if Paid By 11/15/2014 \$472.84
Amount Due if Paid After 11/15/2014 \$520.12

Amount Paid _____

INFORMATION ONLY

08470600000047284111620143



5240 Civic Center Drive
Waterford Twp., MI 48329
Address Service Requested

How to Contact Us

DPW Telephone: (248) 674-2278
DPW Fax: (248) 674-8658
After Hours Emergency
Waterford Police: (248) 674-0351
Winter Hours: Labor Day to Memorial Day: 8 am to 5 pm
Summer Hours: Memorial Day to Labor Day: 7:30 am to 4:30 pm
Drop Box: Available 24 hours a day at the Water Department
Auto-Debit Customer: No

Website: www.twp.waterford.mi.us

Did you know you can . . .

Look up current & past due bills?
Sign up for automatic debit payment?
Report a service issue online?
Pay online with a credit card?



0004667
MATTHEW DOWNS
2800 KEELEY CT
WATERFORD MI 48328-2678

The 2013 Annual Water Quality Report is now available. To view the report visit twp.waterford.mi.us/WaterQualityReport if you would like to request a paper copy, please call 248.674.2278 or visit the DPW at 5240 Civic Center Dr.

SNOWBIRDS- DON'T FORGET TO SCHEDULE YOUR WINTER TURN OFF. \$30.00 FEE WILL BE WAIVED IF YOU SCHEDULE YOUR VANGUARD METER UPGRADE BEFORE YOU LEAVE.

THREE MONTH QUARTERLY BILLING - KEEP THIS STATEMENT FOR YOUR RECORDS - METER READINGS: (Cubic Feet 1 C.F. = 7.48 Gallons)



Charges more than 90 days delinquent as of August 15th become a lien against the property and are placed on the December Tax roll; along with a 10% surcharge.

Important Information

- Failure to Receive Bill Does Not Waive Past Due Penalty.
- Payments Must Be Received by Due Date To Avoid Penalty. Postmark Date is not Relevant.
- If Moving, Call Several Days in Advance With Your Final Meter Reading.
- Pay-off of liens must be processed at the Water Department.
- If paying multiple bills and assessments please include all remittance coupons in the envelope with payment.

Bill Number: 4598376
For Service at Location: 2800 KEELEY CT
Parcel ID: 1324305017
Service Period: 08/01/2014 to 11/01/2014

Code	Description	Current	Previous	Usage	Charge
114	A WATER 5/8"	138000	135800	2200	\$38.59
314	A 5/8" SEWER			2200	\$128.11

Previous Balance: \$0.00
Current Balance: \$166.70
Interest Past Due: \$0.00

Amount Due: \$166.70
Amount **After** Due Date: \$175.04

Billing Code Index

A: Actual
E: Estimated

Account Number 203073	Amount After Due Date \$175.04	Due Date 12/03/2014	Please Pay This Amount \$166.70
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PLEASE DETACH AND MAIL THIS STUB WITH YOUR PAYMENT. WHEN PAYING IN PERSON, PLEASE BRING ENTIRE NOTICE.
Auto-Debit Customers: Please consider this bill informational and do not send a duplicate payment.

10086042014904598376400000166702

Service Address: 2800 KEELEY CT

Charter Twp. of Waterford
Water and Sewer
Dept. 771353
P.O. Box 77000
Detroit, MI 48277-1353

MAKE CHECK PAYABLE TO: Waterford Water & Sewer Dept.

Account Number 203073	Amount After Due Date \$175.04	Due Date 12/03/2014	Please Pay This Amount \$166.70
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Note: Payments Must Be Received by Due Date to Avoid Penalty. Postmark Date is Not Relevant.