

CITY OF GREAT FALLS
REQUEST FOR PROPOSAL & QUALIFICATIONS (RFP)
UTILITY BILL PRINTING & MAILING SERVICES

The City of Great Falls (the City) invites qualified businesses (the Vendor) to submit proposals for providing high quality utility bill printing, folding, stuffing, and mailing services for the City’s utility bills at a competitive price. The successful Vendor will be required to execute an agreement which is substantially in the form as set forth in Exhibit “A”.

This RFP is issued by the City of Great Falls Finance Department – Utility Operations. The Single Point of Contact is Laura Lynch, City of Great Falls Utilities Operations Supervisor: llynch@greatfallsmt.net.

Written proposals using the Official Proposal Form and Fee Schedule will be received until 5:00 pm, MDT, September 30, 2024, delivered to Laura Lynch, Great Falls Utilities Operations Supervisor, 2 Park Drive South, Room 104, Great Falls, MT 59401.

Background Information

The City of Great Falls is home to over 60,000 people. The City of Great Falls provides utilities in the form of water, irrigation, fire lines, sewer, sanitation, fire hydrant, and storm drain. The Utilities Department (Utilities) encompasses Customer Service, Billing, Collections and Analysis, Miscellaneous Receivables, and Payment Posting. City Utilities falls under the direction of the Finance Department. The Mission Statement for the City of Great Falls Finance Department reads, “We will enthusiastically and creatively serve our community by providing a dynamic, progressive and professional working relationship with our customers in an atmosphere of cooperation, respect and fellowship.” It is the focus of Utilities to provide efficient, accessible, and responsive service to our customers while operating under the laws and guidelines of Montana Code Annotated and the Official Code of the City of Great Falls.

Intent

The purpose of this request is to solicit proposals from qualified sources and to select one Vendor to perform utility bill printing, folding, stuffing and mailing services for approximately 22,000 residential and commercial utility customers per month.

Proposal Form

Vendors must use the attached Official Proposal Form and Fee Schedule, marked as Attachment #1, hereinafter referred to as Proposal Documents, or copies thereof in submitting a proposal. The Proposal Documents must be entirely completed. The Vendor may attach additional information, as the Vendor feels is necessary.

Submission Guidelines

Vendors shall provide one original and three identical paper copies of the proposal documents. Additionally, Vendors shall provide one identical electronic copy (on CD or thumb drive) of the proposal documents.

No Proposal

If a Vendor cannot meet a service requirement, then the term "No Proposal" must be entered on the Proposal Form for that specific requirement. In the case of a “No Proposal” remark, the Vendor may offer an alternative equivalent service.

Sealed Proposals

The proposal must be submitted in a sealed envelope or package bearing the title, "Sealed Proposal: City of Great

Falls Utility Bill Printing & Mailing Services". Proposals shall clearly indicate the legal name, address and telephone number of the Vendor. All expenses for making and submitting a proposal to the City shall be borne by the Vendor.

The Vendor must provide an original signature by an individual who is authorized to make representations and commitments on behalf of the Vendor. All sealed proposals must be delivered to: Laura Lynch, Utilities Operations Supervisor, 2 Park Drive South, Room 104, Great Falls, MT 59401, no later than 5:00 pm, MDT, September 30, 2024. It is the responsibility of the Vendor to ensure that the proposal arrives on time at the right place. Any proposals received after the above date and time will not be considered. Alternative proposals for an alternate equivalency for providing a particular service, or to introduce prospective services not identified herein, may be attached and clearly identified as such. However, they will not necessarily be considered in the review and evaluation process.

Public Information

All submitted proposals and information included therein or attached thereto shall become public record upon their opening by the City. Upon submission, proposals become the property of the City and will not be returned to Vendors.

Questions

It is the responsibility of all Vendors to examine the entire RFP package and seek clarification of any item or requirement that may not be clear and to check all responses for accuracy before submitting a proposal. Negligence in preparing a proposal confers no right of withdrawal after the due date and time.

