

RFP-RH-18-041					
Design, Printing and Distribution of the Rochester Hills	TouchPoint Customer Communications 3932 Miller Road Newton Square, PA 19073-2999	The Master's Touch, LLC 1405 N. Ash Street Spokane, WA 99201	The Data Center 1827 South Fremont Drive Salt Lake City, Utah 84104	Utilitec - An Ancor Company 1911 Woodslee Drive Troy, MI 48083	SouthWest Direct, Inc. 2129 Andrea Lane Fort Myers, FL 33912
Firm Established:	1991	1994	1993	1985	1988
Years in Business:	27	24	25	33	30
Type of Organization:	Corporation	LLC	Corporation	Corporation LLC	Corporation
How many years providing Printing and Distribution Service?	Founded in 1991, through collaborative development of its unique blend of printing and data processing experience to evolve into advanced variable data print and mail operations with a national base.	24 years	Has been mailing and printing confidential information to their customers for 25 years. Work with complex data and can provide mail accuracy. Able to work with almost any data format.	Utilitec is a business unit of their parent company-Ancor Information management. Ancor has been in the data management, printing and mailing business since 1985. In 2002, Ancor acquired Utilitec and brought the business to Detroit. Utilitec had been in business 12 years prior to acquisition.	Has been in the print and mail business for 30 years. They have been handling critical documents for the last 20 of those years.
How many clients with the type of services described. Names and contact information of five.	Has over 60 clients in the municipal market. List provided.	Currently provides printing and mailing services for over 700 clients across 22 states and every time zone. List provided.	They have 50 that they do business with on a regular basis. List provided.	Utilitec works exclusively with municipalities and utilities that choose to outsource the bill printing and mailing function of their business. Their business revolves around the technology and processes that provide value to the utility sector. With this business model in place, Utilitec currently has 55 utility contracts in place. List provided.	Currently mails statements for 50 cities and hospitals. They also print and mail tax notices, trim notices, monthly DMV renewals, and vote by mail ballots. List provided.
Five (5) Client references.	List provided.	List provided.	List provided.	List provided.	List provided.
Full-time employees:	12	32	20	110	48
Part-time employees:	4	1	2	5	0
Do you provide the zip + 4 service?	Yes. TouchPoints CASS certification service standardizes mailing addresses.	Yes, USPS CASS certification as well as NCOA (notice of change of address) service.	Yes, uses software packages including PAVE, CASS and NCOALink certified software that assists their operators in sorting mail pieces.	They use Quadiant Architect (formerly Satori) for their coding Accuracy Support System (CASS) certification.	Yes, that is part of their presort process which allows the City of Rochester Hills to receive all first-class presort postage automation discounts.
Is there a separate cost for the zip + service?	No	No, CASS and NCOA are included in TMT's standard processing at no additional cost.	No, it is included in pricing.	No	No separate charge.
Do you keep your certificate updated?	Yes. Receives regular USPS address updates and is CASS certified.	Yes, they would be unable to get postal discounts without a current certificate.	Yes.	Yes. Procures regular USPS address database updates to provide the most accurate mailing database.	Yes, all of their software, including zip+ 4 service are kept up to date. Their IT staff is in charge of checking when these certificates expire and renewing them in a timely manner
What post office would you deliver bills to for mailing?	USPS Post Office West Chester, PA Bulk Mail Unit. After processing their clients daily workload, TouchPoint makes 3 deliveries a day to USPS.	Will be inducting the City's mail into the Spokane Sectional Center Facility (SCF). SCF is a main processing center with the equipment to read the Intelligent Mail Barcode and direct the mailing accordingly	Salt Lake city's main BMEU.	They utilize the USPS Michigan Metroplex P&DC in Pontiac, MI. It is located 9 miles from the City of Rochester Hills.	Fort Myers, Florida Business Mail Unit.

