

**INVITATION FOR BIDS  
PRINTING AND PRESORTED MAILING OF ASSESSMENT LISTS**

Return bid no later than:  
Time: 5:00 PM Central  
Date: Thursday, September 14, 2023  
Bid contact: Tim Kean  
Telephone: (573) 458-6135  
E-Mail: [personalproperty@phelpscounty.org](mailto:personalproperty@phelpscounty.org)

**Bids must be delivered in sealed envelope.**

Address Bids or Hand Carry to:

Phelps County Assessor  
c/o Phelps County Clerk  
200 North Main Street, Suite 101  
Rolla, Missouri, 65401

***READ CAREFULLY! EACH BID SUBMITTED, AND ANY CONTRACT ISSUED IN RESPONSE TO SUBMITTED BIDS SHALL BE SUBJECT TO ALL INSTRUCTIONS AND CONDITIONS ON THIS AND ALL FOLLOWING PAGES AND ATTACHMENTS HERETO.***

It shall be the sole responsibility of persons submitting a bid to read and follow all instructions and specifications contained herein. Failure to do so is at Contractor's risk.

The bid document must be endorsed by a person authorized to legally bind the Contractor, and all pages returned, *with all required attachments*, prior to the closing date and time in order for the bid to be considered valid. Bids submitted which fail to comply with these provisions will be considered non-responsive and will be rejected without further consideration.

**PART I**  
**INTRODUCTION & SPECIAL INSTRUCTIONS TO CONTRACTORS**

NOTICE IS HEREBY GIVEN: Sealed bids will be received by the Assessor for services required to perform printing and presort mailing services of Assessment Lists for the Assessor's Office in strict accordance with the bid specifications.

AWARD OF CONTRACT: Assessor reserves the right, after opening bids, to reject any or all bids, to waive any informality in a bid, to make awards in the interest of the Assessor's Office and/or County, and to reject all other bids.

INCOMPLETE OR PARTIAL BIDS will be considered non-responsive and will be rejected from further consideration. Email or faxed copies will not be accepted.

DEADLINES indicated below are projected, and the Assessor's Office reserves the right to change dates if necessary. The contractor must possess the ability to meet stated deadline dates, or to work with the Assessor to reschedule any date if deemed necessary by the Assessor.

E-VERIFY: Contractor must provide Assessor with documentation evidencing current enrollment in a federal work authorization program (e.g., electronic signatory page from the E-Verify program's memo of understanding).

WARRANTY: Seller expressly warrants that all articles, materials, work and services covered by the contract will conform to all specifications, drawings, samples or other descriptions which are furnished to or adopted by the Assessor, and that they will be fit and sufficient for the purpose intended, of good material and workmanship, and free from defect. Such warranty shall survive delivery and shall not be deemed waived either by reason of the Assessor's acceptance of said materials or goods, or by payment for them.

TERMINATION OF CONTRACT: The Assessor reserves the right to terminate any contract at any time if the provisions of the contract are violated by the contractor or any of its subcontractors, in the sole judgment and discretion of the Assessor. If the contract is so terminated, the Assessor may purchase upon such terms and in such manner as may be deemed appropriate, supplies or services similar to those so terminated, and the contractor will be liable for additional costs occasioned thereby.

NON-DISCRIMINATION IN EMPLOYMENT: In connection with the furnishing of supplies or performance of work under the contract, Contractor agrees to comply with the Fair Labor Standards Act, Fair Employment Practices, Equal Opportunity Employment Act, and all other applicable federal and state laws, and further agrees to insert the foregoing provisions in all subcontracts awarded hereunder.

PRICES:

- 1) Pricing shall remain firm for the period agreed upon in writing by the bidder and the Assessor. Cost increases may be negotiated with the approval of the Purchasing Director. Increases will be considered only when the Contractor can show that his operating costs have increased. The contractor shall provide written notification of acceptance or rejection of the extension of the contract.
- 2) Quoted prices shall include all costs required to successfully perform the project as described in the bid. Any additional charges not individually noted in the bid document shall be assumed to be included in quoted cost.

