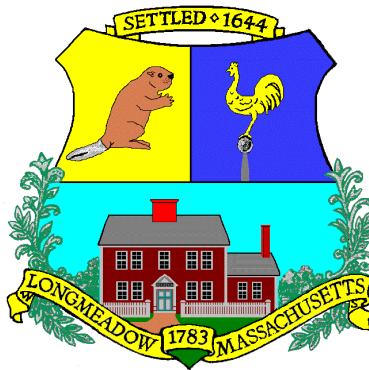


REQUEST FOR PROPOSAL

**MAILING, BILLING & ELECTRONIC INVOICING  
SERVICES**



TOWN OF LONGMEADOW  
MASSACHUSETTS

January 23, 2020

**LEGAL NOTICE:**

**REQUEST FOR PROPOSAL (RFP)  
MAILING, BILLING AND ELECTRONIC INVOICING SERVICES**

The Town of Longmeadow, MA, is accepting proposals for mailing, billing, and electronic invoicing services for municipal tax, real estate and utility account billing. Proposals documents are available from the Town of Longmeadow, Purchasing Department, Attn: Chad Thompson- Procurement Manager, 735 Longmeadow Street, Suite 101, Longmeadow, MA 01106, Phone: 413-565-4185, [cthompson@longmeadow.org](mailto:cthompson@longmeadow.org) . Proposal documents may also be obtained online at [www.longmeadow.org](http://www.longmeadow.org), select 'Government', then 'Purchasing', then 'Bids & RFPs', then 'Bid & RFP Finder', then select bid documents by title. Bidders are encouraged to register with the Longmeadow Purchasing Department to get on the bid list, others will be responsible for monitoring the website for the issuance of notices and addenda. Failure to acknowledge issued addenda may result in a proposal rejection. The contract term will be for one year with renewal option for up to two additional one year terms at the sole discretion of the Town.

Sealed proposals should be delivered to the Purchasing Department and will be received until the proposal deadline of **Thursday, February 6, 2020 at 11:00am**, the outer envelope shall be labeled 'RFP-Mailing Billing and Electronic Invoicing Services'. Within the outer envelope there shall be a separate and sealed Technical Proposal labeled 'Technical Proposal' on the outside of the envelope, and a separate sealed Price Proposal labeled 'Price Proposal' on the outside of the envelope. Late proposals will be rejected. Immediately following the proposal deadline there will be a public logging of proposer names in the auditorium of the same building where the Longmeadow Purchasing Department is located.

The Town of Longmeadow acting through the Town Manager, the Awarding Authority, reserves the right to reject any or all proposals, waive minor informalities, and to award a contract in the best interest of the Town.

## **1. GENERAL INFORMATION AND PROPOSAL SUBMISSION REQUIREMENTS**

The Town of Longmeadow, MA, is accepting proposals for mailing, billing, and electronic invoicing services for municipal tax, real estate and utility account billing. The Town seeks to hire a company to provide electronic invoice presentation and on-line payment capabilities for both tax bills and utility bills. The service will also require billing and utility mailing services. The Town will only reimburse for postage at the US Mail bulk rate postage rate. Proposers submitting proposals must have the capability of performing all of these required services.

The various types of billings will require a different selection of paper stock which will be a visual aid in identifying the bill type. The selection of paper stock and printing format will require pre-authorization from the Town for approval. The window envelopes, envelope format and bill format will also need to be in a format that is approved by the Town. Below is a listing of the type of bill and paper stock that is required.

### Water Bills:

All blue paper, no stripe

### Excise Commitment colors:

1<sup>st</sup> mailing: White paper with yellow stripe,

2<sup>nd</sup> mailing: White paper with green stripe,

3<sup>rd</sup> mailing: White paper with yellow stripe,

4<sup>th</sup> mailing: White paper with green stripe,

5<sup>th</sup> mailing: White paper with yellow stripe,

6<sup>th</sup> mailing: White paper with green stripe

### Personal Property:

White paper with blue stripe

### Real Estate:

White paper with purple stripe

### Demands (all bill types):

White paper with red strip on edge.

The Town has the option to have bills mailed and postage postmarked no less than 3 business days (Monday through Friday) prior to the bill Issue Date which is assigned by the Collector. Notification to the Town shall be provided with confirmation of the date when bills have been mailed.

Currently water meter billing occurs twice per year, and the Town is considering increasing this billing to quarterly. In the event that the billing frequency is increased to quarterly, the unit price submitted by the proposer on the proposal submission forms will be utilized for billing.

The Town shall be assigned an account manager for sourcing questions, service and contract requirements and needs.

