

Appendix A

InfoSend's RFP response and pricing



An Innovative Outsourcing Partner

InfoSend is appreciative for the opportunity to present this RFP response for:

City of Ankeny
Request for Proposals
for
Printing to Mailing Services

Prepared for:

Sandy McClure
Purchasing Coordinator

Due: August 19, 2019

Time: 5:00 PM CST

Provided by:

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Cover Letter

August 19, 2019

City of Ankeny
410 West First Street
Ankeny, IA 50023

Re: Request for Proposal for Print to Mail Services

To the City of Ankeny response review committee:

InfoSend Incorporated is pleased to present this response to the City of Ankeny, IA, based on its request for proposal for Print to Mail Services, due August 19th, 2019 at 5:00 PM CST. InfoSend acknowledges the receipt of Addendum 1.

The InfoSend team is confident that our offering and benefits presented herein will provide The City and its customers with the greatest value in the market today. InfoSend has reviewed, and as a supplement to quoting services pertaining to the City's request, we have also added cost savings alternatives or made mention of added features we are able to provide for certain items.

InfoSend (FEIN: 330748516) is a privately held California corporation, incorporated in 1997, with 150 current employees delivering more than 185 million print/electronic documents across the nation per year. In addition to our CA headquarters, we own and operate production facilities in Downers Grove, Illinois and Carrollton, Texas. InfoSend's core competencies are information technology, data processing, document formatting, document production/delivery, electronic billing, and electronic payments. The Software as a Service (SaaS) approach allows InfoSend to continually refine its services and equipment without requiring software installation and maintenance at your site.

InfoSend Advantages and Differentiators

- Extensive experience with Tyler Technologies Incode data, with over 90 current client Tyler implementations.
- Wholly owned and operated out of 3 regional production facilities. We never use subcontractors to sub excess printing volume out to other vendors.
- 22+ years of expertise working with the USPS, guaranteeing the lowest cost presort and most efficient setup, never marking up postage from USPS rates.
- Excellent account management tools and personnel with continued attention to cost savings.
- No need to order preprinted stock, due to our full color duplex variable printing capabilities and customer-targeted messaging.
- Capacity to handle both high-volume and low-volume, specialized print and mailing requests with fast turn-around times.
- PCI Level 1 Compliant and SOC Type I & II Audited
- InfoSend also provides electronic billing options: Online BillPay, IVR payments, SMS payments, eLockbox bank payment consolidation, terminal payments, and payment processing – this is supported under one umbrella and pricing is available upon request.
- Specializes in supporting 500 utility clients nationwide

A Note on Materials

During RFP processes, we always like to make suggestions to optimize our potential clients' billing process when using an outsourced vendor – regardless of whether we are selected as your successful vendor. One of our strongest suggestions is encouraging the City to switch to standard outgoing and return envelopes instead of preprinted stock. Standard envelopes are produced in-house by InfoSend at a rate of millions per month, and we are able to pass our bulk rate savings on to our clients. Most importantly however, should we need to switch the City to one of our other

facilities during a disaster recovery process, your jobs will be able to be printed and mailed successfully without us having to spend additional money to stock custom materials at another one of our warehouses. Our standardized envelope setup ensures no more inventory worries or frequent cost increases for the City. InfoSend will work with the City during the bill redesign process to ensure that its logo and return address information are displayed properly to accommodate the change. Pricing included in this response is for InfoSend's standard outgoing and return envelopes.

Summary

The InfoSend solution is a complete, proven technology practice that includes print/finish/mail services, and an enhanced print and delivery process. InfoSend provides unequalled technical support, based on our proven experience and significant investment in staff and R&D roadmap. We believe that efficiencies can be improved by introducing new thoughts and ideas. We are proud to say that in 21+ years we have never had a public agency client discontinue services with InfoSend due to programming, production, quality, customer service, or operational issues. We think that makes us pretty unique in our industry. We firmly believe that entering into a partnership with the City of Ankeny will result in an efficient and cost-effective back office operation. Thank you for this opportunity to present our services.

Sincerely,



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Signature Page

SIGNATURE PAGE

The undersigned bidder, having examined these documents and having full knowledge of the conditions under which the work described herein must be performed, hereby proposes that she/he will fulfill the obligations contained herein in accordance with all instructions, terms, conditions, and specifications set forth; and that she/he will furnish all required products/services and pay all incidental costs in strict conformity with these documents, for the stated prices as payment in full.

No bidder may withdraw his or her proposal for at least ninety days after the scheduled closing time for receiving proposals.

The City of Ankeny reserves the right to reject any or all proposals, to waive informalities, and to make such awards as it shall deem to be in the best interest of the City.

Submitting Firm: InfoSend, Inc.

Address: 4240 E. La Palma Ave.

City: Anaheim State/Zip: CA, 92807

Authorized Representative (print): Russ Rezai

Title: President

Authorized Signature: _____

Date: 8/16/2019 E-mail: Attn: Kelly Law - kelly.l@infosend.com

Phone: 800-955-9330 Fax: 714-993-306

****Please include this Signature Page with your proposal****

Response to Services Required

Vendor Requirements

Contractor shall have a well-defined and consistent quality control assurance program. The program shall be explained in detail in the submitted proposal.

InfoSend's quality control process is as follows:

InfoSend Quality Control

InfoSend has been in business since 1996, with the founders starting the business on the assumption that comprehensive process controls, quality and customer service can make a difference to organizations sending critical documents. Anyone can process and output a document using standard technology, but to do it well and defect free requires well-designed technology and controls. InfoSend's strength is in its well-designed tools, procedure, people and culture that demands high volume output with over **99.99966% accuracy**.

InfoSend's document output platform and manufacturing operations have been designed using Six Sigma guidelines for engineering the solution and service. InfoSend strives to achieve stable and predictable results while continually sustaining quality improvements across the entire organization. InfoSend seeks continuous improvement of the business process using the **DMAIC** methodology:

D - Define a problem or improvement opportunity.

M - Measure process performance.

A - Analyze the process to determine the root causes of poor performance; determine whether the process can be improved or should be redesigned.

I - Improve the process by attacking root causes.

C - Control the improved process to hold the gains.

Whenever defects which are not detected and remedied as part of standard procedure, the issue is logged and escalated to a **Quality Assurance Team** which will perform **Root Cause Analysis (RCA)**, perform remediation, and present a report to Executive Management.

Quality Control for Data Processing, Print, and Mail

InfoSend's Quality Control for Data Processing, Print and Mail are designed according to the following workflow, ensuring checks and balances throughout the process to eliminate the cause of defects in client output:

- 1. Client Data Transfer, Format Integrity and Job Code Assignment**
- 2. Document Composition, Address Integrity and Sequencing**
- 3. Print Operator Checks**
- 4. Data/Print Quality Control & Staging**
- 5. Manual Fulfillment**
- 6. Bulk Mail Insertion and Checks**
- 7. Daily SLA Checks**

From the moment a client file successfully transfers, through each stage in the InfoSend system, it must pass a series of checks and milestones before it can proceed. This comprehensive process ensures the intended information reaches its recipient without error or delay.

1. Client Data Transfer and Format Integrity

InfoSend's production systems accept file submissions via secure FTP transfer, optionally with PGP or GPG file encryption, as well as via secure web upload, utilizing 256-bit or higher TLS. Partial,

duplicate or corrupt file uploads are detected, quarantined and InfoSend support personnel is notified. Once a file has successfully been transferred it is put through the following checks. If exceptions are found the client output is halted and personnel is notified to review and escalate as necessary:

File Level Validation and Job Code Assignment

- Verify file by naming convention or source to assign client value or file will halt.
- (Optional) Verify file is unique with MD5 hash check comparison to previous files or file will halt.
- If the document output is comprised of multiple input files, validation is run to ensure all supplemental files are present or file will halt.
- Once file level validation is complete, a unique InfoSend Job Code ID is created.