Questions related to the RFP or requests for clarification shall be directed to Laura Lynch, Utility Operations Supervisor, only in writing or by email (llynch@greatfallsmt.net). All inquiries and responses to inquiries will be posted as addenda on the City's website at <https://greatfallsmt.net/rfps>. All questions must be received no later than 12 pm, MDT, on September 13, 2024. It is the responsibility of the Vendor to ensure that they have reviewed all inquiries and responses, and have acknowledged all addenda with their proposal submission.

Right to Reject Proposals

The City reserves the right to reject any or all proposals and the right to accept or reject any item or combination of items that is in the best interest of the City.

Execution of Agreement

The accepted Vendor will sign an agreement with the City acknowledging that the winning proposal is the contract between the two parties. Any changes to the proposal will be agreed upon by both parties, in writing.

Criteria for Selection

Vendors meeting the mandatory criteria will have proposals evaluated for qualifications and price. The City of Great Falls will evaluate proposals based on the following criteria:

1. Prior experience and performance on comparable government engagements (references provided).
2. Completeness of proposal.
3. Quality of services.
4. Demonstrated ability to perform requested services on a consistent, high quality basis.
5. Maintain scheduled timelines.
6. Cost of Vendor's services.
7. Samples of work.
8. Vendor's website access and functionality.

** Criteria are not listed in relative order of importance.*

Qualifications

All proposals from qualified Vendors that are legally sufficient and complete, provide for a satisfactory service level, and indicate experience and references will be considered. The basic required service proposal will be evaluated separately from any optional service proposal. Please make each proposal separate, so that each can be evaluated on its individual completeness and cost criteria.

Vendors must provide at least three references with comparable engagements or substantially similar projects. New World ERP Clients are preferred. Examples of work must be provided. Vendors may be required to satisfactorily prepare statements from a test file for the City's review.

Contract Period

The selected Vendor shall be designated as the City's utility printing, inserting, and mailing Vendor for a minimum three-year period beginning when the contract is awarded, approximately October 15, 2024 and renewable annually thereafter. A Vendor may offer as an additional option a longer contract period as part of their bid. However, the City reserves the right to require a lesser period.

Commencement of Agreement

The selected Vendor will be expected to execute the City's Utility Bill Printing and Mailing Services Agreement after demonstrating that they can provide the services agreed upon.

Professional Service

The Vendor agrees that all services and work performed will be accomplished in a professional manner consistent with a professional standard of practice.

Scope of Services

The City of Great Falls currently generates approximately 22,000 single page utility bills each month. The utility bills are generated weekly, by noon, on the first four Wednesdays of the month. No billing file will be generated in the months where there is a fifth week. If the Wednesday of billing falls on a Federal holiday, billing will commence on the immediately preceding Tuesday.

The bills are created using New World ERP Version 2024.1.3.1 software by Tyler Technologies. Experience with New World preferred. The City is able to generate a print file, which is used for internal tracking and archiving, and an XML file, which is used for the bill run. This information presents on the front page of the bill. The bills are printed on an 8 ½" x 11" paper with a perforated stub at the bottom. The City's logo and information will need to be added to the bill. The back page of the bill contains the ways in which a customer can pay their bill. The City normally includes zero to two inserts each month with the utility bill. A #9 return envelope is included. Bills being mailed to a single mailing address are combined into one envelope.

The current process is that the XML file is uploaded to an FTP site where the City can track the various phases of production. The current bills are front/back. The front of the bill contains all of the billing information from the XML file and is in color. The back page contains black ink and lists ways for the customer to pay the bill. The City is not looking for a redesign of the current bill, but alternate formats would be considered by the evaluation committee.

Inserts

There may be inserts every month in addition to the statement and #9 return envelope. These could either be a 8.5" x 3.75" buckslip, or one 8.5" x 11" sheet folded. The inserts are provided by City departments or nonprofit organizations. These inserts are printed by the City or the nonprofit organizations at their expense. Nonprofit organizations choose a Vendor for printing their inserts. Pricing may be included in this RFP as an additional service to print City inserts. The ability or non-ability of the Vendor to produce inserts will not disqualify a Vendor

from the RFP process for utility bill printing and mailing. Once the inserts are printed, they are provided to the City's Vendor for insertion into the utility bills.