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Can you firm comply with processing and delivery specifications? Describe how this will be met.	After initial set up, Touchpoint will automate the process for proof approval and Rochester Hills Water Dept. will be able to almost instantaneously view their water bills on a secure website for proof approval. Once approval is given TouchPoint will have the utility bills to the Post Office within 24 hours.	Yes. IT team alerts mission managers as soon as files have been received and collaborate to implement the printing process. The production team stands by to ensure printing, folding, and stuffing is completed in an accurate and timely fashion by their specialized equipment. Mail is then boxed and delivered via truck to the SCF by their delivery team. The process from file receipt to delivery to the post office can be completed within 12 hours.	Has the ability to make changes and handle additional requests in a timely manner. Files received before 9:00 am are processed and mailed the same day. Files received after 9:00 am will be delivered to the post office by the next day.	Utilitec has chosen to work exclusively with utilities and municipalities nationwide. As a result their processes and equipment specifications have been designed to guarantee 24 hour turnaround as a standard.	Yes, all of their clients are on a 24 hour turnaround. They begin processing their files at 5:00 am every morning, which in turn allows them to stick to the agreed upon schedule.
Firm capable of creating and printing the barcode and OCR scan line?	Yes. Over half of their clients have a barcode and scan lie. TouchPoint is capable of creating, testing and printing barcodes and scan lines.	Yes, capable and already performs this task for the majority of their 700 accounts. The OCR scanning equipment has specific specifications that must comply with, so their programmers will code the scan line according to those specs. This includes font size, location and appropriate clearance.	They have experience with new software applications and mapping data to present the most clearly printed image possible. They are able to create custom barcodes and OCR scan lines. They have worked with many different styles over the years.	Yes. Most clients the work with utilize OCR technology. They have experience designing statements, notices and letters that use OCR remittance equipment. Their document composition software, GMC will create the appropriate OCR scan line including size, font and placement.	Yes, has the proper employees, tools and softwares to create any necessary barcodes. They will follow sample provided by the City to ensure they are meeting proper font and position requirements.
Will your firm comply with the bank supported lockbox specs?	Yes, TouchPoint is very familiar with testing and complying with lockbox specifications.	Yes, they will simply need those specifications once a contract is finalized.	Yes. Statements/bills will be programmed to City and banks specifications. They create samples for them to test. No bills are printed without City and banks approval.	Yes.	Yes, as long as said bank provides them with specifications, they are fully capable of complying to ensure the specifications work for all parties.
Will you subcontract any of the services?	No	No	No	No	No
Can your firm provide any options that would be beneficial to the process?	Electronic Bill Presentment and Payment (EBPP)- An electronic online archival storage portal which would give designated users' desktop access to PDF's of all City Utility Bills printed. This would generate significant postage savings. House holding-Software generates House holding within a mail file, and processes USPS presort for each envelope after this house holding occurs.	eNotices service is convenient and inexpensive means for getting statements to your customers across the country. Currently eNotices has a repository of over 25 million statements available for secure web viewing. They have a fully integrated and PCI compliant payment processor, allowing customers a seamless and easy method to pay their bills online.	Is a Critical Document print and mail company. They provide maximum-security features for both facility and data transportation. Can create custom messages and custom graphs on bills. Selective inserting.	Yes. They have listed EBPP, Online-Self Service Portal, Mobile, IVR, Pay by text, ebill, Kiosk, Autopay as items that could be beneficial to the City. Detailed description in response for each item.	Is set up to provide online bill presentment and e-delivery. Customers who request e-bills will still view the bill but instead as a pdf and will click a link to pay which would then bring them to the City's payment processing site. Their high speed inserters are able to do groupings for multiple pages as well as selectively to insert or not insert reply envelopes or specific inserts.
Describe the firm's experience with other customers or communities in the type of services described.	Mission is to provide print and mail services with attention to regulatory compliance and security. Research and invest in leading technology and maintain a working knowledge of USPS regulations in order to ensure clients objectives are met.	Serves over 700 private and public sector organizations. Client mailings range from 1,000 to 1.5 million. Turnaround times are short and they have only missed on deadline in 20 years.	See attachment 3 for detailed information.	Experience in assisting water, gas and electric utilities that have made the decision to outsource this function of their business. A few examples in response.	Has been working with cities, counties, hospitals, municipalities, tax collectors, property appraisers and supervisors of elections for over 15 years. Majority of these clients are mailed daily, weekly, and monthly.