The Town will not make any partial awards dividing the award for these required services. The contract term will be for one year with renewal option for up to two (2) additional one year terms at the sole discretion of the Town.

**A. PROPOSAL SUBMISSION INSTRUCTIONS**

Proposals should be submitted in an RFP format and should contain a sealed non-price proposal labeled 'Technical Proposal', and a sealed price proposal labeled 'Price Proposal'

-Non-price (Technical) proposal- Label '**Technical Proposal**'

Proposer should submit in a sealed separate envelope one (1) original and four (4) copies of the non-price Technical Proposal.

-Price proposal- Label '**Price Proposal**'

Proposers should submit one (1) original copy of the Price Proposal in a sealed and separate envelope labeled 'Price Proposal'.

These two separate sealed envelopes should be submitted in an outer envelope that is labeled with the submitter's name and contact information as well as the following title: '**RFP-Mailing, Billing, & Electronic Invoicing Services**'. The outer envelope should be labeled with the name of the submitting company, contact, address, and contact information.

Sealed proposals should be delivered to the Purchasing Department at the following address: Town of Longmeadow, Attn: Chad Thompson-Procurement Manager, 735 Longmeadow Street, Suite 101, Longmeadow, MA 01106. Sealed proposals will be accepted until the **proposal deadline of Thursday, February 6, 2020 at 11:00am**. Late proposals will be rejected. Immediately following the proposal deadline there will be a public logging in the Community House auditorium.

**TECHNICAL PROPOSAL CONTENT:**

The Technical Proposal should be submitted containing the following information:

**Qualifications of the Organization/Firm:**

Describe the background of the firm, the services provided, years in business, and the type of organization (corporation, partnership, etc.). A minimum requirement of five (5) years experience providing mailing and billing service. The proposer must have at minimum six months of experience providing electronic invoicing.

1 **Minimum Requirements:**

Technical Proposals should address the following Minimum Requirements. Failure to meet the Minimum Requirements will result in a proposal rejection. The following are the Minimum Requirements which are mandatory for proposals to receive consideration for a contract award:

- a. The proposer must have a minimum of five (5) years experience providing mailing & billing services for a Massachusetts municipal organization.
- b. The proposer must have experience providing mailing, billing and electronic invoicing services to at minimum five (5) Massachusetts municipalities or Massachusetts government organizations.
- c. The proposer must have a minimum of six months experience providing municipal electronic invoicing.
- d. The proposer must have demonstrated experience providing utility billing service.
- e. The proposer's municipal electronic invoicing on-line bill presentation and on-line payment processing must be compatible with the Town's accounting software

- package- Munis. The proposer must be able to demonstrate the successful implementation with compatibility with Munis including implementation with other Massachusetts municipal communities or community that also utilizes Munis.
- f. The Proposer must have the technology capability to render bills electronically at the customers request through either the website or via an email notification.
  - g. The Proposer must have the capability of bill replication. The company must be capability of providing an on-demand program that allows the Town to reprint replicas of bills on demand that have no licensing restrictions.
  - h. The Proposer must have the capability of providing synchronized Munis and billing and invoicing account history through the electronic program.
  - i. The Proposer must have the capability of providing email notification capabilities for invoice notification, invoice payment receipt, upcoming auto payment, failed auto payment, failed scheduled payments, registration, confirmation, auto payment registration, paperless registration, late fee invoice notice, ACH rejects, credit card expiration and customer registration.
  - j. Needs to have access to work with deputy collectors for offset of pricing (currently \$.10 per bill) for excise bills.

Proposer's should complete the Technical Proposal Submission Form which has a check list section for proposers to confirm their conformance with the minimum requirements.

- 2 Project Staffing:  
Describe the project organization and identify the key staff members to be assigned to this project. Include a resume for each key project team member. Describe their role in the project, their relevant experience and availability to perform their project role. If sub-consultants are to be used, the description of the firm(s) and their role(s) in the project, and resumes of their key project staffing should be identified.
- 3 Project Approach:  
Provide a description that demonstrates the consultant's understanding of the scope of services and the issues involved, along with a proposed strategy for addressing these issues. Elaborate on a proposal plan and provide sufficient detail to demonstrate the methodology and sources the consultant proposes to use to perform the services required.
- 4 Project Schedule:  
Provide a proposed schedule for completion of this project. Include appropriate task durations, milestones and deliverables on the proposed project schedule.
- 5 References:  
Provide a list of all Massachusetts municipal clients that the proposer has active contracts with. Provide the municipality name, contact name, phone number and years of service provided. By providing the reference list, the Proposer is authorizing the Town of Longmeadow to confirm experience and utilize the reference information provided in confirming that a Proposer is responsive and responsible.
- 6 Technical Proposal Submission Forms:  
Proposers are required to submit the Technical Proposal Submission Form provided as instructed in the Proposal Submission Instructions. The Technical Proposal Submission and Technical Proposal Submission Forms should not contain any pricing information. Submit all pricing in the Price Proposal only. A response to all the minimum requirements is required. Acknowledge the receipt of any addendum if any have been

issued, and complete the Certificate of Non-Collusion and Certificate of Tax Compliance form.