Delinquent Notices

The City will provide XML files on a weekly basis for delinquent notices to be printed and mailed by the Vendor. Pricing may be included in this RFP as an additional service to print delinquent notices. The delinquent notices are printed on an 8.5" x 11" paper with a perforated stub at the bottom. The City's logo and information will need to be added to the notice. The delinquent notices are printed in color.

Pricing

Vendors shall complete Attachment #1 listing all costs to provide the requested services. Pricing proposals must be detailed to include the per item fee, and include initial deployment costs and on-going costs. Pricing must include all costs for labor, hardware, software, hosting, testing, and any other costs to be charged by the Vendor. There shall be no additional charges for jammed or wasted materials or any other overhead. Vendor should include any anticipated rate increases. If a service has been offered by the Vendor as part of this RFP response, and a separate price is not shown on Attachment #1, the cost will be considered included in other prices listed.

References

Please indicate experience in performing this type of work, along with names and phone numbers of specific references. Also, please indicate any prior experience with printing statements prepared by New World ERP software clients along with examples of statements.

Compensation

The Vendor shall invoice the City monthly and the City shall pay for all services within 30 days of receiving an invoice detailing all allowable charges.

Additional Services

The City may, during the term of this contract, desire to purchase additional services from the Vendor in order to enhance the level of service the City provides to its customers. Vendors responding to this RFP should respond in detail regarding their ability to provide optional services. The City encourages Vendors to list any other services they provide that would benefit customers or the City. The inability to provide any optional services will not cause a Vendor's proposal to be declared non-responsive. The ability to provide such services must be in addition to, and readily distinguishable from, the prices quoted for utility bill printing and mailing services.

Vendor's Acknowledgement

The Vendor acknowledges that it may not subcontract any segment or services covered herein, without prior written approval of the City.

Contract Award

The award documentation will subsequently be followed by a contract, substantially in the form as set forth in Exhibit "A" incorporating by reference all of the requirements, terms and conditions of the solicitation and the Vendor's proposal as negotiated.

Vendors whose proposals are not selected will be notified in writing within ten (10) business days of Commission action.

Insurance

The selected Vendor shall provide the City with proof of liability insurance issued by a reliable company or companies for personal injury and property damage, in an amount not less than \$1.0 million for each occurrence. The insurance must be in a form suitable to the City.

Attachment #1 – Official Proposal Form and Fee Schedule

Request for Proposals & Qualifications (RFP)
Utility Bill Printing & Mailing Services

OFFICIAL PROPOSAL FORM

Name of Vendor: _____

If there are any services you provide that are not specified in the proposal and you would like to offer them, please list them along with the associated charges. If a service cannot be met, then the term "no proposal" must be documented.

Please check "yes" or "no" if the service can be provided and add any additional information requested. If the space on this form is inadequate, please feel free to submit attachments identifying the subject matter by the category in bold print and the subcategory you are addressing. Include all costs for the services. Submit additional pages if more room is necessary to show all costs. The City reserves the right to reject any proposal where the total cost per mailed envelope cannot be easily determined.

YES

NO

Can you accept FTP transfer? _____

Do you accept website transfers? _____

If not, what method(s) of transfer do you propose for the City's spooled file?

What format would the information need to be in if FTP transfer is not used?

Printing Statements:

The City uses a standard format for all its bills (see Attachment #2). The City would prefer the Vendor use this format when printing, but will consider alternate proposals. The Vendor may use either preprinted statements or may create the format during printing. All information contained in the transferred file must appear correctly on final statements.

The statement must have a perforated return section at the top for the customer to return with their payment. The stub must contain a barcode specified for each utility account as indicated in the electronic transmission file or print file. The statements must be printed on 24-lb. bond paper minimum.

