

## SCOPE OF SERVICES

Contractor will design, print and process secured and unsecured property tax bills utilizing the County's property tax roll records and then mail the finished forms directly to taxpayers. Specifically, Contractor will produce the Secured Tax Bills scheduled for mailing in mid-October, and the Unsecured Tax Bills scheduled for mailing in mid-July.

Services shall be provided in accordance with the following:

*At all times during this process, Contractor must provide a high level of security for the County tax information and tax bills and provide evidence of production and mailing.*

1. Production includes programming services, printing of forms and envelopes, imaging of variable data, supplying of proofs, sample forms, and all requested reports. Overnight mailing of color-key forms proofs is required. Data print proofs may be provided electronically.
  - a. Major tax form proof changes may be provided in a quark file. Minor tax form changes will be provided on a mock up of the previous year tax bill.
  - b. Live and test property tax data will be provided in a file sent via ftp, in a format to be provided.
2. Contractor hereby guarantees that:
  - a. Secured tax bills shall be postmarked within ten (10) working days of receipt of the live property tax data, **but in no case shall the mailing be after October 31st.**
  - b. Unsecured tax bills shall be postmarked within ten (10) working days of receipt of the live property tax data (preferably on or before July 10th).
3. Postal processing includes NCOA processing, sorting, folding, inserting, sealing, mailing tax bills and printing of the postage reports. Postage reports will be required for each class of tax bill.
4. Contractor shall meet all postal specifications for First Class postage of forms with no surcharge for oversize forms.
5. Contractor shall provide color key and blue line proofs for each form, as well as full data print proofs after the programming and reformatting stage.
6. Contractor shall provide twenty (20) test samples of 300 D.P.I. OCR-A scan line to be tested on County equipment at Contractor's expense.
7. Contractor shall provide computer generated audit reports for each class of Tax Bill, verifying total dollar amounts and quantities. Reports shall be provided to County within two (2) working days prior to mailing the Tax Bill.

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8. Contractor shall provide the following reports in APN order within three (3) working days after mailing the Tax Bill:

a. An electronic report to include all tax bills mailed in the following format:

<b>APN</b>	<b>Bill Number</b>	<b>City</b>	<b>Zip+4</b>
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b. Two hard copy reports to include addresses matching the NCOA list in the following format:

<b>APN</b>	<b>EDC TAX ROLL ADDRESS</b>	<b>NCOA ADDRESS</b>
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9. Supply a postal expense audit report within three (3) working days after mailing the Tax Bills, in the following format detailing information such as the number of pieces that were mailed at each postage rate, i.e., carrier route, Zip+4 bar-code, 5-digit and 3-digit, basic bar-code, pre-sort, single rate, and foreign.

<b>POSTAL CLASS</b>	<b># MAILED</b>	<b>COST</b>	<b>TOTAL COST</b>
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10. Provide bar-code on outgoing mail for routing by the Post Office. Bar-code and 4-digit zip code extensions will not be included on the property tax data provided by the County. The Contractor must interpret the address information and convert to a 9-digit zip code and bar-code.

11. Provide overnight courier service of all data media, proof and reports to and from County Data Processing and production plant at no additional cost to County.

12. Seal mailing envelopes, with inserted tax bills and a bar-coded address showing through a die-cut window, and pre-sort to United States Postal Service specifications to receive the lowest one-ounce (non-surcharged) postage rate available.

*NOTE: Tax Bills shall be mailed within USPS's Western Region. This assures prompt delivery and simplifies resolution of lost or mis-mailed pieces.*

13. Cost of actual postage shall be the responsibility of the County. Contractor shall use NCOA processing to arrive at the lowest possible one-ounce non-surcharge First Class postal rate to determine County cost. Addresses from County tax roll must be used. Only the City and 4-digit zip code extension can be changed to conform to USPS standards.

a. County shall make a deposit of postage upon receipt of invoice from Contractor. The estimated payment for postage will be provided ten (10) working days prior to actual mailings.

b. Contractor will provide a postage refund check of any excess postage deposit within twenty (20) working days after tax bills are mailed.

14. Image all variable information, including an OCR-A scan line, at a minimum resolution of 300 x 300 dots per inch.

a. Image must be able to be read by the NCR Remittance Processor and the RCS Cashiering System in the County Tax Collector's office.

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- b. Testing of the OCR-A scan line from the imaged form on the County's equipment will be at Contractor's expense, and will be required prior to mailing of the tax bills.
15. County will assist the Contractor's representative in coordinating this project.