**PRICE PROPOSAL CONTENT:**

The Price Proposal should be submitted in a separate and sealed envelope as instructed in the Proposal Submission Instructions. Proposers are required to provide unit pricing per account/bill for each item and year listed on the proposal submission forms. If there is a discrepancy in the pricing, math or interpretation of pricing submitted, the pricing correction will be re-calculated based on the unit price documented by the Proposer on the Price Proposal Submission Form.

**B. TIME FOR PROPOSAL ACCEPTANCE**

The contract will be awarded within sixty (60) calendar days of the proposal due date. The time for award may be extended by mutual agreement between the Town and the submitter of the proposal deemed most advantageous to the Town.

**C. ADDENDA**

If any changes are made to this RFP, an addendum will be issued. Addenda will be faxed, or e-mailed to all parties on record as having picked up the RFP. Bid documents including Addenda can be obtained online through the purchasing department page of the town website [www.longmeadow.org](http://www.longmeadow.org) by following the instructions listed in the legal notice. Bidders are encouraged to register with the Purchasing Department to get on the bid list. Those that do not register with Chad Thompson will be responsible for monitoring the website for the issuance of updates and addenda. Those participating in the RFP process are required to reference this site to confirm if addenda have been issued. Addenda will be posted no later than three days before the bid deadline. Proposers should acknowledge the issuance of addenda on the Proposal Submission Forms.

**D. QUESTIONS**

Questions concerning this RFP must be submitted in writing to the: Town of Longmeadow, Attn: Chad Thompson-Procurement Manager, 735 Longmeadow Street, Suite 101, Longmeadow, MA 01106, Fax: 413-565-4370, [cthompson@longmeadow.org](mailto:cthompson@longmeadow.org) at least 96 hours (four days) before the proposal deadline. No further consideration will be given after the proposal deadline. Questions may be delivered, mailed, or faxed. Written responses will be mailed or faxed to all parties on record as having picked up the RFP. Addenda will be posted on the website no later than three business days before the bid deadline.

**E. CORRECTIONS, MODIFICATIONS**

A proposer may correct, modify, or withdraw a proposal by written notice received by the Town, prior to the time and date set for receipt of proposals. Proposal modifications must be submitted in a sealed envelope, clearly labeled "Modification No. \_\_\_ ". Each modification must be numbered in sequence, and must reference the original RFP. After the receipt of proposals, a proposer may not change any provision of the proposal in a manner prejudicial to the interests of

the Town or fair competition. Minor informalities will be waived or the proposer will be allowed to correct them. If a mistake and the intended price are clearly evident on the face of the price proposal document, the mistake will be corrected to reflect the intended correct price proposal, and the proposer will be notified in writing; the proposer may not withdraw the proposal. A proposer may withdraw a proposal if a mistake is clearly evident on the face of the price proposal document, but the intended correct price proposal is not similarly evident.

**F. RIGHT TO CANCEL OR REJECT**

The Town may cancel this RFP, or reject in whole or in part any and all proposals, if the Town determines that cancellation or rejection serves the best interests of the Town.

**G. UNEXPECTED CLOSURE**

If, at the time of the scheduled receipt of proposals, Community House is closed due to uncontrolled events such as fire, snow, ice, wind, or building evacuation, the receipt of proposals will be postponed the next regular business day at the exact time and location as published in the legal notice or identified bid deadline.

**H. PRICES IN PRICE PROPOSALS**

All prices submitted in response to this RFP must remain firm for sixty (60) days following the receipt of proposals.

**I. WITHDRAWAL**

No Proposer may withdraw his/her proposal for a period of thirty (30) days, excluding Saturdays, Sundays, and legal holidays, after the actual date of the receipt thereof.

**J. PROPOSAL OWNERSHIP**

All proposals, including attachments, supplementary materials, rendering sketches, addenda, etc. shall become upon submission, the property of the Town and will not be returned to the submitting consultant.

**K. AUTHORIZED SIGNATORY**

A proposal must be signed as follows: 1) if the proposer is an individual, by her/him personally; 2) if the proposer is a partnership, by the name of the partnership, followed by the signature of each general partner; and 3) if the proposer is a corporation, by the authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed.