File Content Validation and Analysis

- A client document specific parsing program is run to validate the file format.
- All contents must adhere to known client specification or file will halt.
- A record count is generated and supplied to the client in advance of document composition.
- The data is scanned and all date values must be within a client defined threshold or the file will halt.
- Optionally, client-specific checks at the data level are defined and provided by InfoSend. For example, documents over a certain dollar value can cause a file to halt.

2. Document Composition, Address Integrity and Sequencing

InfoSend leverages various software techniques to ensure the document output can interface with internal printing, inserting and quality checks in addition to United States Postal Service (USPS) standards and equipment.

Document Composition

- Client data is transformed into a document batch.
- Records are optionally suppressed from printing according to client criteria.
- All documents will be marked with the InfoSend Job Code.
- Document layout designed to meet client specification, as well InfoSend QC and USPS requirements.
- Data validation checks are performed to ensure that specific criteria are being met (e.g., that the number of pages in the outputs is consistent with the number of records in the data)
- InfoSend also works with clients to integrate additional data validation checks, upon request

USPS Standards, Presorting, and Address Validation

- All addresses are put through CASS certified address validation to add a 4-digit extension to the Zip Code.
- USPS OneCode Intelligent Mail Barcode is created and added to the address block, digitally presorting the addresses, allowing the USPS to optimize and improve the accuracy of the mailpiece delivery.
- Optionally, InfoSend can apply the Move Update options or NCOALink, ensuring the accuracy of delivery.
- Tracing of individual mail pieces after they have been picked up by the USPS for processing and delivery.

Document Grouping and Sequencing

- All records are scanned for the destination. Documents destined for the same recipient and address are grouped as a single mail piece.
- All mail pieces are assigned a unique control number.
- All mail pieces are given a 2D barcode that corresponds to the control number allowing select equipment in the InfoSend system to perform sequencing and validation.

- All mail pieces are given optical mark reading line (OMR) hash marks to instruct envelope insertion equipment.
- All mail pieces that cannot be presorted (e.g. address does not validate, international mail, number of pages will not fit in a standard envelope) are separated (when necessary) for special handling.

3. Print Operator Checks

InfoSend provides print operators with in-depth Quality Control training. When jobs are processed, InfoSend creates a Job Ticket that is attached to each job. Batches are given unique job codes that are reflected on each Job Ticket. In addition to printing specifications, Job Tickets also reflect materials specifications including paper and envelope type as well as any inserts that are required.

In addition to the Job Ticket the printing department has a quality checklist that requires the following checks to be performed:

Pre-Print Check

- Verify Job Ticket, retrieve necessary paper stock.
- Verify printing equipment used. Check for insertion of correct paper type.
- Check for printing OMR hash marks, check printing type.

First 100 Sheets Check

- Fan first 100 for quality/issue alignment; then every 10,000 pages after that.
- Check for deletion and other defects.
- Verify that job code on Job Ticket matches code on printed statements.

Primary Checks

- Fan job – look for quality issues/alignment
- Check hash mark alignment
- Verify counts
- Check to see if printer jams occurred. If so, verify sequence and log control number of jams. When printer resumes make sure the control continues with the correct sequence.
- Upon completion of printing remove stock from the printer and put it away in the designated location

Secondary Checks

- Check sheets at end of the job for any printer issues.
- Check to ensure the job was printed on the correct form with the correct orientation
- Check to ensure the insert list match the Job Ticket
- Primary and Secondary Sign-offs, then transfer the job to the Data and Print Quality Control Department.

4. Data/Print Quality Control & Staging

After a file has been printed it is taken directly to InfoSend's Quality Control (QC) department. The Quality Control Representative (QCR) performing print quality control will perform many of the same QC that the print operator performs on the output and materials, providing a second layer of redundancy to reduce the risk of single operator error.

In addition to this data quality, checks can be performed. InfoSend has a custom, proprietary QC software program that asks the QCR operator a series of questions to validate the accuracy of printed data. The program randomly selects documents from the client data and requests that the operator find the document based on the control number and validate that the printed output reflects the expected values (example: printed Amount Due must match an expected value). This application can be used to help catch issues with client data. For example, clients can ask InfoSend to check for specific data issues after a new job goes live. InfoSend can act as a second line of defense for the client in case a data issue was missed before uploading the file.

If there is an error in the file, the QCR will pull the individual statement (or the entire file, if needed) and resolve the issue, before the printed documents are allowed to proceed. If there are any types of errors within the file that would cause a mailing delay, InfoSend will contact the Client's representative immediately for approval.

The QCR team will also stage the job for mailing based on the job's due date. The mailing team is only allowed to retrieve batches once they have been checked by the QCR team and placed in designated areas for mailing. This ensures that jobs are not inserted until quality checks have been completed and batches have been staged for production.

5. Manual Fulfillment

Unfortunately, not all mail pieces can be inserted by machine. There are a few different reasons why some mailpieces must be inserted by hand:

- The batch or batch subset has less than 5 mail pieces. Setting up very small sets of mail pieces to run on the mail inserter is inefficient/problematic. Mailing machines are designed for bulk mail processing. It takes time to physically prepare a machine to run the next job. In addition to this, it takes time to enter jobs into the system and every machine-inserted job must have supervisor sign-off before the inserting starts and when it has completed (this is explained later). For this reason, it is necessary to hand insert these small jobs or job subsets using the increased safety measures than it is to machine insert them.
- Mail piece contains too many pages to be machine inserted (applies only to multiple page statements). There is a physical limitation to how many pages a machine can reliably fold and insert into a #10 envelope.
- The recipient's address is foreign. InfoSend staff must look at each foreign address to determine what the applicable postage rate is. Clients do not always enter foreign addresses correctly. Since different postage rates can apply based on where the mail piece is going and country names can be misspelled InfoSend staff must sort through the foreign addresses to determine the applicable postage rate. Most batches of mail contain less than 5 foreign statements that are going out at the same postage rate, which makes machine-inserting inefficient/problematic.
- The recipient's address is located in the US but entered incorrectly. Clients do not always enter domestic addresses correctly. When address data is entered incorrectly (typos, missing fields, etc.) it can cause the addresses to fail CASS/DPV checking & standardizing. CASS & DPV is the automated process that checks addresses against a USPS database to find a direct match and create the Intelligent Mail Barcode. Most clients have the non-verified addresses suppressed from printing but some clients require that these records be printed and mailed. Some batches contain a small number of these residual pieces. If the subset contains less than 5 pages it is hand inserted.

To increase the safety of performing manual fulfillment InfoSend uses a 3-person process for all healthcare and finance documents:

- All batches or subsets of with less than 5 mail pieces must be inserted by hand by employees trained to process mail by hand. These jobs should never be released to mailing operations where a machine operator may attempt to hand insert the piece or run it on the machine without following established quality control measures for machine operations.
 - All hand-inserted mailpieces must be logged on the back of the blue Job Ticket.
 - Counts for completed pieces need to be verified by a second individual who will initial the Job Ticket in the "Additional Processing Information" section of the Job Ticket. No manually inserted jobs or subsets of jobs should be released without having the counts verified.
1. Step 1: The first person separates the mail pieces by turning the individual mail pieces on the stack to create separation (each mail piece is turned 180 degrees and placed on the last one).
 2. Step 2: The second person inserts the mail pieces into the correct envelope.