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Describe work program to deliver the printing and distribution requirements.	Designs all forms with variable fields on the templates. Both template and data are printed simultaneously on blank paper. Water and Sewer Dept. will have the ability to set up defined data and business rules to correspond with your data requirements.	Maintains multiple pieces of the same equipment at each of their locations for the purpose of redundancy and continuous production even when machines is down for maintenance. Their Tempe, AZ and Spokane, WA facility are mirror images of each other so that disaster recovery can be initiated within hours of a catastrophic event, virtually eliminating any delays.	Will start by understanding what each type of correspondence will require to be printed and mailed. They will create a custom program to City's specifications. Each account has a dedicated	Data Processing-transmitted data can be imported into a database for further processing and data is merged with electronic forms for printing. Printing-Capabilities include black and white printing, highlight and full color printing, minimum 300 DPI, letter and legal-size printing. Document folding and inserting-Technology that is capable of inserting mail pieces at a rate of 12,000 per hour.	Has extensive experience working with cities. They provide a service from beginning to end, starting with giving the city an option to completely redesign their bill, all the way to the delivery to the post office. The project manager will be responsible for planning, monitoring and controlling the project.
From receipt of the City's data, explain how the City is kept updated throughout the process.	City would be provided with a personalized portal to their secure services network which will allow the Dept. of Utilities the ability to view, change and approve template design stage, to view all PDF print images of Utility Bills prior to printing during approval stage, and review production status during printing and fulfillment stage.	Will provide a sandbox environment to test all services being provided. This includes automation of processes for print and mail, web services, and customer portal. Initial setup will happen in the sandbox environment and will not be moved into production until the process is satisfactory to the City and TMT. Any changes needed to process will also occur in the sandbox first until the changes are approved and only then will it move into live production.	Creates a customized communication plan for each account based on the customers needs. Have created a specific work order for each of their customers based on their parameters of each job.	Reporting statistics will be made available immediately and will be emailed to City or accessed through their Utrack job tracking module. Examples of available reports include when file was received, when file was set up processing, confirmation sample PDF, client approval, production, when mailing is complete and USPS tracking.	The City will upload data via SouthWest direct's secure FTP site. One of their IT employees will put the data and begin to process it through NCOA and CASS certification as well as create proofs. At that point, the City will receive a confirmation email. this email will include the file name and quantity of the original file uploaded. The City will now know that proofs and postage reports have been uploaded to the FTP for viewing and approval. They fulfill the job and mail within 24-48 hours of receipt of data.
Do you provide reports based on the data received from the City?	Has unlimited reporting capabilities. Standard or customized reports will be sent to City of Rochester fulfill or exceed the requirements contained in the bid.	During the testing stage, they provide sample reports showing the mailing properties for each data file, including number of pages printed, total number of envelopes inserted, how many envelopes, etc. Once live production starts City can verify activity with every print and mail job.	Their systems are all designed to provide a level of accuracy for the variable data process. Each step of production process is also a checkpoint for the accuracy of the previous step. Their equipment is capable of producing reports that verify data in each step of process.	Yes, reports are balancing reports, load, file status, confirmation sample report, mail tracking summary, mail tracking detail, national change of address report, delivery point validation, file, invalid record, stock, and household reporting.	The City will be provided wit the following reports after processing their file. Each file will be split into 4 groups. File groupings are listed in response.
What details will be provided on your invoice?	Quantity, Per piece charge, Householding into One envelope, USPS Postage Report, Line items requested by City of Rochester.	Total page count, checksum total for specific fields, total files transmitted, total record count within each file type, total intercepts, total ACH records, total email records, any verification the City and TMT agree upon.	The data center invoices any way the customer wants. The can bill monthly, consolidate, and itemize the month's run on each invoice. Invoices will show quantity mailed, pages printed and postage amount to start with	Statement pricing, bundled statement processing, inserting cost, print suppressions, document service fee, insert printing and postage reporting detail.	The invoice can be as detailed or simple as the City would like. They can line everything or have it as one bulk cost. It will show quantity, total cost of printing, and total cost of postage.