## **L. COMPARATIVE CRITERIA**

Proposals that meet the Minimum Requirements will be evaluated by the Evaluation Committee on the basis of proposal submission, qualifications, and other relevant criteria. Each of the following Comparative Criteria will be ranked by the Evaluation Committee. Proposals should address each of the following items. The ratings listed below will be utilized in evaluating the proposal content

### **1. Relevant technological experience of proposer organization/firm in relation to the service scope of work:**

**Highly Advantageous:** The proposer's organization/firm is considered to be above average to perform the scope of work required for the technological service, based on experience, technological ability relative to the RFP scope of work. Ranking will be based on the opinion of the Evaluation Committee.

**Advantageous:** The proposer's organization/firm is considered to be average to perform the scope of work required for the technological service, based on experience, technological ability relative to the RFP scope of work. Ranking will be based on the opinion of the Evaluation Committee.

**Not Advantageous:** : The proposer's organization/firm is considered to be below average to perform the scope of work required for the service, based on technological experience, technological ability relative to the RFP scope of work. Ranking will be based on the opinion of the Evaluation Committee.

**Unacceptable:** The proposer's organization/firm is considered to be poor to perform the scope of work required for the project, based on technological experience, technological ability relative to the RFP scope of work. Ranking will be based on the opinion of the Evaluation Committee.

### **2. Experience with providing mailing, billing and electronic invoicing services to Massachusetts municipalities:** Proposers with more Massachusetts municipal experience have more knowledge and experience with Massachusetts state requirements.

**Highly Advantageous:** The proposer has contracted with forty five (45) Massachusetts municipal clients or more for these services.

**Advantageous:** The proposer has contracted with thirty five (35) to forty four (44) Massachusetts municipal clients for these services.

**Not Advantageous:** The proposer has contracted with twenty (20) to thirty four (34) Massachusetts municipal clients for these services.

**Unacceptable:** The proposer has contracted nineteen (19) or fewer Massachusetts municipal clients for these services.

### **3. Ability and experience with integrating mailing, billing and electronic invoice services with data supplied through Munis accounting software.**

**Highly Advantageous:** The proposer has experience with and has contracted with forty five (45) or more municipal clients that utilize Munis.

**Advantageous:** The proposer has experience with and has contracted with thirty five (35) to forty four (44) municipal clients that use Munis.



**Not Advantageous:** The proposer has experience with and has contracted with twenty (20) to thirty four (34) municipal clients that use Munis.

**Unacceptable:** The proposer has experience with and has contracted with nineteen (19) or fewer municipal clients that use Munis.

**4. Proposer's demonstrated ability to complete service on a timely basis including technology implementation and training including implementation with Munis, the Town's accounting software program and training:**

**Highly Advantageous:** The Proposal and/or references checked confirm that the related services for other municipal customers were completed on schedule or with minimal, insignificant delays.

**Advantageous:** The Proposal and/or references of one of the municipal customers checked confirm that the project was completed with substantial delays attributed to the Proposer.

**Not Advantageous:** The Proposal and/or references of two of the municipal customers checked confirm that the project was completed with substantial delays attributed to the Proposer.

**Unacceptable:** The Proposal and/or references of three or more of the municipal customers checked confirm that the project was completed with substantial delays attributed to the Proposer.

**5. Evaluation of the proposed plan:**

**Highly Advantageous:** The proposal contains a clear and comprehensive plan that addresses all of the project objectives stated in the RFP.

**Advantageous:** The proposal contains a clear plan that addresses most of the project objectives stated in the RFQ.

**Not Advantageous:** The proposal does not contain a clear plan that addresses most of the project objectives stated in the RFP.

**Unacceptable:** The proposal does not present an understanding of the project objectives and proposed plan.

**Proposals will be rated on these criteria as follows:**

- **Highly Advantageous** -Proposal excels on specified criteria. (3pts)
- **Advantageous** -Proposal fully meets the evaluation standard, which has been specified. (2pts)
- **Not Advantageous** -Proposal does not fully meet the evaluation standard, is incomplete or (1pts) unclear, or both.
- **Unacceptable** -Proposal does not meet the specified criteria. (0pts)

**COMPARATIVE EVALUATION CRITERIA**

The Town of Longmeadow places a premium on the applicants approach to the project and the ability to present a program of services, which complies with the required scope of work in a manner which is clear, concise, and complete with respect to required activities. The Town of Longmeadow will find it unacceptable if such a program of services is not included, or is included in an incomplete manner. Proposals that address required items, but only in general or vague terms that do not adequately represent tasks to be performed, will be given the rating of not advantageous. Each category will be assigned a point rating based on the evaluation of the

committee 0-3 pts (points). Award preference will originally be based on the ranking of the most highly advantageous Technical Proposal; however, the results of the Price Proposal will ultimately play a factor in objectively determining the contract award. The contract award will be awarded to the contractor who has the highest ranking Technical Proposal and Price Proposal that is deemed to be the best value for the price based on the opinion and recommendation of the Town's Evaluation Committee.