3. Step 3: A third individual verifies the counts against the Job Ticket. At each step in the process, the responsible party needs to sign off on the back of the flat/multiple Job Ticket to log that this step was done.

6. Bulk Mail Insertion and Checks

Below is an overview of InfoSend's Quality Control checklist used for its bulk mail inserting and mail operations department. It is at this stage that the 2D barcode sequencing and OMR lines are leveraged to ensure the accuracy of the mail pieces prior to delivery to the USPS.

Pre-Mailing

All jobs or subsets of jobs that have at least 5 mail pieces are inserted by machine with no exceptions. And every job that is run on the inserters must be run using the mail piece integrity software solution to prevent inserting mistakes. The specific product we use is called Document Reliability System, or DRS. All jobs run by machine require sign-off before the job can start and after it is completed to ensure that DRS was used and all counts are correct.

- The operator must receive supervisor sign-off before a job is started. The supervisor verifies that the envelopes are correct, the machine and postage meter counts have been reset, the postage rate on the meter is correct and that the DRS system is on.
- Check that all envelopes and inserts have been removed from inserter equipment
- Verify correct inserts
- Verify that jobs will be processed using DRS. Inserter has a computer system that uses 2D barcode technology to perform real-time quality control by scanning the mail pieces before they are folded and after they are inserted into the outgoing envelope.

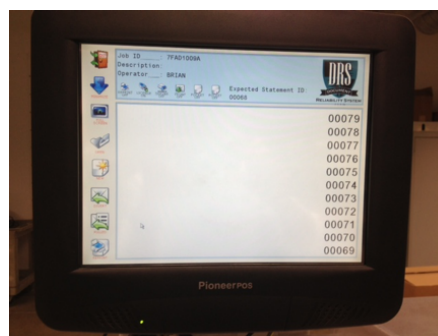
Mailing

- Inserter keeps a running count of the number of pieces mailed
- Inserter will halt if 2D cameras discover a document that is out of sequence. This accomplishes two things:
 - Detection of multiple pages being incorrectly inserted into the same outgoing envelope. For example, if the machine incorrectly inserts two statements into the same envelope then the machine will stop and an out of sequence error will display on the DRS screen.
 - Detection of a missing page
- Images of the Document Reliability System key components:

2D Barcode Scanner



Document Reliability System Monitor



Additional Information on how the Document Reliability System works:

Printing

Each document is tagged with a unique 2D barcode to the address block. This allows each document to be individually identified.

Scanning

A scanner checks every document as they are inserted. The envelope window is scanned and the documents are reconciled in real time with the original document print stream database.

Reconciling

The DRS monitor provides real-time alerts for any out-of-sequence, missing, duplicate, misread or invalid document discrepancies during production.

- The machine operator must signal a supervisor every single time there is an out of sequence error and receive sign-off on the resolution.

Post – Mailing (job has been completed)

- The supervisor verifies that the number of mail pieces inserted matches the number of mail pieces listed on the Job Ticket. If the number of mail pieces inserted does not match the Job Ticket then the batch is put on hold for investigation. The batch is not mailed until the reason for the incorrect count is discovered and corrected. This may include reprinting any missing or damaged documents. All of the following counts are matched against the Job Ticket count:
 - Computer system (2D) count
 - Mechanical folding system count
 - Mechanical inserting system count
- Remove materials from inserter and put away in the designated location.
- When a job is complete the operator must receive supervisor sign-off before resetting the machine counts and setting up the next job. The supervisor inspects the counts and matches them against the Job Ticket and inspects the DRS system to ensure that it was used for the entire job. The supervisor also checks the DRS statistics to ensure that 100% of the mail pieces were accounted for. If less than 100% of the mail pieces were detected by DRS then the supervisor must ensure there is a valid reason for the missing piece or pieces, such as a documented request from the client to pull a printed statement from the batch.
- Remove Job Ticket and place in the queue to be scanned. Each Job Ticket contains a specialized barcode. This barcode is scanned by a PC that runs the specialized application required to close out jobs in the system. The Job Ticket is only scanned if the job is completed before the USPS cutoff for that day. If the batch is completed after this cutoff then the Job Ticket is held and scanned the morning of the next business day. This ensures that the system reports the correct mailing date. (Note: in some cases, the Job Ticket is not scanned on time. We are currently researching this issue and looking for ways to reduce the lag from when the Job Ticket should be scanned to when our team notices that it was not scanned).
- Automated detection of jobs being run without DRS. It is not physically possible to prevent machine operators from running an inserter without DRS. However, we do have an automated process to check DRS every time a job has been completed to ensure DRS was used for it. If DRS was not used for that specific job then a warning email is sent to management to trigger an investigation. There is ample time to investigate these warnings, as completed jobs are not immediately trucked to the USPS. They are placed in a holding area where postal employees verify and approve the jobs before they can be sent to a postal processing facility for delivery.

7. Daily SLA Checks

An automated report is emailed to support staff multiple times per day. It contains a list of batches that are suspected of not meeting the SLA for completion. Support staff investigates these jobs to determine if they truly were mailed late and if so why. Any jobs that were mailed on time but did not have the Job Ticket scanned on time are completed in the system ASAP.

Contractor shall provide a single contact or dedicated client service specialist.

InfoSend's Key Support Personnel

InfoSend's mission to provide the industry-best support requires excellence and attention to detail within the Client Services (CS) department. InfoSend has designed support around extensive procedural controls to ensure client output is handled accurately and issues are addressed expeditiously. If InfoSend is awarded the Water Authority's contract, we will at that point assign a dedicated Account Manager to work with the Authority on the implementation project. This Account Manager will remain the Authority's main point of contact throughout the implementation and will also be available after go-live for ongoing maintenance or improvement projects.

Executive Management and Sales:

InfoSend designated Contract Administrator: Russ Rezai, President

InfoSend designated Contract Manager: Matt Schmidt, COO

InfoSend sales contact: Kelly Law, Territory Sales Manager and Robert Crawford, Territory Sales Manager

Delivery Team:

- **Executive Management and Sales Team:** will serve as the City's main contact for RFP questions and contract negotiations.
- **Client Services Team:** manage ongoing processing, and will be main points of contact during the new client implementation process. Primary and secondary Client Services contacts will be assigned during the contracting phase if InfoSend is selected as the successful vendor. These contacts will report directly to Matt Schmidt, COO and Josue Martinez, Director of Client Services.
- **IT team:** will provide back-end support for the City's jobs. IT works in conjunction with InfoSend Client Services during any improvement projects and actively monitors program functions after go-live. IT personnel report to Vedat Aral, Director of IT.

Contractor will serve as resource expert for complex U.S. Postal Service regulations.

InfoSend accepts this requirement. As USPS requirements, customer behaviors and client needs evolve, InfoSend will enhance the service offering. InfoSend's dedicated research and development staff stay ahead of the USPS changes and mandates, maintaining close contact with USPS representatives to ensure compliance. In addition, InfoSend's development staff meets routinely to discuss upcoming USPS enhancements, scheduling development far in advance to ensure a seamless transition for clients. Should any USPS changes, such as rate increases, require client awareness, InfoSend's Client Services department sends email notifications to clients and closely coordinates changes to output to minimize impact.

The City of Ankeny utility billing information is considered privileged and confidential. At no time will any City of Ankeny customer information be allowed to be viewed, distributed, relayed, or provided in any manner to any third party agency or representative without the expressed written permission of the City's Representative.

InfoSend accepts this requirement. The City's customer information will not be distributed at any time without the City's consent.