Is contract required?	No	Yes.	No	Yes	Yes
Can you meet insurance requirements?	Yes	Yes	Yes	Yes	Yes

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Design, Printing and Distribution of the Rochester Hills	Begonia Marketing & Advertising Inc. 1075 Portion Road, Unit 20 Farmingville, NY 11738	QuestMark Information Mgmt Inc. 9440 Kirby Drive Houston, TX 77054
Firm Established:	2009	1993
Years in Business:		25
Type of Organization:	Corporation	Corporation
How many years providing Printing and Distribution Service?	Since 2011	Has been providing data processing, laser printing and delivery to USPS since 1993.
How many clients with the type of services described. Names and contact information of five.	Listed references.	Questmark provides services described in this RFP to about 90% of our current clients. List provided.
Five (5) Client references.	List provided.	List provided.
Full-time employees:	2	60
Part-time employees:	4	0
Do you provide the zip + 4 service?	Yes	Processes all data through a certified USPS presort software to CASS certify addresses and apply the IMB to conform with USPS requirements and achieve best possible <u>deliverv</u>
Is there a separate cost for the zip + service?	No	There is no additional cost.
Do you keep your certificate updated?	Yes	Certificates are updated as required.
What post office would you deliver bills to for mailing?	Rorkonkoma Post Office -New York Melville Post Office- New York	Delivers mail twice daily to the North Houston SCF.

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Can you firm comply with processing and delivery specifications? Describe how this will be met.	Yes	Able to deliver bills to USPS within 24 business hours after approval is received from City.
Firm capable of creating and printing the barcode and OCR scan line?	Yes	Questmark is able to create and print barcodes and OCR scan line.
Will your firm comply with the bank supported lockbox specs?	Left blank	Will work with the City's lockbox provider to meet specifications.
Will you subcontract any of the services?	No	No
Can your firm provide any options that would be beneficial to the process?	Yes, they can most likely discuss.	They offer additional services such as e-mailing of bills, mail tracking, SMS functionality, outbound calling and special mailing.
Describe the firm's experience with other customers or communities in the type of services described.	Orange County (Large mailing& Printing Services) TASC - Print and Mailing Island Psychiatry - Print and Mailing	Full-service and mailing facility. Experience in programming, data processing, and laser printing of all type of documents, including utility bills, statements, checks, invoices, violation notices. On-site programmers and analyst are proficient in integration, data management, and application development.

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Describe work program to deliver the printing and distribution requirements.	They will first to have to receive the addresses and data through an excel file. They then upload them to USPS for sorting and corrections. When they get the addresses back they set them up on envelopes and bills. They start the printing process. After printing the insert envelopes they prepare them for the post office trays for delivery.	Email is sent confirming receipt of the daily file. Data processing department proceeds to process the files. The job jacket is received by the print department. The print technicians stage the printers for the job. After batches are printed and checked for print quality they are sent to their letter shop for assembly. The finished count is verified against the original count.
From receipt of the City's data, explain how the City is kept updated throughout the process.	They update the addresses each time there is a new mailing through USPS website.	Upon receipt of file, an email is sent to City personnel with file name, size and time received. After file has been processed a processing report will be emailed to City personnel indicating PDFs have been uploaded for review and count of total bills with a break down of mail and no mail bills and total amount due. A final email will be sent with mail date and quantity mailed to the city.
Do you provide reports based on the data received from the City?	They provide reports that show correct addresses and quantity mailed.	Yes, they are able to provide reports to the city.
What details will be provided on your invoice?	Quantity mail.	They can provide any details of service and postage that the City requires on invoices.
Is contract required?	Yes	No
Can you meet insurance requirements?	Yes	Yes