**M. AWARD OF CONTRACT**

There will be a single contract award for the mailing, billing and electronic invoicing services which is inclusive of electronic invoice presentation and on-line payment capabilities. Proposals received from proposers that are not able to provide the full scope of services will be rejected. The contract will be awarded based on the most advantageous proposal from the proposer that is responsive and responsible taking into consideration of price and the evaluation criteria as evaluated by the Town's evaluation committee.

**N. CONTRACT TERMS AND CONDITIONS**

The sample contract terms and conditions of the 'Agreement' are provided. Proposers should not complete this contract for submission with their proposal.

**AGREEMENT**

The following provisions shall constitute an Agreement between the Town of Longmeadow, acting by and through its Town Manager and/or Select Board, hereinafter referred to as "Town", and VENDOR TBD with an address of TBD hereinafter referred to as "Contractor", effective as of the first day of April, 2020. In consideration of the mutual covenants contained herein, the parties agree as follows:

**ARTICLE 1: SCOPE OF WORK:**

The Contractor shall perform all work in accordance with the specifications contained in Attachment A - Scope of Services: Town of Longmeadow, Request for Proposal documents: 1)Mailing, Billing & Electronic Invoicing Services dated January 23, 2020; 2)Addendum No.....(if any).

**ARTICLE 2: TIME OF PERFORMANCE:**

The contractor shall complete all work and services required on or before March 31, 2021. The contract term will be for one year with renewal option for up to two additional one year terms at the sole discretion of the Town. Contract pricing shall remain the same as submitted in the proposal.

**ARTICLE 3: COMPENSATION:**

The Town shall pay the Contractor for the performance of the work outlined in Article 1 above, based on unit pricing per individual utility, personal property, real estate tax and excise tax bill for actual mailing and billing services, electronic invoicing provided, etc. Compensation shall be based on unit pricing as documented in Attachment B, the Price Proposal. The Town will only reimburse for postage at the US Mail bulk rate postage and actual postage rate when non-bulk mailings are authorized.

**ARTICLE 4: CONTRACT DOCUMENTS:**

The following documents form the Contract and all are as fully a part of the Contract as if attached to this Agreement herein:

1. This Agreement.
2. Amendments, or other changes mutually agreed upon between the parties.
3. All attachments to the Agreement.

In the event of conflicting provisions, those provisions most favorable to the Town shall govern.

**ARTICLE 5: CONTRACT TERMINATION:**

The Town may suspend or terminate this agreement by providing the Contractor with ten (10) days written notice for the reasons outlined as follows:

1. Failure of the Contractor, for any reason, to fulfill in a timely and proper manner its obligations under this Agreement
2. Violation of any of the provisions of this Agreement by the Contractor.
3. A determination by the Town that the Contractor has engaged in fraud, waste, mismanagement, misuse of funds,  
or criminal activity with any funds provided by this Agreement.
4. The contract may be terminated for convenience by the Town.

**ARTICLE 6: INDEMNIFICATION:**

The Contractor shall, to the maximum extent permitted by law, indemnify and save harmless the Town of Longmeadow, its officers, agents and employees from and against any and all damages, liabilities, actions, suits, proceedings, claims, demands, losses, costs and expenses (including reasonable attorneys' fees) that may arise out of or in connection with the work and/or service being performed or to be performed by the Contractor, its employees, agents, or subcontractors. The existence of insurance shall in no way limit the scope of this indemnification. The Contractor further agrees to reimburse the Town of Longmeadow for damage to its property caused by the contractor, its employees, agents, subcontractors or materials. Contractor shall be solely responsible for all local taxes or contributions imposed or required under the Social Security, Workers Compensation, and income tax laws.

**ARTICLE 7: AVAILABILITY OF FUNDS:**

The compensation provided by this Agreement is subject to the availability and appropriation of funds. The contractor shall be obligated to provide services hereunder, only to the extent that said funds are available.

**ARTICLE 8: APPLICABLE LAW:**

The Contractor agrees to comply with all applicable local, state and federal laws, regulations and orders relating to the completion of this Agreement. This Agreement shall be governed by and construed in accordance with the law of the Commonwealth of Massachusetts.