Attachment #1 – Official Proposal Form and Fee Schedule

Request for Proposals & Qualifications (RFP)

Utility Bill Printing & Mailing Services

Which type of statements will you use?

Preprinted _____

Created During Printing _____

If preprinted, will the Vendor purchase them?

Yes _____

No _____

Do you offer different colors?

No, Only Black & White _____

Yes _____

If so, how many colors are available and is there an additional cost for multiple colors?

In the printing process, are you able to “BOLD” print a specified field?

Yes _____

No _____

If “yes” would there be an extra charge for this?

Yes _____

No _____

Can you print a barcode on the statement?

Yes _____

No _____

Will you meet all requirements listed above?

Yes _____

No _____

If not, please explain:

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Request for Proposals & Qualifications (RFP)
Utility Bill Printing & Mailing Services

Inserting:

The City inserts the statements into a standard #10 window envelope along with a standard #9 return envelope. The return envelope is preprinted with the Utility Department’s mailing address. The City normally has zero to two additional inserts per month to be mailed with the statements.

Can you provide the envelopes?

Yes _____
No _____

**Please include optional separate pricing for #10 and #9 envelope printing. The City reserves the right to choose the Vendor with the most economically priced envelopes. If envelopes are purchased from a third-party provider, the City will arrange transport of the envelopes to the Vendor’s facility.*

Can you insert the statement and return envelope for mailing?

Yes _____
No _____

Can you insert additional mailers?

Yes _____
No _____

How many additional mailers can you insert per month without incurring additional postage? _____

What sizes can the additional mailer(s) be (statement, postcard, etc.)?

Can you fold 8 ½" x 11" mailers during the insert process?

Yes _____
No _____

What type of fold would be necessary for inserting (C-fold, Z-fold, etc.)?

Does the Vendor have the ability to change the format if the City requests it?

Yes _____
No _____

Attachment #1 – Official Proposal Form and Fee Schedule

Request for Proposals & Qualifications (RFP)
Utility Bill Printing & Mailing Services

Are you able to mail combined statements to a single mailing address?

Yes _____
No _____

Mailing:

The Vendor must be able to print, fold, stuff and mail the bills by noon on Thursday. The mailed statements must be sent first class and be CASS certified. The Vendor must use the United States Post Office endorsement "TEMP-RETURN SERVICE REQUESTED".

Can you mail the bills within 24 hours?

Yes _____
No _____

If not, how many days or hours do you propose? _____

Will you agree to use 1st Class bulk rate postage for all utility bills mailed?

Yes _____
No _____

Are you able to mail statements weighing more than 1 ounce without additional costs other than postage and stuffer fees already charged?

Yes _____
No _____

Are you able to omit #9 return envelopes for customers with zero or credit balances, or for customers participating in the City's bank drafting program?

Yes _____
No _____

Can you barcode, sort and CASS certify the utility bills?

Yes _____
No _____

If yes, list your mailing abilities that would lower the postage costs for the City:

Attachment #1 – Official Proposal Form and Fee Schedule

Request for Proposals & Qualifications (RFP)
Utility Bill Printing & Mailing Services

Vendor has examined and carefully reviewed the RFP documents, other related attachments or exhibits identified therein, and the following Addenda (if applicable), receipt of all which is hereby acknowledged:

<u>Addendum No.</u>	<u>Addendum Date</u>
_____	_____
_____	_____
_____	_____

This proposal must be executed in the firm name or corporate name of the Vendor and signed by an officer or other authorized representative.

In witness whereof, this bid proposal is executed on _____, 2024.

Business Name: _____

Address: _____

Authorized Signature _____

Printed Name _____

Title _____

Phone Number _____

Email _____

Attachment #1 – Official Proposal Form and Fee Schedule

Request for Proposals & Qualifications (RFP)
Utility Bill Printing & Mailing Services

FEE SCHEDULE

The Vendor must list all costs associated with the proposal. Any cost of service in the RFP not documented as "No Proposal" will be considered included in the amounts shown on this form.