## Specifications

### SECURED TAX BILL

- a. The Secured Tax Bill shall be 8-1/2" x 14" white 28# OCR paper, printed in three PMS colors on the face and one PMS color on the back, imaged with black toner including two OCR-A scan lines on the face, with two full-width micro perforations, and "C" folded to a finished size of 8-11/2" x 3-1/2" with two folds directly on the perforation.
- b. Outgoing cello window envelope shall be 9-11/2" x 4-1/8" white 24# wove paper, printed in two PMS colors. A custom window shall be 4-11/4" wide and 1-1/2" high and placed 1311/16" from the left edge and 5/8" from the bottom edge. The custom window is required to display the name, address, Assessor's Parcel Number and bar-code information imaged on the tax bill.
- c. Return cello window envelope shall be 8-13/16" x 3-15/16" white 24# wove paper, printed in one PMS color on both face and back. Tax Collector's return address must be printed on the face of the envelope below the window. A custom window shall be 2-5/8" wide and 1" high and placed 5-5/8" from the left edge and 7/8" from the bottom edge. The custom window is required to display the return address of the Tax Collector printed on the back of the tax bill stub.
- d. The imaged and folded tax bills are inserted with two (2) return envelopes into the outgoing window envelope, sealed, postal sorted, and mail-carrier route sorted by "Zip+4" pre-bar code. "No-Mails" and "Invalids" are to be returned to the County by overnight mail.
- e. Test data proofs from test data shall be prepared, submitted to and approved by the County prior to the date of live data receipt, if necessary, as determined by the County.
- f. Secured Tax Bills shall be mailed to the property owner within ten (10) working days from the receipt of live data. During this period, live data print proofs must be prepared, submitted to and approved by the County prior to production and mailing of tax bills.
- g. A computer-generated audit report shall be prepared and mailed to the County within two (2) working days prior to mailing the Tax Bill. Informational and postage reports are to be prepared and mailed to the County within three (3) working days of tax bill mailing.
- h. The estimated volume of packages to be mailed is 110,000 packages.

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### CORTAC-LENDING INSTITUTION TAX BILL

- a. Secured Tax Bills to be sent to CORTAC-Lending institutions shall be printed on the same form as the secured tax bill. All specifications and technical requirements for the CORTAC-Lending Institution Tax Bill are the same as described for Secured Tax Bills described above.
- b. The CORTAC-Lending Institution Tax Bills shall be sorted out of the secured tax bills by the CORTAC number field, i.e. a CORTAC-Lending Institution Bill must be prepared for each record with a CORTAC number less than 9000. Records with a CORTAC number of 9000 or greater are bypassed and no bill is created. CORTAC-Lending Institution Tax Bills must be sorted in APN order and separately packaged and mailed to the institution instead of to the property owner. These bills will not require return envelopes or individual outgoing envelopes.
- c. The County shall furnish a list of code numbers and addresses of CORTAC Lending Institutions prior to printing the tax bills.
- d. The estimated volume of pieces to be mailed to CORTAC-Lending Institutions is 200 pieces.

### CORTAC-PROPERTY OWNER TAX NOTICE

- a. CORTAC-Property Owner Tax Notices are produced for all records with a CORTAC number in the CORTAC Number field.
- b. CORTAC-Property Owner Tax Notices shall be 8-1.2" x II" white 28# OCR paper, printed in three PMS colors on the face and one PMS color on the back, imaged with black toner on the face, and "C" folded to a finished size of 8-1/2" x 3-7/8".
- c. The outgoing cello window envelope shall be 9-112" x 4-1:8" white 24# wove paper, printed in two PMS colors. No return envelope is required.
- d. Imaged and folded tax notices are inserted in the outgoing window envelope, sealed, postal sorted, and mail-carrier route sorted by "Zip+4" pre-bar code. "No-mails" and "Invalids" are to be returned to the County by overnight mail.
- e. Test data proofs from test data shall be prepared, submitted to and approved by the County prior to the date of live data receipt, if necessary, as determined by the County.
- f. CORTAC-Property Owner Tax Notices shall be mailed to the property owner within ten (10) working days from the receipt of live data. During this period, live data print proofs must be prepared, submitted to and approved by the County prior to production and mailing of tax notices.
- g. A computer-generated audit report shall be prepared and mailed to the County within two (2) working days prior to mailing the Tax Bill. Informational and

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postage reports shall be prepared and mailed to the County within three (3) working days of tax bill mailing.

- h. The estimated volume of packages to be mailed is 25,000 packages.

**UNSECURED PROPERTY TAX BILL**

- a. Unsecured Property Tax Bill shall be 8-1/2" x 11" white 28# OCR paper, printed in three PMS colors on the face and one PMS color on the back, imaged with black toner including one OCR-A scan line on the face, with one full width micro perforation, and "C" folded to a finished size of 8-1/2" x 3-15/16" (with one fold directly on the perforation).
- b. Outgoing cello window envelope shall be 9-1/2" x 4-1/8" white 24# wove paper, printed in two PMS colors. A custom window shall be 4-1/4" wide and 1-1/2" high and placed 13/16" from the left edge and 5/8" from the bottom edge. The custom window is required to display the name, address, Assessor's Parcel Number and bar-code information imaged on the tax bill.
- c. Return cello window envelope shall be 8-13/16" x 3-15/16" white 24# wove paper, printed in one PMS color on both face and back. The bar-code for the Tax Collector's return address must be printed on the face of the envelope below the window. A custom window shall be 2-5/8" wide and 1" high and placed 5-5/8" from the left edge and 7/8" from the bottom edge. The custom window is required to display the return address of the Tax Collector printed on the back of the tax bill stub.
- d. The imaged and folded tax bill shall be inserted with one (1) return envelope into the outgoing window envelope, sealed, postal sorted, and mail-carrier route sorted by "Zip+4" pre-bar code. "No-mails" and "Invalids" shall be returned to the County by overnight mail.
- e. Test data proofs from test data shall be prepared, submitted to and approved by the County prior to the date of live data receipt, if necessary, as determined by the County.
- f. Unsecured Tax Bills shall be mailed within ten (10) working days from the receipt of live data. During this period, live data print proofs shall be prepared, submitted to and approved by the County prior to production and mailing of tax bills.
- g. A computer-generated audit report shall be prepared and mailed to the County within two (2) working days prior to mailing the Tax Bill. Informational and postage reports shall be prepared and mailed to the County within three (3) working days of tax bill mailing.
- h. The estimated volume of packages to be mailed is 9,000 packages.