**ARTICLE 9: ASSIGNMENT:**

The Contractor shall not make any assignment of this Agreement without the prior written approval of the Town.

**ARTICLE 10: AMENDMENTS:**

All amendments or any changes to the provisions specified in this Contract can only occur when mutually agreed upon by the Town and Contractor. Further, such amendments or changes shall be in writing and signed by officials with authority to bind the Town. Additionally, all amendments and changes shall be approved by the Town Accountant prior to execution by the awarding authority. No amendment or change to the contract provisions shall be made until after the written execution of the amendment or change to the Contract by both parties.

# TECHNICAL PROPOSAL SUBMISSION FORM

## REQUEST FOR PROPOSAL (RFP) MAILING, BILLING AND ELECTRONIC INVOICING SERVICES TOWN OF LONGMEADOW

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**COMPANY NAME:** \_\_\_\_\_

**MINIMUM REQUIREMENTS:** Technical Proposals should address the following Minimum Requirements. Failure to meet the Minimum Requirements will result in a proposal rejection. The following are the Minimum Requirements which are mandatory for proposals to receive consideration for a contract award. Provide a response of 'Yes' if the Proposer is able to currently meet the minimum requirement, or provide a response of 'No' if the proposer is not currently able to meet the minimum requirement:

- a. The proposer must have a minimum of five (5) years experience providing mailing & billing services for a Massachusetts municipal organization.  
**YES**\_\_\_\_, **NO**\_\_\_\_\_
- b. The proposer must have experience providing mailing, billing and electronic invoicing services to at minimum five (5) Massachusetts municipalities or Massachusetts government organizations.  
**YES**\_\_\_\_, **NO**\_\_\_\_\_
- c. The proposer must have a minimum of six months experience providing municipal electronic invoicing.  
**YES**\_\_\_\_, **NO**\_\_\_\_\_
- d. The proposer must have demonstrated experience providing utility billing service.  
**YES**\_\_\_\_, **NO**\_\_\_\_\_
- e. The proposer's municipal electronic invoicing on-line bill presentation and on-line payment processing must be compatible with the Town's accounting software package- Munis. The proposer must be able to demonstrate the successful implementation with compatibility with Munis including implementation with other Massachusetts municipal communities or community that also utilizes Munis.  
**YES**\_\_\_\_, **NO**\_\_\_\_\_
- f. The Proposer must have the technology capability to render bills electronically at the customers request through either the website or via an email notification.  
**YES**\_\_\_\_, **NO**\_\_\_\_\_

# TECHNICAL PROPOSAL SUBMISSION FORM

## REQUEST FOR PROPOSAL (RFP) MAILING, BILLING AND ELECTRONIC INVOICING SERVICES TOWN OF LONGMEADOW

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(Minimum Requirements, continued)

- g. The Proposer must have the capability of bill replication. The company must be capable of providing an on-demand program that allows the Town to reprint replicas of bills on demand that have no licensing restrictions.  
YES\_\_\_\_, NO\_\_\_\_
- h. The Proposer must have the capability of providing synchronized Munis and billing and invoicing account history through the electronic program.  
YES\_\_\_\_, NO\_\_\_\_
- i. The Proposer must have the capability of providing email notification capabilities for invoice notification, invoice payment receipt, upcoming auto payment, failed auto payment, failed scheduled payments, registration, confirmation, auto payment registration, paperless registration, late fee invoice notice, ACH rejects, credit card expiration and customer registration.  
YES\_\_\_\_, NO\_\_\_\_
- j. The Proposer needs to have access to work with the Depty Collector for offset of pricing (\$.10 per bill) for excise bills.  
YES\_\_\_\_, NO\_\_\_\_

### **ACKNOWLEDGEMENT OF ADDENDA:**

The proposer acknowledges the receipt of the following Addenda (if any): \_\_\_\_; \_\_\_\_; \_\_\_\_; \_\_\_\_; \_\_\_\_

### **SUBMISSION CONTENT INFORMATION FOR THE TECHNICAL PROPOSAL:**

1. Supply a list of Massachusetts municipal clients of the proposer. Include municipal name, contact name and contact information. Have you supplied the list of Massachusetts clients?  
YES\_\_\_\_ NO\_\_\_\_
2. Supply a list of municipal clients that utilize Munis accounting software for the mailing and billing implementation of data. Have you supplied the list of municipal clients that utilize Munis?  
YES\_\_\_\_ NO\_\_\_\_

### **PROPOSAL SUBMISSION REQUIREMENTS:**

As stated on the second page of this RFP (the Legal Notice) have you submitted your proposal with two separate sealed envelopes, one containing the 'Technical Proposal' and the other envelope containing the 'Price Proposal'? Price Proposal information can't be included in the Technical Proposal.