Lead Times Needed

Proposal shall indicate the minimum lead-time needed to receive billing information and inserts in order to meet mailing dates. This may also take the form of turn-around time, stating that mailing will be delivered to the U.S. Postal Service within certain amount of time after receiving information. Lead-time information shall be inclusive of any/all insert materials. The City anticipates requiring less than one day for proofing.

InfoSend's turnaround time, from receipt of file with pre-set cut-off times, is next business day. This is a standard part of our workflow. Insert materials accompanying the City's bills is preferred to be received 48 to 72 hours before the start date for the insert run.

Drop-Shipped (Client Produced) Inserts

Drop-shipped inserts are inserts that are delivered to InfoSend ready for mailing (i.e., professionally cut and/or pre-folded). Please refer to the following specifications InfoSend has set for the acceptance and successful insertion of drop-shipped inserts into document runs:

- **Insert Sample Test:** The Insert stock must be able to run through our mail processing equipment. If your insert is a unique size or paper stock, please send a sample to InfoSend for testing and approval prior to the start date for the insert run.
- **Signed Quote:** a signed quote form must be included with the box(es) of inserts.
- **Professional Cut:** Drop-shipped inserts must be professionally cut and/or folded to ensure proper insertion. Inserts that are hand cut or inconsistent in size will incur additional fees or may be rejected.
- **Proper Shipping and Handling:** It is the client's responsibility to ship the inserts properly. Damaged inserts cannot be used.

Instructions for Sending Drop Shipped Inserts to InfoSend:

- **Timeline:** If your organization receives same-day mailing service from InfoSend, then our warehouse must receive your printed inserts at least **24 hours prior to your mailing**. InfoSend prefers to receive all inserts 48 to 72 hours in advance of the start date for the insert run.
- **Shipping Instructions:** Please make sure that each package of inserts is labeled with your company/organization name, to simplify matching them with your insert instructions. The quote form should also be included with the box(es) of inserts to simplify this process.

Materials and Equipment

Proposer shall provide a sample of other billings of a similar nature currently being provided to other customers. Include samples of the proposed paper stock perforated and folded, #10 double window security envelopes and #9 reply security envelopes.

InfoSend has provided a separate folder containing samples.

Proposals should include any certifications or otherwise be able to demonstrate compliance with the requirements of Section 2, Sub-Section 7, relating to the U.S. Postal Service, with particular emphasis on minimizing postage costs.

InfoSend passes on all USPS discounts to our clients and never mark postage up. Postage is the most expensive component of mailed document production, a very important cost consideration when selecting a document production partner as not all vendors provide the lowest cost-saving discounts available. The current lowest available **First-Class rate in 2019 is \$0.38 per piece**, which includes all full-service discounts.

InfoSend utilizes the following methods to ensure clients are mailing with optimal efficiency.

Full Service with Intelligent Mail Barcode (IMb)

In 2009 the USPS introduced the cost-saving Full-Service mailing option using the Full-Service Intelligent Mail barcode. The Full-Service option provides a number of benefits for qualifying mail pieces. One of the most significant is a postage discount of \$0.003 on each qualifying mail piece below the normal lowest pre-sort 5-digit postage rate. In 2019 the lowest 5-digit presort rate is \$0.383, meaning our Full-Service discount is \$0.38 per piece. InfoSend, by default, will implement the Full-Service Intelligent Mail barcode within client documents produced, and will pass the discount directly to the Village.

Coding Accuracy Support System (CASS)

InfoSend processes each client file through United States Postal Service (USPS) certified and approved software to ensure the Coding Accuracy Support System (CASS) routine is run. The CASS system improves the accuracy of carrier route, 5-digit ZIP, ZIP + 4, performing Delivery Point Validation (DPV) on mail pieces, and digitally presorts the order of mail for USPS efficiency. Utilizing

CASS certification allows InfoSend to obtain the maximum presort postage discounts for client mailings.

USPS Move Updates

InfoSend ensures that clients comply with the USPS Move Update requirements. Mailers must use a USPS approved method to keep client customer address database up to date to qualify for presort discounts. Per USPS requirements clients must update the addresses in the database using the information that is reported back by the USPS. Failure to update addresses within the USPS's deadline will result in the loss of presort postage discounts.

InfoSend offers two move update services that are compliant with the USPS:

1. **Address Change Service (ACS):** when this option is selected the USPS forwards client mail to the new address and records the action in their database. InfoSend retrieves this information weekly and sends clients an electronic report of the forwards.
2. **NCOALink Service:** with this option InfoSend uses the NCOALink database to find the new addresses during data processing. The new addresses can be printed on documents before they are mailed, or printed as-is and forwarded to the new address by the USPS.

In either scenario, clients receive electronic reports of the new addresses after each batch is mailed. If a client elects to have the USPS forward the mail, the addresses must be updated within 90 days.

Detached Mailing Unit (DMU)

InfoSend's Anaheim headquarters and Downers Grove facilities are designated as a USPS Detached Mail Unit (DMU). Having DMU status means that outbound first-class mail is inspected by USPS employees located at the production facility, removing the need for mail to be inspected after delivery to the USPS. Mail that is presorted at InfoSend's facility is directly entered into the postal distribution system, expediting mail delivery times and increasing the volume of mail InfoSend can induct daily while reducing overhead.

Ongoing USPS Enhancements

As USPS requirements, customer behaviors and client needs evolve, InfoSend will enhance the service offering. InfoSend's dedicated research and development staff stay ahead of the USPS changes and mandates, maintaining close contact with USPS representatives to ensure compliance. In addition, InfoSend's development staff meets routinely to discuss upcoming USPS enhancements, scheduling development far in advance to ensure a seamless transition for clients. Should any USPS changes, such as rate increases, require client awareness, InfoSend's Client Services department sends email notifications to clients and closely coordinates changes to output to minimize impact.

Paper stock to be furnished by Contractor, after approval by the City's representative.

InfoSend accepts this requirement.

Paper will be 8.5" x 11", 24 lb. perforated white stock/tri-fold.

InfoSend meets the City's paper requirement. Documents are printed onto white 24lb paper stock. Any bill or letter that requires a tear-off remittance stub will include a micro perforation for a clean and smooth edge (lockbox compatible).

Perforations are to be in size and manner necessary to facilitate return mailing in envelope.

InfoSend meets this requirement. Customized perforations and multiple perforation locations are supported.

All envelopes are to be furnished by the Contractor.

InfoSend meets the City's envelope requirement. Unlike other vendors, standard envelopes are produced in-house by InfoSend at a rate of millions per month, and we are able to pass our bulk rate savings on to our clients. Most importantly however, should we need to switch the City to one of our other facilities during a disaster recovery process, your jobs will be able to be printed and mailed successfully without us having to spend additional money to stock custom materials at another one of our warehouses.

Mailing envelopes shall be #10 double window envelopes. Paper should be minimum 20 lb. stock, white, as approved by the City's representative.

InfoSend meets the City's #10 envelope specifications.

InfoSend's Standard #10 Envelope Specifications:

#10:

Envelope Part #: ENV-INF-#10

Style: Side Seam

20# Paper

Size: 4-1/8 X 9-1/2

Win 1: 1-1/8 X 3-7/8 Left: 3/8 Bottom: 2 9/16

Win 2: 1-3/8 X 4-3/8 Left: 3/8 Bottom: 9/16

Print 1/1 (Black/gray)

Poly Window Film

Reply envelopes shall be #9 business envelopes. Paper should be minimum 20 lb. stock, white, as approved by the City's representative.