INSURANCE REQUIREMENTS: The Contractor shall not commence work under the contract until all insurance required under this paragraph has been obtained and such insurance has been approved by the Assessor, nor shall the Contractor allow any sub-contractor to commence work on their subcontract until all similar insurance required of subcontractor has been so obtained and approved. All policies shall be in amounts, and from carriers satisfactory to the

Assessor and must carry an A-6 or better rating as listed in the A.M. Best or equivalent rating guide. Insurance limits indicated below may be lowered at the discretion of the Assessor.

- 1) Certificate of Workers Compensation which evidences coverage in line with the statutory limits and that Employers Liability section of the policy shall be \$1,000,000.00 each employee, \$1,000,000.00 each accident, and \$1,000,000.00 policy limit. Contractor shall provide General Liability including products and completed operations with limits not less than \$1,000,000.00 per occurrence and \$1,000,000.00 in annual aggregate. If required, contractor will provide proof of Automotive Insurance with not less than \$1,000,000.00 liability per occurrence and Property Damage Liability not less than \$1,000,000.00.
- 2) Proof of Carriage of Insurance -The Contractor shall furnish the Assessor with Certificate(s) of Insurance which name the Assessor and County as additional insured in an amount as required in this contract and requiring a thirty (30) day mandatory cancellation notice. In addition, such insurance shall be on occurrence basis and shall remain in effect until such time as the Assessor has made final acceptance of the project contracted.

**Bid Evaluation:**

- 1) Contractors will identify the name and locality of any and all subcontractors with whom they will be coordinating performance of this project. The location of the subcontractors in proximity to the county will also be a determining factor in contract award.
- 2) Criteria to be considered in evaluating bids will include (1) Primary contractor and proposed subcontractor's responsibility, references, past experience, and technical competence, (2) quality and performance of materials and services for this project, (3) ability to meet deadline dates and to work with Assessor on any required rescheduling, (4) price and other factors relevant to the success of the project, and (5) thoroughness of bid in addressing all issues and satisfying all requirements contained in this bid.

**Amendments to Bid:**

- 1) No modification of, or addition to specifications contained in this document shall be made, or construed to have been made, unless such modification is mutually agreed upon by both parties, and incorporated in a written addendum to the bid.
- 2) Oral instruction, clarification, or information concerning specifications and requirements which is obtained by Contractors from officers, employees, or agents of the Assessor shall not bind the Assessor or the County.

**PART II**  
**ASSESSMENT LIST PRINTING AND MAILING SPECIFICATIONS**

The following specifications outline the printing, data file conversion, processing and mailing for the Assessor's Business and Individual Personal Property Assessment Lists. Your bid will include complete costs for two separate mailings, the initial mailing in Dec/Jan., a second mailing in March, and costs for assessment lists for use in the Assessor's office. In addition, consultation and design costs, and NCOA processing costs for first and second mailings will be included. The successful Contractor must demonstrate to the satisfaction of the Assessor their company's knowledge regarding form printing, data file conversion, bar code imaging, and mail processing conforming to U.S. Postal Service specifications for automated mailings.

**Samples of your work from previous projects and references must be included with your bid.**

*Form Printing Specifications:*

**Personal Property Lists:**

Size: 8.5" x 14" (Grain Long) laser cut sheets

Paper: 28# OCR Bright White. Must be compatible with all Assessor scanning equipment and U.S. Postal Service reading and sorting equipment.

Inks: Face - 3-Colors: Green & 2 PMS Colors (full bleed)

Back 1-Color: Green.

Specific taxpayer information to be variably imaged in black, and optionally in red.

**Business Personal Property Lists:**

Size: 8.5" x 14" (Grain Long) laser cut sheets

Paper: 28# OCR Canary Yellow. Color / contrast ration must be compatible with all Assessor scanning equipment and U.S. Postal Service reading and sorting equipment.

Inks: Face – 2-Colors: Green and PMS Color (full bleed).

Back 1-Color: Green.

**Envelopes:**

Envelopes: Outgoing #10 Custom Window Envelope with clear poly window patch. Custom reply window envelope printed on back in Black ink on 24# white wove with special make-ready flap for ease of opening by Assessor.

**Postcards:**

Size: 5.5" x 4.25"

Paper: 100# White Tag. Must be compatible with U.S. Postal Service reading and sorting equipment.