YES\_\_\_\_ NO\_\_\_\_

# TECHNICAL PROPOSAL SUBMISSION FORM

## REQUEST FOR PROPOSAL (RFP) MAILING, BILLING AND ELECTRONIC INVOICING SERVICES TOWN OF LONGMEADOW

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### CERTIFICATE OF NON-COLLUSION: REQUIRED FORM

The undersigned certifies under the penalties of perjury that this bid or bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business partnership, corporation, union, committee, club or other organization, entity or group of individuals.

\_\_\_\_\_  
Signature of person submitting contract/bid

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of Business

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### CERTIFICATE OF TAX COMPLIANCE

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Social Security Number or

\_\_\_\_\_  
Signature of Individual or

Federal Identification Number

\_\_\_\_\_  
Corporate Name

\_\_\_\_\_  
*Corporate Officer*  
*(if applicable)*

# **PRICE PROPOSAL SUBMISSION FORM**

## **REQUEST FOR PROPOSAL (RFP) MAILING, BILLING AND ELECTRONIC INVOICING SERVICES TOWN OF LONGMEADOW**

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**COMPANY NAME:** \_\_\_\_\_

### **PRICE PROPOSAL**

Proposers must submit pricing in accordance with the below instructions. Proposers must submit prices for all years of the contract. The proposed pricing is to cover all work/services required for this project as outlined in the Technical Proposal portion of this RFP document. Prices must be all-inclusive, including all costs, fees, charges, expenses, travel, postage, fax and telephone charges, preparation of reports, printing, stuffing, sealing, barcoding, envelopes, metering (excluding direct postage reimbursement), mailing, and all meeting attendance if required. No separate fees or costs of any kind will be paid other than the stated prices.

### **PRICE ESCALATION CLAUSE**

Prices offered by the Proposer must be firm and not subject to increase during the term of the contract. Price escalation clauses over and above the total submitted prices are not allowed. Only the total proposed prices will be accepted. Proposers can not insert/include a statement indicating their prices will increase above or beyond their submitted proposed prices due to third party actions or unnamed contingencies. Inclusion of an escalation clause of any kind will result in the REJECTION of the proposal.

### **PROPOSAL PRICING CALCULATION**

The following proposal pricing will be used/considered as a factor in the final selection of a vendor in addition to all other required criteria in this RFP. The total proposal price will be determined by adding up the total prices for each of the seven items, for all three years, under the following "Proposal Pricing" section.

# PRICE PROPOSAL SUBMISSION FORM

## REQUEST FOR PROPOSAL (RFP) MAILING, BILLING AND ELECTRONIC INVOICING SERVICES TOWN OF LONGMEADOW

**COMPANY NAME:** \_\_\_\_\_

The undersigned proposes and agrees, if this proposal is accepted, that they will contract with the Town, in the forms of contract referred to herein, to provide all supply and services herein prescribed based on the following unit prices:

### PROPOSAL PRICING

Using the following mailing/printing scenarios, please provide unit pricing for each of the seven jobs below for a three year term.

1. Item #1: Please price out the cost to invoice annually the Water Bills
  - a. Year 1= Unit price for two billings per year, per account (5,710 accounts X 2 billings= 11,420 billings per year)
  - b. Year 2= Unit price for two billings per year, per account (5,710 accounts X 2 billings= 11,420 billings per year)
  - c. Year 3= Unit price for two billings per year, per account (5,710 accounts X 2 billings= 11,420 billings per year)
2. Item #2: Price out the unit cost to invoice annually 1,800 water bills demand notices
3. Item #3: Please price out the cost to invoice annually 250 Personal Property bills per year
4. Item #4: Please price out the cost to invoice quarterly 5,700 Real Estate Tax bills per year
5. Item #5: Please price out the cost to invoice annually a total of 2,000 Real Estate and Personal Property Demand notices per year
6. Item #6: Please price out the cost to invoice six annual Excise mailings totaling 18,000 bills
7. Item #7: Please price out the cost to invoice an estimate of 2,500 Excise Demands
8. Item #8: Please price out the cost to electronic invoicing of 44 paperless bills

### **YEAR 1**

#### **Pricing – Item #1: Water Bills**

a. Unit Price per Account/Bill= \$ \_\_\_\_\_ x 11,420= \$ \_\_\_\_\_

#### **Pricing – Item #2: Water Demand Notices**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 1,800= \$ \_\_\_\_\_

#### **Pricing – Item #3: Personal Property Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 250= \$ \_\_\_\_\_

#### **Pricing – Item #4: Real Estate Tax Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 22,800= \$ \_\_\_\_\_

#### **Pricing – Item #5: Real Estate & Personal Property Demands**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 2,000= \$ \_\_\_\_\_



# PRICE PROPOSAL SUBMISSION FORM

## REQUEST FOR PROPOSAL (RFP) MAILING, BILLING AND ELECTRONIC INVOICING SERVICES TOWN OF LONGMEADOW

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**Pricing – Item #6: Excise Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 18,000= \$ \_\_\_\_\_

The unit price should not include the \$.10 offset expense that the Deputy Collector reimburses directly to the awarded mailing & billing service contractor.