InfoSend meets the City's #9 envelope specifications.

#9:

Envelope Part #: ENV-INF-#09

Style: Side Seam

20# Paper

Size: 3 7/8" x 8 7/8"

Win 1: 1 1/4" x 4" Left: 4 1/2" Bottom: 1/2"

Print 1/1 (Black/gray)

Poly window film

Technological Requirements

Proposer should explain in detail how they would establish the links between the City's software and their own software in order to facilitate billing data transfer and acknowledgement.

A key component InfoSend's Customer Communications Management (CCM) platform is the full web administration provided to clients on www.infosend.com. The InfoSend website allows clients on a 24/7 basis to upload, view, approve, control messaging on output, as well as interact with InfoSend Client Services. InfoSend's website does not require clients install any software beyond a modern web browser (Chrome, Firefox, Internet Explorer, Safari, etc.). The solution utilizes the latest encryption technology required to ensure communications are unable to be intercepted or accidentally exposed. All sessions occur over HTTPS with TLS encryption, and each client user must be uniquely registered to an email address by an Administrator.

InfoSend.com Web Administration Highlights

- **Secure SaaS Cloud Solution:** secure, hosted, infosend.com website allows clients to administer their InfoSend applications, as well as user roles and permissions from any modern web browser 24/7.
- **File Submission and Job Tracking:** providing transparency into each file received as it progresses through data processing and manufacturing by InfoSend. Also allows clients to securely upload files via the web.
- **Sample Approval:** optional workflow, allowing clients to view output and approve prior to manufacturing and distribution.
- **Message Manager:** allows clients to self-administer ad-hoc and scheduled messaging on customer-facing output.
- **Insert Management:** allows clients to request additional materials be included with output, such as flyers, buck slips, newsletters etc.
- **Print Image Archive and Mail Tracking:** allows clients to view images of each document produced, reprint or email the document, as well as view USPS delivery tracking information for qualified documents.
- **Support Tracking:** allows clients to open tickets and securely communicate with InfoSend staff on change requests or issues.
- **Reporting:** reports on the details of each client Job are posted to the website for secure viewing and download.

The software currently used is Incode, version 9, by Tyler Technologies.

InfoSend has many years of experience working with Tyler Technologies Incode data, with over 90 current Tyler client implementations.

The Contractor should have the ability to manipulate data provided by the City. Data files are in XML file format but can be provided in csv. delimited file format

InfoSend meets this requirement. InfoSend's Data Processing platform is completely adaptable to client output, accepting both data-only text files (e.g. flat files, csv, XML, etc.) and print-output PDF files.

The Contractor shall provide the City access to the City's records and retain billing data. This should include the ability to produce duplicate bills.

The Print Image Archive is an optional service. This is a document archiving tool used by your customer service representatives to download PDF copies of any document that InfoSend mails. You can also choose to have InfoSend store paperless documents in the archive to give you one central location to view all paper and electronic bills. Your support representatives can use this service to research customer inquiries by viewing an exact copy of the printed bill.

This service can be used to reproduce exact copies of your printed bills. A screenshot of the application's search form is included below. You can pick up to 3 custom fields to index. For example, the "Bill Date", "Due Date", and "Service Address" fields in the image below were added to the search form and mapped to the custom data file format for a utility client of ours.

415493 Total Record(s)
PLEASE ENTER SEARCH CRITERIA BELOW TO DISPLAY RECORDS

Name:

Account Number:

Job Code:

Bill Date:

Due Date:

Service Address:

Received Date (MM-DD-YY): - - To - -

SPCL Status:

If you purchase the Print Image Archive service, then you will automatically get mail tracking at no additional cost! Mail tracking data will be accessible via the Print Image Archive interface. InfoSend stores the Intelligent Mail Barcode tracing information supplied by the USPS. The USPS scans the barcode as the mail moves through their system. You can use the tracking information to verify that individual bills were mailed and see the timestamps provided by the USPS. *Only available with mail sent using 1st Class Postage, and not available in some cases with postcard mailings.*

Should you purchase the Print Image Archive service then there is no additional service charge from InfoSend to give third party applications access to the archive. You only pay one per PDF archive fee and can access it from the search screen on the InfoSend management portal and let other applications access the documents by integrating with InfoSend's secure API (application program interface). Setup fees may apply depending on your configuration needs.

Production

Image quality will be of high standards. A sample should be included with proposal documents.

InfoSend meets this requirement. Documents are either printed using high-speed production laser printers or production full color inkjet printing.

The Contractor should have the ability to send multiple statements in a single envelope with one return envelope, if needed, to the same customer and mailing address. Estimated quantity of this type is less than 1% of all bills.

InfoSend has default workflow to "household" into one envelope all statements destined for one mailing address. Householding reduces both the number of envelopes and inserts that are used. Multiple bills to the same customer and mailing address will be matched and inserted in one appropriate size envelope and metered first-class separately, and delivered to the USPS at the same time as all other bills are delivered. In addition, InfoSend only charges clients for actual counts

of envelopes used. When multiple bills are household into the same envelope, the Village will only be charged for envelope materials used – **this sets InfoSend apart from our competitors.**

The Contractor should have the ability to exclude #9 business reply envelopes from statements mailed to customers coded as bank draft customers.

InfoSend supports the ability to suppress inserting envelopes based on City criteria. Selective Inserting will allow clients to exclude a #9 return envelope for all customers with credit balance bills, zero balance bills, or AutoPay customers.

The Contractor should utilize CASS Certification and NCOA link processing on all mailings.

All USPS automation, CASS, presort and IMB application is performed by InfoSend and the City will pay pass through postage costs only, including all available discounts.

The Contractor shall update the City's data files with customer Z.I.P. + 4 bar coding.

InfoSend meets this requirement.

Invoicing and Reporting


Proposer shall explain how they would provide weekly or monthly itemized invoices.

InfoSend has devised a client-friendly workflow for producing invoices in a reliable, timely and transparent manner. All data for InfoSend's invoicing is driven by the data processing engine, with accurate software and operational controls to ensure counts are reconciled throughout the process.

InfoSend is capable of providing invoices in formats that fit the needs of the client accounts payable for reconciliation. Invoices can be provided via mail, electronically, as well as on a weekly, bi-monthly or monthly schedule.

A standard client invoice will be provided with an invoice number for reference and includes details of each job batch and output performed by InfoSend that resulted in billable items.

For clients that would prefer to work with the invoice data for additional levels of reconciliation, InfoSend also provides a Process Detail Report for all billable items in a CSV format that may be loaded into Excel. This report for the invoice allows clients to group, sum and analyze the itemized billable elements, from documents to postage, as required for their process.

	A	B	C	D	E	F	G	H	I
1	Job Code	Client ID	Cycle ID	Item Description	Pages	Qty	Rate	Total	
2	INF0617A	513	6766	Additional Dynamic Color Printing fee per page	1	139		1	139
3	INF0617A	513	6766	NCOA Address Change Service	1	10		1	10
4	INF0617A	513	6766	Statement Data Processing/Printing/Mailing Service Fee	1	139		1	139
5	INF0617A	513	9313	Additional Dynamic Color Printing fee per page	1	38		1	38
6	INF0617A	513	9313	NCOA Address Change Service	1	2		1	2
7	INF0617A	513	9313	Statement Data Processing/Printing/Mailing Service Fee	1	38		1	38
8	INF0617A	513	11090	Additional Dynamic Color Printing fee per page	1	52		1	52
9	INF0617A	513	11090	NCOA Address Change Service	1	2		1	2
10	INF0617A	513	11090	Statement Data Processing/Printing/Mailing Service Fee	1	52		1	52
11	INF0617A	513	11102	Additional Dynamic Color Printing fee per page	1	103		1	103
12	INF0617A	513	11102	DPV Failed/Suppressed	1	1		1	1
13	INF0617A	513	11102	NCOA Address Change Service	1	9		1	9
14	INF0617A	513	11102	Statement Data Processing/Printing/Mailing Service Fee	1	103		1	103
15	INF0617A	513	11133	Additional Dynamic Color Printing fee per page	1	87		1	87
16	INF0617A	513	11133	NCOA Address Change Service	1	1		1	1

All invoices shall be sent to City of Ankeny, Attention: Finance Department, 410 West First Street, Ankeny, Iowa 50023.