Inks: Face – Reflex Blue and 185 Red

Back – Pantone Yellow

Specific County and taxpayer information to be variably imaged in black.

**Part III**  
**ALL OTHER BID SPECIFICATIONS**

**QUALITY:** Ink Density and Registration must be consistent in all colors on both sides of the assessment lists. No material received by the Assessor pursuant to the contract shall be deemed accepted until the Assessor has had reasonable opportunity to inspect said material. All material which is discovered to be defective or which does not conform to the warranty of the seller upon inspection or at any later time, if the defects contained in the material were not reasonably ascertainable upon the initial inspection, may be returned at the seller's expense for full credit or replacement. Such right-to-return offer to the Assessor arising from the Assessor's receipt of defective goods shall not exclude any other legal equitable or contractual remedies the Assessor or the County may have therefore.

**ARTWORK:** Composition costs, including costs for multiple revisions, will be included.

**QUANTITIES:** Successful Contractor will guarantee an adequate number of Assessment Lists to meet the needs for both mailings and internal office use. In the event of a shortage, supplier will guarantee makeup quantity at same cost per unit as original bid. Overruns, if included will not exceed 1% of the quantity of forms and envelopes ordered. Unauthorized quantities are subject to the Assessor's rejection and shall be returned at the seller's expense.

**DESIGN/CONSULTATION:** Your bid will include a minimum of 4 hours on-site consultation with the Assessor and/or his representative(s) to work out details of your proposed design for Assessment Lists. You will guarantee that your design conforms to all state legislation in effect prior to final proof date, and that the design meets all requirements of the Missouri State Tax Commission.

**Color copies of the forms, Individual and Business, will be submitted to the Assessor for approval no later than thirty days after notification of awarding the bid and the finished product shall be delivered to the Assessor no later than Dec. 1st.**

**The successful Contractor will arrange approval by the State Tax Commission and provide the Assessor a copy of each assessment form, front and back, individual and business, in Adobe Acrobat PDF format upon approval by the State Tax Commission.**

**DELIVERY SCHEDULE:**

First NCOA reports delivered by the following date: Nov. 15<sup>th</sup>.

Assessment Lists delivered by: Dec. 1st

The initial mailing will drop on the following date: Dec. 31<sup>st</sup> or \_\_\_\_\_

The second mailing will drop on the following date: March 31<sup>st</sup> or \_\_\_\_\_

**DOCUMENTATION:** U.S. Postal Service statements substantiating that the mailings were submitted and processed on the required dates will be provided to the Assessor within 5 working days after the mailing date.

***Imaging of Variable Information (Addressing, etc.):***

The Assessor will provide successful Contractor with data files containing taxpayer names, addresses, taxpayer ID numbers and other information to be printed on the Lists.

Supplier may need to merge data from multiple files to create finished mailing database. There will be 2 or more separate mailings. Data will need to be extracted from the master file based on document type.

**Data File Integrity:** Supplier will guarantee the integrity of all taxpayer records and assume responsibility for printing all related data on the assessment list. Supplier will demonstrate to the satisfaction of the Assessor what steps will be taken to avoid file corruption.

**Placement of Data & Processing Equipment:** Variable information must be accurately lined up with headings, and addresses must be situated to meet specifications for Postal automation discounts. The new design will accommodate all

required variable information including bar codes, and it will be guaranteed to work with printing equipment, scanning equipment, and any other processing equipment used by the Assessor.

***Bar Coding of Taxpayer ID Number:***

Symbology: Interleaved 3 of 9 with Human Readable account number.

Print Quality: All bar codes must scan at ANSI grade "A", and comply with ISO 15416 (formerly ANSI X3.182) standards for bar code print quality. Successful Contractor will demonstrate statistical sampling method used during verification process in the production of bar codes. The Bar Code must be permanent, and continue to be readable for a period of 5 years after initial imaging.

Ability to Scan: Supplier must guarantee bar code decoding with all types of hand scanners and document imaging systems in use by the Assessor.

***Postal Processing:***

Design: The design of the pieces must allow for efficient processing through postal reading and sorting equipment with minimal damage to the piece.

Print Quality: All printed information must be legible, and provide an adequate print contrast ratio to meet postal equipment scanning requirements. Intelligent Mail Barcodes are required on all outgoing and return mail pieces.