**Pricing – Item #7: Excise Demand Notices**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 2,500= \$ \_\_\_\_\_

**Pricing – Item #8: Electronic Invoicing**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 44= \$ \_\_\_\_\_

**YEAR 1 TOTAL (Yr 1 Total of line items 1 through 8) = \$ \_\_\_\_\_**  
**YEAR 2**

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**Pricing – Item #1: Water Bills**

b. Unit Price per Account/Bill= \$ \_\_\_\_\_ x 11,420= \$ \_\_\_\_\_

**Pricing – Item #2: Water Demand Notices**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 1,800= \$ \_\_\_\_\_

**Pricing – Item #3: Personal Property Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 250= \$ \_\_\_\_\_

**Pricing – Item #4: Real Estate Tax Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 22,800= \$ \_\_\_\_\_

**Pricing – Item #5: Real Estate & Personal Property Demands**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 2,000= \$ \_\_\_\_\_

**Pricing – Item #6: Excise Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 18,000= \$ \_\_\_\_\_

The unit price should not include the \$.10 offset expense that the Deputy Collector reimburses directly to the awarded mailing & billing service contractor.

**Pricing – Item #7: Excise Demand Notices**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 2,500= \$ \_\_\_\_\_

**Pricing – Item #8: Electronic Invoicing**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 44= \$ \_\_\_\_\_

**YEAR 2 TOTAL (Yr 2 Total of line items 1 through 8) = \$ \_\_\_\_\_**

**COMPANY NAME: \_\_\_\_\_**

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# PRICE PROPOSAL SUBMISSION FORM

## REQUEST FOR PROPOSAL (RFP) MAILING, BILLING AND ELECTRONIC INVOICING SERVICES TOWN OF LONGMEADOW

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### YEAR 3

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**Pricing – Item #1: Water Bills**

c. Unit Price per Account/Bill= \$ \_\_\_\_\_ x 11,420= \$ \_\_\_\_\_

**Pricing – Item #2: Water Demand Notices**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 1,800= \$ \_\_\_\_\_

**Pricing – Item #3: Personal Property Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 250= \$ \_\_\_\_\_

**Pricing – Item #4: Real Estate Tax Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 22,800= \$ \_\_\_\_\_

**Pricing – Item #5: Real Estate & Personal Property Demands**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 2,000= \$ \_\_\_\_\_

**Pricing – Item #6: Excise Bills**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 18,000= \$ \_\_\_\_\_

The unit price should not include the \$.10 offset expense that the Deputy Collector reimburses directly to the awarded mailing & billing service contractor.

**Pricing – Item #7: Excise Demand Notices**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 2,500= \$ \_\_\_\_\_

**Pricing – Item #8: Electronic Invoicing**

Unit Price per Account/Bill= \$ \_\_\_\_\_ x 44= \$ \_\_\_\_\_

**YEAR 3 TOTAL (Yr 3 Total of line items 1 through 8) = \$ \_\_\_\_\_**

**COMPANY NAME:** \_\_\_\_\_

# **PRICE PROPOSAL SUBMISSION FORM**

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**REQUEST FOR PROPOSAL (RFP)  
MAILING, BILLING AND ELECTRONIC INVOICING SERVICES  
TOWN OF LONGMEADOW**

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Other Pricing for Stuffers:

Supply a price structure for inserting full page and 1/3 page insert stuffers. Stuffers may involve color paper and color printing. Have you supplied a pricing structure for billing stuffers?

YES\_\_\_\_ NO\_\_\_\_\_

Give full name and address of individual or concern submitting this proposal:

NAME \_\_\_\_\_  
COMPANY \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
\_\_\_\_\_

PHONE \_\_\_\_\_  
FAX \_\_\_\_\_  
EMAIL \_\_\_\_\_

SIGNATURE \_\_\_\_\_  
TITLE \_\_\_\_\_

**NOTICE:**

Proposal should be signed in ink by a person having proper legal authority, and the person's title should be given such as "owner" in the case of individual; "partner" in the case of a general partnership; "president", "treasurer" or other authorized office in the case of a corporation.