InfoSend acknowledges the above and will comply should InfoSend be the awarded bidder.

Payments are made on the first and third Monday of every month. Original invoices will be processed for payment within thirty (30) days upon receipt and after all services have been satisfactorily performed. The City encourages the use of electronic funds transfer (EFT) for vendor payments.

InfoSend acknowledges the City's schedule and will comply if InfoSend is the awarded bidder.

The Contractor shall provide a billing activity report for each billing cycle to include the number of bills mailed, the dates of the mailings and the amount paid in postage. These reports shall be included with each invoice and shall also be available electronically.

InfoSend's Customer Communications Management (CCM) platform provides clients with the necessary reports to reconcile and receive updates throughout the Data Processing, Print, and Mail (DPPM) process. InfoSend standard reporting workflow is provided by default, and is able to provide certain reports in a variety of methods including text files, comma delimited files, HTML formatted reports, and in some cases PDFs.

All reports are available either through the InfoSend website and can also be emailed or transmitted via secure FTP. In addition, clients have the capability of assigning internal contacts that have permissions to access/receive reports.

Data Processing, Print and Mail Reporting Highlights

- **File Transmission and Processing:** InfoSend provides key reports during file transmission, after data processing, and upon file completion so clients are informed throughout the entire process.
- **Process and Postage Summary:** for clients utilizing the Sample Approval workflow, a Process Summary report is presented with details on the work to be performed, along with an estimate of postage.
- **Job Tracking Tool:** as client batches are processed, InfoSend provides a web tool with real-time and historical information when a file has achieved a stage of production.

- **Address Update:** InfoSend provides a full suite of address updates, including National Change of Address (NCOA) reports.
-

InfoSend's Process Confirmation Report

The Process Confirmation Report is emailed to designated client staff members as well as posted to the reports section of the web portal after documents have been completed for mailing and released to the USPS. This report provides confirmation that InfoSend has released a job's mail pieces to the USPS for mailing. This report provides the name of the file(s) mailed along with a detailed mail count. For statements, invoices, and other financial documents, the total dollar amount is also provided. Additional information can be provided after the "totals" section of the report. For example – addresses that could not be verified for delivery point validation can be listed at the end of this report. The Process Confirmation Report can be created in one of three different formats: plain text, XML, or HTML.

Billing activity report information should be available for retrieval by the City for a period of twelve months.

InfoSend meets the City's archiving requirement of 12 months.

Security Issues

Proposer shall describe provisions for maintaining utility account data security.

InfoSend Security Procedures

InfoSend's Customer Communications Management (CCM) platform is responsible for processing and distributing consumer communications. As such, physical infrastructure, data and computing environment security and safety are paramount to protecting consumer information on behalf of clients. InfoSend's systems, security processes, and practices are currently subject to the rules and regulations of multiple laws and/or audit types:

- Payment Card Industry Data Security Standard (**PCI DSS**)
- Health Insurance Portability and Accountability Act (**HIPAA**)
- Statement on Standards for Attestation Engagements (**SSAE 16**)
- Gramm-Leach-Bliley Act (**GLBA**)
- Fair and Accurate Credit Transactions Act of 2003 (**FACTA**)

InfoSend approaches the risk of data breach via the following methodologies:

1. **All Facility Physical Premises Secured:** all InfoSend facilities are locked and protected at all times, with access requiring security authorization by InfoSend. InfoSend employees have issued I.D. cards that must be worn at all times. Guests are strictly monitored and chaperoned.
2. **Secure Encrypted Data Storage Practices:** all data files can be PGP encrypted during transfer, and all web traffic utilizes HTTPS, ensuring secure communications both ways. Data is stored with both encryptions at rest and extensive compensating controls.
3. **Secure Segmentation and Disposal of Client Data:** data is segmented between each InfoSend customer to ensure no commingling or erroneous joining can occur. All programs and workflows are custom-tailored to the client, ensuring program failure and employee notification in the event data is somehow manually entered into a workflow.
4. **Secure Disposal of Client Data:** All client data, whether digital or printed is disposed of securely with degaussing and shredding required.
5. **Firewalls and Web Application Security:** InfoSend limits traffic to and from each facility to business essentials, and employs numerous technologies to detect and thwart intrusion attempts. InfoSend regularly undergoes penetration tests with outside vendors.

6. **Background Checks and Drug Tests for All New Employees:** all InfoSend employee identities are verified and checked for criminal history before acceptance. In addition, employees are administered and must pass a drug test before hiring.
7. **Annual Security Policy and Awareness Training for Employees:** all InfoSend employees are given training on security procedures and risks at least annually, ensuring awareness and compliance.
8. **Formal Suspected Breach Escalation, Review and Notification Process:** all employees are trained to report and escalate suspected breaches or breach attempts to their manager immediately. If client data was at risk, and the breach is not ruled out after a second internal review, then the client is notified and InfoSend pledges full cooperation during the further investigation.

Physical Security Details

InfoSend facilities employ physical site security measures such as zoned and controlled access, cameras, alarms and other theft deterrents. In addition, InfoSend ensures that only approved personnel handle client information and materials. Buildings are locked at all times with approved personnel access controlled by key cards. All visitors are required to sign a visitor log, wear a visitor badge and will be escorted while in the building. Additionally, InfoSend maintains a West Coast Headquarters and a Midwest facility for business continuity, as well as to support the growing needs of our customers. These production facilities are located in Anaheim, CA, Downers Grove, IL, and Carrollton, TX. Each facility operates with mirrored processes and compatible equipment. InfoSend has a tested disaster recovery plan and a secure off-site data center.

Systems Hardening

InfoSend performs the following systems hardening functions:

- System-wide security policies protect data from internal and external threats
- New users must change system-generated passwords upon the first login
- Real-time HTTP and HTTPS application layer security inspection
- Require special characters and minimum length security passwords
- Require password changes every 3 months
- Vendor-supplied default or guest accounts are protected or deleted
- Start-up passwords must be created in a manner that is not predictable
- Anti-virus definitions are updated automatically as they become available to protect client data from viruses, Trojan horses, worms, etc.
- Anti-virus software is installed on each Windows PC, and on the corporate mail server
- Process hardening through use of SELinux
- Live log analysis and file integrity scanning
- Install and maintain the most recent service packs
- Monitor security rollout packages, install patches as needed
- Remove unnecessary applications
- Remove unnecessary services and default settings
- Monitor security rollout packages, install patches as needed

Continuous Improvement

In an effort to continue core operations and provide the excellent support our clients rely on, InfoSend understands the importance of continued improvement of our security practices. Security is at the forefront of this improvement process. Through our extensive research and proactive measures, InfoSend clients can be assured that their data is protected and handled with the highest industry-standard measures of care.

Company Information

List general company information, including name, address, telephone number and total number of years in business.