PRICE PER ENVELOPE MAILED

Includes standard #10 window envelope, standard #9 envelope with return mailing address printed on envelope, statement paper, printing, folding, stuffing, sealed and delivered to the post office.

FIRST-CLASS POSTAGE COSTS

The Vendor can lower the postage costs considerably by using bulk mailing capabilities such as bar coding, sorting, CASS, PAVE, and NCOA certification. The Vendor must show postage prices it can provide currently based on mailing capabilities of the Vendor and should state what can trigger increases in postage charged to the City such as Postal mail cost increases or other.

POSTAGE BREAKDOWN

POSTAGE PRICE CHANGE PARAMETERS

Any changes in postage prices not listed below will not be allowed without approval by the City prior to changes being made.

INSERTS

Provide any charges for stuffing mailers into the utility bills.

8.5" x 3.75", buckslip, 60# or heavier _____

Attachment #1 – Official Proposal Form and Fee Schedule

Request for Proposals & Qualifications (RFP)
Utility Bill Printing & Mailing Services

8.5" x 11" tri-fold _____
Size, Type, & Fold Restrictions:

CHANGES TO UTILITY BILLS

List any charges associated with formatting changes or changing the number of billing cycles:

ADDITIONAL CHARGES

List any additional costs not described above:

PRICE GUARANTEE

The prices listed above, other than postage, are guaranteed through contract term / other:
_____ (Date).

UTILITY BILL PRINTING & MAILING SERVICES AGREEMENT

THIS AGREEMENT is made and entered into this ____ day of ____, 2024 by and between the City of Great Falls, Montana, P.O. Box 5021, Great Falls, MT 59403, hereinafter referred to as "City," and _____, located at _____, hereinafter referred to as "Contractor."

In consideration of the mutual covenants and agreements herein contained, the receipt and sufficiency whereof being hereby acknowledged, the parties hereto agree as follows:

1. Purpose: City agrees to hire Contractor as an independent contractor to perform for City services described in the Scope of Services attached hereto in Exhibit "A" and by this reference made a part hereof.
2. Effective Date: This Agreement is effective upon the date of its execution and will terminate on the 31st day of December, 2027. The parties may extend this Agreement in writing prior to its termination. Should the Agreement be extended, the maximum number of one-year renewal terms shall be three (3) and, therefore, the final Agreement extension shall expire on December 31, 2030.
3. Scope of Work: Contractor will perform the work and provide the services in accordance with the requirements of the Scope of Services.
4. Payment: City agrees to pay Contractor for services performed pursuant to the Scope of Services attached hereto. Any alteration or deviation from the described work that involves extra costs will be performed by Contractor after written request by the City, and will become an extra charge over and above the contract amount. The parties must agree upon any extra charges in writing.
5. Independent Contractor Status: The parties agree that Contractor is an independent contractor for purposes of this Agreement and is not to be considered an employee of the City for any purpose. Contractor is not subject to the terms and provisions of the City's personnel policies handbook and may not be considered a City employee for workers' compensation or any other purpose. Contractor is not authorized to represent the City or otherwise bind the City in any dealings between Contractor and any third parties.

Contractor shall comply with the applicable requirements of the Workers' Compensation Act, Title 39, Chapter 71, MCA, and the Occupational Disease Act of Montana, Title 39, Chapter 71, MCA. Contractor shall maintain workers' compensation coverage for all members and employees of Contractor's business, except for those members who are exempted by law.

Contractor shall furnish the City with copies showing one of the following: (1) a binder for workers' compensation coverage by an insurer licensed and authorized to provide workers' compensation insurance in the State of Montana; or (2) proof of exemption from workers' compensation granted by law for independent contractors.