***Mailing List Maintenance:***

National Change Of Address (NCOA) list processing services will be provided by successful Contractor. The Assessor requires that NCOA reports contain records with the original address, the new address, and the taxpayer's account number. Costs for this service, including handling of reports, will be itemized on your bid.

Ancillary Postal Endorsements: A cost analysis for the use of Ancillary Postal Endorsements will be provided to the Assessor with your bid. Suggestions for reducing handling and postage costs for undeliverable pieces and for pieces that are forwarded, will be evaluated by the Assessor.

***Postage Costs:***

Reducing postage costs is important to the Assessor. The successful Contractor will guarantee postage discounts based on the automation rates, plus additional discounts for 5-digit sorts, Carrier Route Sorts, DSCF sorts, and any additional presorts that apply. To allow for maximum Postal discounts the physical characteristics of the mail piece and the addressing format must comply with all postal specifications for automated mailings. Supplier will provide exact postage costs based on CASS Certification, and Pre-Sorting of the mailing lists as indicated above and will guarantee these postage costs at time of mailing. Supplier will be responsible for all transactions with the U.S. Postal Service including remitting payment for postage and purchasing all permits required for mailings. Supplier will be reimbursed for postage within sixty days after mailing. If at the time of the mailing it is found that the pieces cannot be mailed at the rate proposed on your original bid you will be responsible for paying the difference in postage costs.

***Shipping:***

Shipping Costs: All shipping costs will be included in your bid. This includes delivery of forms to the Assessor's Office in November - December, and the return of all inventory remaining after the second mailing in March.

**Part IV**  
**ATTACHMENTS**

*The following verbiage / documents must accompany your bid:*

**Bid Document:** Contractors will furnish a bid document including all material and service costs.

**Contract/Agreement:** All Contractors shall include with their bid a written Contract/Agreement signed by an authorized representative of their company. All Contracts/Agreements will include the following two paragraphs in the body of the Contract/Agreement:

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“If \_\_\_\_\_ (contractor) should breach any of the terms, conditions and/or provisions of the Contract/Agreement, requiring the Assessor or the County to pursue legal action to enforce this Contract/Agreement, and /or should \_\_\_\_\_ (contractor) take legal action against the Assessor or the County and not prevail, the Assessor and/or the County shall be entitled to its cost and reasonable attorneys’ fees incurred as the result of any legal action taken, in addition to any damages claimed/incurred by the Assessor and/or the County.”

“Additionally and without waiver of the foregoing, to the fullest extent permitted by law, \_\_\_\_\_ (contractor) shall indemnify and hold harmless the Assessor and the County, its officers, agents and employees from and against claims, damages, losses, expenses, including but not limited to attorneys’ fees, arising out of \_\_\_\_\_ (contractor) performance of the Contract/Agreement. This obligation shall not be construed to negate, abridge or limit the Assessor or the County’s right to indemnification as a result of the acts and/or omissions of \_\_\_\_\_ (contractor) either at law or in equity.”

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**E-Verify:** Contractor must provide Assessor with documentation evidencing current enrollment in a federal work authorization program (e.g., electronic signatory page from E-verify program's memo of understanding).

**Paid Personal Property Tax Receipt:** Contractor must provide a copy of their company’s paid personal property tax receipt.

**Insurance:** Contractor must provide a **Certificate of Workers Compensation** which evidences coverage in line with the statutory limits and that Employers Liability section of the policy shall be \$1,000,000.00 each employee, \$1,000,000.00 each accident, and \$1,000,000.00 policy limit. Contractor shall provide General Liability including products and completed operations with limits not less that \$1,00,000.00 per occurrence and \$1,000,000.00 in annual aggregate. If required, contractor will provide proof of Automotive Insurance with not less that bodily \$1,000,000.00 liability per occurrence and Property Damage Liability not less than \$1,000,000.00.

**Subcontractor Information:** Contractors will identify the name and locality of any and all subcontractors with whom they will be coordinating performance of this project. The location of the subcontractors in proximity to the county will also be a determining factor in contract award.

**Samples of Work:** Samples of your work from previous projects and references must be included with your bid.