InfoSend was founded in 1996 and incorporated on January 17, 1997 in the state of California and has provided similar services in scope and size for 23 years. InfoSend is located strategically across the nation, ensuring both disaster mitigation and regional access to the USPS.

Corporate Headquarters & Western US Production Facility

4240 E. La Palma Ave · Anaheim CA 92807

Toll Free: 800.955.9330

Phone: 714.993.2690

Fax: 714.993.1306

InfoSend owns and operates its 80,000 sq. ft. headquarters and Western US production facility. This facility sits on a 4.3-acre lot and is one of the premier bill processing centers in California. This facility acts as the primary data center, provides disaster recovery to the other facilities, and has a 600KW backup generator that can power the entire facility in the event of a grid failure. InfoSend's Anaheim facility is designated as a USPS Detached Mail Unit (DMU) with USPS representatives working on-site. This property also has a separate 25,000 sq. ft. building constructed on campus for additional office and warehouse space.



Midwest & Northeastern US Production Facility

1406 Centre Circle · Downers Grove IL 60515

Phone: 630.932.7300

InfoSend owns and operates a 25,000 sq. ft. Midwest production and disaster recovery facility located in Downers Grove, just west of Chicago, Illinois. This facility is used to process mail for clients located in the Midwest or Northeast, and also serves as an out of state disaster recovery facility. The location is designated as a USPS Detached Mail Unit (DMU) with USPS representatives working on-site.



Texas & Southeastern US Production Facility

1624 W Crosby Road #128 · Carrollton TX 75006

Phone: 214.390.7025

InfoSend's 21,000 sq. ft. Texas Production facility is located near Dallas and is the main production center for clients in the South and the Southeast. This facility also provides out-of-state disaster recovery for InfoSend's other locations.



**List main employee who will oversee this account, should you be awarded this contract.
Include name, title and all contact information.**

A dedicated Account Manager will be assigned to the City during contracting if InfoSend is selected as the successful vendor. Due to workload balancing, we do not make assignments until new projects are anticipated. That being said, the City will be provided with full information regarding the specific contact person and their qualifications during contracting.

InfoSend's Key Support Personnel

InfoSend's mission to provide the industry-best support requires excellence and attention to detail within the Client Services (CS) department. InfoSend has designed support around extensive procedural controls to ensure client output is handled accurately and issues are addressed expeditiously. If InfoSend is awarded the Water Authority's contract, we will at that point assign a dedicated Account Manager to work with the Authority on the implementation project. This Account Manager will remain the Authority's main point of contact throughout the implementation and will also be available after go-live for ongoing maintenance or improvement projects.

Executive Management and Sales:

InfoSend designated Contract Administrator: Russ Rezai, President

InfoSend designated Contract Manager: Matt Schmidt, COO

InfoSend sales contact: Kelly Law, Territory Sales Manager and Robert Crawford, Territory Sales Manager

Delivery Team:

- **Executive Management and Sales Team:** will serve as the City's main contact for RFP questions and contract negotiations.
- **Client Services Team:** manage ongoing processing, and will be main points of contact during the new client implementation process. Primary and secondary Client Services contacts will be assigned during the contracting phase if InfoSend is selected as the successful vendor. These contacts will report directly to Matt Schmidt, COO and Josue Martinez, Director of Client Services.
- **IT team:** will provide back-end support for the City's jobs. IT works in conjunction with InfoSend Client Services during any improvement projects and actively monitors program functions after go-live. IT personnel report to Vedat Aral, Director of IT.

Company References

List at least three companies or agencies to which you have provided a similar scope of services in the last three years. Include contact person name, title, and telephone number with a brief description of the services provided.

City of Iowa City, IA	319.356.5000
410 E. Washington St.	Melissa Miller, Revenue and Risk Manager
Iowa City, IA 52240	melissa-miller@iowa-city.org
<ul style="list-style-type: none">• Contracted Since: 2017• Billing System: Tyler Munis• Volume: Approximately 20,000 Mail Pieces Monthly• InfoSend Products Used: Data Processing Print and Mail, Print Image Archiving, Mail Tracking	

Cedar Falls Utilities	319.268.5246
P.O Box 769	Mark Meier, Supervisor
Cedar Falls, IA 50613	mjmeier@cfunet.net
<ul style="list-style-type: none">• Contracted Since: 2015• Billing System: Oracle CC&B• Volume: 16,500 Monthly• InfoSend Products Used: Data Processing Print and Mail	

Greenville Electric Utility Services	903.457.2870
6000 Joe Ramsey Blvd.	Cheryl Kay, Billing and Metering Supervisor
Greenville, TX 75402	ckay@geus.org
<ul style="list-style-type: none">• Contracted Since: 2014• Billing System: Tyler-Incode• Volume: Approximately 16,000 Mail Pieces Monthly• InfoSend Products Used: Data Processing Print and Mail, Print Image Archiving, API Integration.	

City of Maryville, MO	660.562.8009
415 N. Market	Denise Town, Finance Director
Maryville, MO 64468	townden@maryville.org
<ul style="list-style-type: none"> • Contracted Since: 2016 • Billing System: Tyler Incode • Volume: Approximately 5,000 Mail Pieces Monthly • InfoSend Products Used: Data Processing Print and Mail, Email ebilling 	

Chillicothe Municipal Utilities	660-646-1664
1425 Waterworks Rd.	Jackie Hoover
Chillicothe, MO 64601	jhoover@cmuchillicothe.com
<ul style="list-style-type: none"> • Contracted Since: 2009 • Billing System: Springbrook/Accela • Volume: 5,500 monthly • InfoSend Products Used: Data Processing Print and Mail 	

City of Elkhart, IN	574.293.2572 ext. 202
229 S. Second St.	Tim Reecer, Executive Svcs. Manager
Elkhart, IN 46516	Tim.reecer@coei.org
<ul style="list-style-type: none"> • Contracted Since: 2012 • Billing System: Tyler Incode • Volume: Approximately 17,000 Mail Pieces Monthly • InfoSend Products Used: Data Processing Print and Mail, Print Image Archiving, Mail Tracking 	

Pricing

InfoSend has addressed the City's pricing items line by line on the following pages. In addition, and in order to offer clarity on our pricing setup and items included and/or available to the City, we have provided our own pricing tables for review.

Price proposals should be based on a flat fee per bill mailed. This price should be based on a one-page bill. Price proposals should identify additional fees for bills that contain multiple pages. Proposals should clearly state what services and materials are covered in the cost to include materials and postage.

1. Initial Set-up:
 - a. **\$0.00 - Waived** per original design, layout, and proof
 - b. **\$125** per hour for future changes to layout
2. Paper Stock Components, which includes shipping, receiving, and storage
*InfoSend does not require preprinted forms for our production process. Pricing below is for blank perforated paper that we will then print on. In addition, pricing for envelopes is for our standard stock envelopes that we manufacture in-house.
 - a. Pre-printed forms – 8-1/2 x 11", 24lb. perforated, color over black ink
 - i. **\$15.00** per thousand
 - b. Outer envelope – double window, 4-1/8" x 9-1/2", black print on face only
*Up to full color envelope printing, called sniping, is available and commonly used for marketing purposes. See sample provided in our sample packet. InfoSend's envelope specifications were included earlier in this response.
 - i. **\$17.00** per thousand
 - c. Return envelope – can be window or preprinted address, 3-7/8" x 8-7/8" black print on face only
*this pricing is for our standard #9 envelope with window and no printing. InfoSend's envelope specifications were included earlier in this response.
 - i. **\$15.00** per thousand
3. Forms Printing:
 - a. 8-1/2" x 11" perforated, color logo, black ink, duplex (front & back)
 - i. **\$15.00** per thousand, for the paper material. Please see next section for our printing service fee.
 - b. #10 double window envelope
 - i. **\$17.00** per thousand
 - c. #9 window envelope, black ink
 - i. **\$15.00** per thousand, for a standard single window #9 return with no custom preprinting.
4. Print Statement:
 - a. Laser printing on variable pre-printed statement forms, simplex (front side), black ink
 - i. **\$53.00** per thousand, InfoSend's price includes data processing and duplex printing onto blank stock, up to two color
5. Additional Pages:
 - a. Print simplex (front side), black ink
 - i. **\$0.033** per printed statement (i.e. page 2, 3...) for the print fee, plus \$0.015 per page for the paper material.
6. Set-up Fee per cycle, if any:
 - i. **\$0.00 - included** each