6. Indemnity and Insurance: To the fullest extent permitted by law, Consultant shall fully indemnify, defend, and save City, its agents, representatives, employees, and officers harmless from and against any and all claims, actions, costs, fees, losses, liabilities or damages of whatever

Exhibit "A"

kind or nature arising from or related to Consultant's negligence and/or errors or omissions in the performance of this Agreement and Consultant's work on the Project contemplated herein or work of any subcontractor or supplier to Consultant. The indemnification obligations of this Section must not be construed to negate, abridge, or reduce any common-law or statutory rights of the City which would otherwise exist. Consultant's indemnity under this Section shall be without regard to and without any right to contribution from any insurance maintained by City. Consultant also waives any and all claims and recourse against the City or its officers, agents or employees, including the right of contribution for loss or damage to person or property arising from, growing out of, or in any way connected with or incident to the performance of this Agreement except responsibility for its own fraud, for willful injury to the person or property of another, or for violation of law, whether willful or negligent, according to 28-2-702, MCA. These obligations shall survive termination of this Agreement and the services performed hereunder.

7. Quality of Service: Contractor agrees that all services and work performed hereunder will be accomplished in a timely fashion and will be of a quality acceptable by industry standards.

8. Compliance with Laws: Contractor agrees to comply with all federal, state and local laws, ordinances, rules and regulations, including the safety rules, codes, and provisions of the Montana Safety Act in Title 50, Chapter 71, MCA, and Prevailing Wage Rates and other provisions as applicable under MCA Section 18-2-401 *et seq.* Contractor agrees to purchase a City business license.

9. Nondiscrimination: Contractor agrees that all hiring by Contractor of persons performing this Agreement will be on the basis of merit and qualification and will not discriminate on the basis of race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, gender identity, sexual orientation, or national origin.

10. Default and Termination: If either party fails to comply with any condition of this Agreement at the time or in the manner provided for, the other party, at its option, may terminate this Agreement and be released from all obligations if the default is not cured within ten (10) days after written notice is provided to the defaulting party. Said notice shall set forth the items to be cured. Additionally, the non-defaulting party may bring suit for damages, specific performance, and any other remedy provided by law. These remedies are cumulative and not exclusive. Use of one remedy does not preclude use of the others. Notices shall be provided in writing and hand-delivered or mailed to the parties at the addresses set forth in the first paragraph of this Agreement.

11. Modification and Assignability: This document contains the entire agreement between the parties, and no statements, promises or inducements made by either party or agents of either party that are not contained in this written Agreement may be considered valid or binding. This Agreement may not be enlarged, modified or altered except by written agreement signed by both parties hereto. The Contractor may not subcontract or assign Contractor's rights, including the right to compensation or duties arising hereunder, without the prior written consent of City. Upon approval by the City, any subcontractor or assignee will be bound by all of the terms and conditions of this Agreement.

12. Ownership and Publication of Materials: All reports, information, data, and other materials prepared by the Contractor pursuant to this Agreement are the property of the City. The City has the

Exhibit "A"

exclusive and unrestricted authority to release, publish or otherwise use, in whole or part, information relating thereto. Any re-use without written verification or adaptation by the Contractor for the specific purpose intended will be at the City's sole risk and without liability or legal exposure to the Contractor. No material produced in whole or in part under this Agreement may be copyrighted or patented in the United States or in any other country without the prior written approval of the City.

13. Liaison: City's designated liaison with the Contractor is Laura Lynch and the Contractor's liaison is _____.

14. Applicability: This Agreement and any extensions hereof shall be governed and construed in accordance with the laws of the State of Montana.

IN WITNESS WHEREOF, the parties hereto have executed this instrument the day and year first above written.

CITY OF GREAT FALLS, MONTANA

CONTRACTOR (Type Name Above)

By _____
Gregory T. Doyon, City Manager

By _____
Print Name _____

Date _____

Print Title _____

Date _____

ATTEST:

(Seal of the City)

Lisa Kunz, City Clerk

*** APPROVED AS TO FORM:**

By _____
David Dennis, City Attorney

* By law, the City Attorney may only advise or approve contract or legal document language on behalf of the City of Great Falls, and not on behalf of other parties. Review and approval of this document was conducted solely from the legal perspective, and for the benefit, of the City of Great Falls. Other parties should not rely on this approval and should seek review and approval by their own respective counsel.

EXAMPLE