7. Mail Preparation:

- a. Bursting
 - i. **\$0.00 - included** per thousand
- b. Folding – two (2) folds
 - i. **\$0.00 - included** per thousand
- c. Inserting - includes statement and return envelope
 - i. **\$0.00 - included** per thousand
- d. Special Insert
 - i. Pre-folded or 3.5" x 7" piece provided by customer
 - 1. **\$0.007** per inserted piece
 - ii. Insert piece provided by customer, to be folded
 - 1. **\$0.017** per inserted piece: **\$0.01** for the folding, **\$0.007** per insert
- e. Online Postage Metering or Indicia Method
 - i. Postage is subject to change in accordance with USPS approved rates. In the event the weight of a sealed envelope exceeds one ounce, applicable postage costs will be billed accordingly.
 - 1. **\$0.38** per envelope – the lowest First-Class presort rate, including all discounts for 2019. Not all mailpieces will qualify. InfoSend will invoice postage at an exact pass-through cost and does not markup postage expenses.
- f. Postage Deposit
 - i. **\$14,707.20** – Postage deposit is equal to two months' postage at the First-Class rate, before discounts. This amount was calculated by using an approximate volume of 19,200 bills per month, the First-Class rate of \$0.383, and multiplying by two. InfoSend is willing to consider a smaller postage deposit if the City can agree to Net 15 payment terms.
- g. CASS Certification
 - i. Cass ensures the USPS can deliver to the address. It looks at the address components only. Cass improves quality and assigns delivery point barcodes to addresses.
 - 1. **\$0.00 - included**
- h. NCOA Link
 - i. NCOA link searches database for the individuals, families, and businesses that have moved and filed a change of address with the USPS in the last 18 months.
 - 1. **\$0.25** per hit
- i. PDF Generation (one PDF generated per file)
 - i. **\$0.00 - included** per selection

- j. Intelligent Mail Barcode
 - i. **\$0.00 - included** per thousand
 - k. Production Reporting via Internet
 - i. Move Update/Change of Address Report (if NCOA link processing done)
 - ii. Bad Address Report
 - iii. Submission Verification Report (3602 Postage Statement)
 - iv. Account Detail Report (including quantity printed & postage used)
 - 1. **\$0.00 - included**
8. Electronic Document Services
- a. Customer electronic access prior to print, which allows the viewing and editing of statements on-line prior to the actual printing. The following options are available:
 - i. Omit (do not print)
 - ii. No-mailer (print, do not mail, return to client)
 - iii. Edit a document
 - iv. Add message to document
 - 1. **\$0.00 – included InfoSend supports items i. ii. and iv. As standard via tools available on our web portal, at no additional fee. We do not offer the option to edit a document in real time however. Should the City wish to edit a document, we can support that via submitting the request to our Client Services team.**
 - b. Customer electronic access following print, which allows up to 30 days after statements have been printed or mailed. Customer will have the option to search, reprint and or generate a PDF on an on-demand basis.
The City will have access to a sample file that is available for free via our web portal, which will include one PDF with all bills processed per run. InfoSend also offers a more robust archiving service, with a standard 12 months of billing history.
 - i. **\$0.01** per record for 12 months of retention.
 - ii. **\$X.XX** per 30 days of storage thereafter – **See InfoSend’s accompanying pricing tables for further information. We offer 12, 18, 24, and 36 months retention as standard but can also provide longer if needed.**
 - iii. **\$X.XX** per archive CD per month – **See InfoSend’s accompanying pricing table with Final Doc Transfer pricing, which is used in lieu of CD archiving.**

14 ADDITIONAL PRICING INFORMATION

- a) Any incidental charges, fees, or other rates required for additional materials or services should be clearly identified as being separate and additional. These additional charges should be listed and explained.

For clarity’s sake, InfoSend has included our own pricing tables that are comprehensive of the services we are quoting. If the City has any questions about our pricing setup or the way we invoice clients, we welcome the dialogue.

- b) List all costs associated with program implementation. The City of Ankeny will not pay any “extra” charges or fees not clearly submitted for consideration with the proposal. Costs associated with City software updated should be stated, if applicable.

InfoSend has waived all initial implementation and setup fees, including regular bill notices and termination notices. This includes a free bill design option, should the City have an interest in modernizing its bill design.

InfoSend Data Processing, Print and Mail Pricing

Document Production Summary	
All Document Types One 8.5" x 11" page, up to two color duplex (2/2), including InfoSend standard envelopes. Pricing reflects and estimated volume of 19,200 documents a month, with an approximate 4-6 billing runs per month.	\$0.10 per document

The below provides the components of the summary price given above, with the green shaded cells being items in our standard bill package. All pricing is based on "Client Volume Assumptions" listed below and excludes applicable sales tax.

Setup and Data Processing	
Setup Fee - Express PDF Input Files	\$0.00 - Waived
Setup Fee – Data Only Input Files	\$0.00 - Waived
Document Re-Design Fee	\$0.00 - Waived
Data Processing Fee (per document)	\$0.02

Printing and Mailing Service	
USPS Postage	Pass-through A postage deposit will be required prior to starting service.
All Documents Print Fee per Page with 2/2 Ink	\$0.033
Print Color Options (colors per side)	\$0.038 for 3/1, 3/2 or 3/3 printing \$0.043 for 4/0 or 4/1 printing \$0.048 for 4/4 printing
Inline Insert Print Fee	\$0.043 Black printing \$0.053 Color printing
Batch Fee (per mailing batch under 200 mail pieces)	\$5.00
Excess Pages Handwork Surcharge (per mail piece)	\$0.25
Address Updates	\$0.25 NCOA \$0.25 ACS

Materials	
Standard Paper Stock (per sheet)	\$0.015
Standard Outgoing #10 Envelope	\$0.017
Standard Return #9 Envelope	\$0.015
Outgoing Flat Envelope – used for mail pieces with excess pages	\$0.17

Insert Services	
Insert Printing – InfoSend Produced	Quoted based on specification
Machine Inserting Fee, Drop Shipped or InfoSend produced inserts	\$0.007 per insert, \$0.01 additional if folding is needed
Electronic Inserts	\$0.015

Optional Services	
Envelope Messaging (Snipes)	Quoted based on specification, price depends on volume ordered
Print Image Archiving (Per Document Image), with included USPS mail tracking	\$0.01 - For 12 Months of Retention \$0.017 - For 18 Months of Retention \$0.022 - For 24 Months of Retention \$0.027 - For 36 Months of Retention
Final Doc Transfer (FTP)	\$0.012 per image InfoSend Batch File \$0.015 per image Custom File Format
Return Mail Service	\$0.25 per reported returned mail piece \$0.50 per mail piece returned to InfoSend PO Box
Professional Services Rate (per hour)	\$121