

PROCUREMENT DEPARTMENT
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CITY OF PHILADELPHIA

Hugh Ortman
Procurement Commissioner

June 10, 2013

BID NUMBER: S4QG8360
TITLE: Printing and Mailing of Tax Forms
DEPARTMENT: REVENUE DEPARTMENT-REVENUE COLLECTION DIVISION
DATE TO OPEN: June 12, 2013 at 10:30 AM

ADDENDUM # 1

TO ALL BIDDERS:

You are hereby notified of the following changes to the above mentioned bid:

Bid S4QG8360 has been postponed and will now open on June 19, 2013 at 10:30 AM.

Attached are questions and responses resulting from the mandatory pre-bid meeting of May 29, 2013. The City reserves the right not to accept any additional questions at this time.

Please sign, date and return this addendum with your bid to the Procurement Department, 1401 J.F.K Boulevard, Bid Room 170A, Philadelphia, PA 19102-1685 as it now becomes a part of the proposal.

A. Campfield
Buyer, A. Campfield

AUTHORIZED SIGNATURE

FIRM NAME (PRINT)

DATE

AC/bws

Invitation & Bid Number S4QG8360
Printing and Mailing of Tax Forms
Questions and Answers from Mandatory Pre-Bid of May 29, 2013

For clarification purposes: Page 21, Section 5: Pricing

The following line items are Match Mailing: 5.1, 5.2, 5.3 and 5.4.3

The following line items are Not Match Mailing: 5.4.1, 5.4.2 and 5.5.1

Group A / Questions

Question #1

Coupon Sheet is listed as 1/1 – Actual Sample was 1/0 - Which spec is correct?

Answer:

Bidders shall refer to Sample Specification which was 1/0 plus variable image.

Group B / Questions

Question #1

Coupon Sheet is listed as 1/1 – Actual Sample was 1/0 - Which spec is correct?

Answer:

Bidders shall refer to Sample Specification which was 1/0 plus variable image.

Question #2

Spec sheet states that “Both Sheets will be programmed ...”. It appears that all 3 sheets are personalized. Please confirm?

Answer:

All 3 sheets are personalized.

Group C / Questions

Question #1

Coupon Sheet is listed as 1/1 – Actual Sample was 1/0 - Which spec is correct?

Answer:

Bidders shall refer to Sample Specification which was 1/0 plus variable image.

Question #2

Spec sheet states that “Both Sheets will be programmed ...”. It appears that all 3 sheets are personalized. Please confirm?

Answer:

All 3 sheets are personalized.

Group D / Questions

Question #1

All items are listed as booklets. All samples were flat sheets and envelopes. Which spec is correct?

Answer:

Reference to Booklets is hereby deleted. Bidders shall refer to flat sheets and envelopes sample specifications.

Question #2

There is a Change Form listed as part of the Earnings & Wage packages, however there was no sample provided at the Pre Bid meeting. Is this form still part of the package? If it is, can we see a sample of this form? Also if there is a Change Form please advise if this is personalized (programmed)?

Answer:

Reference to Change Form is hereby deleted.

Group D / Questions - Continued

Question #3

WAGE ANNUAL RECONCILIATION BOOKLETS

Change Form is missing. Is this still part of the package?

Answer:

Reference to Change Form is hereby deleted.

Question #4

For the Form 5008 – 8 ½ x 11 Wage Tax Reconciliation Form

The spec states that the form is 2/0 – Actual sample is 2/1. Which Spec is correct?

Answer:

Bidders shall refer to Sample Specification which was 2/1.

Question #5

No personalization shown on sample. Is this form personalized?

Answer:

This form is Not personalized.

Question #6

Is the barcode LIVE or STATIC?

Answer:

Static.

Group D / Questions - Continued

Question #7

If the barcode is STATIC, what constituted this as a match mailing?

Answer:

This is Not a match mailing for the 8-1/2 x 11 Wage Tax Reconciliation Form.

Question #8

For the Form 5008 – 8 ½ x 14 Wage Tax Reconciliation Form

The spec states that the form is 2/0 – Actual sample is 2/1. Which Spec is correct?

Answer:

Bidders shall refer to Sample Specification which was 2/1.

Question #9

EARNINGS TAX BOOKLETS

Change Form is missing. Is this still part of the package?

Answer:

Reference to Change Form is hereby deleted.

Question #10

For the Form 6008 – 8 ½ x 11 Earnings Tax Instructions Form

No personalization shown on sample. Is this form personalized?

Answer:

This form is Not personalized.

Group D / Questions - Continued

Question #11

Is the barcode LIVE or STATIC?

Answer:

Static.

Question #12

If the barcode is STATIC, what constituted this as a match mailing?

Answer:

This is Not a match mailing for the 8-1/2 x 11 Earnings Tax Instruction Form.

Question #13

SCHOOL INCOME TAX BOOKLETS (With Tax Returns/Coupons)

#10 S Coupon:

Specs are missing for this item?

Answer:

Bidders shall refer to Sample Packages.

Should they be 2/1 with 2 horizontal perforations?

Answer:

Correct.

Spec states Match Mail. What are the components that need to be Match Mailed?

Answer:

The Coupon and Extension Coupon (Item 5.4.3) are Match Mailed.

Group E / Questions

Question #1

For the 4308 - 8 ½ x 11 School Income Tax Form

Is this form personalized? No personalization shown on sample.

Answer:

The 8-1/2 x 11 School Income Tax Coupon Form is Personalized.

The 8-1/2 x 11 School Income Tax Instruction Sheet Form is Not Personalized.

Question #2

Is the barcode LIVE or STATIC?

Answer:

The 8-1/2 x 11 School Income Tax Coupon Form is Live.

The 8-1/2 x 11 School Income Tax Instruction Sheet Form is Static.

Question #3

If the barcode is STATIC, what constituted this as a match mailing?

Answer:

There is more than one variable piece in the package.

Question #4

There were two other forms that were not shown with any package:

School Tax Return General Filing Instructions, and School income Tax Extension Worksheet and Extension Payment Coupon. Where do these two forms belong?

Answer:

The two referenced Forms were attached with (Group E) Samples.

Group F / Questions

Question #1

Business U & O Package:

Are the 8 ½ x 14 Tax Returns personalized?

Answer:

Correct.

Question #2

There were no samples of the 8 ½ x 11 Generic Return at the Pre Bid meeting. Are they still being used. If yes, can we see a sample of the form.

Answer:

Reference to 8-1/2 x 11 Generic Return Form is hereby deleted.

Question #3

Will the data for each mailing be provided at the time of the mailing or at one time per year?
Will they be 18 individual data files?

Answer:

The data for mailings will be provided monthly. There will be twelve (12) data files.

Question #4

The outgoing envelope in the Semi-Annual Use & Occupancy did not have an inside security tint. All #10 Window Envelopes in the RFP are shown as tinted. Was this a mistake?

Answer:

All #10 Window Envelopes must be tinted.

General Questions

Question #1

As stated in the Pre Bid Meeting, all packages are to be quoted without the applicable envelopes. All envelope prices will be quoted separately. Is this correct?

Answer:

Correct.

Question #2

Would it be possible to get a listing of each mailing package and the exact components of each package? This would help to eliminate any confusion and ensure accuracy in the quote.

Answer:

Sample packages are available for review in the Procurement Department Public Information Unit located in Room 170B of the Municipal Services Building by those bidders who attended the Mandatory Pre-Bid Meeting of May 29, 2013 for subject Bid No. S4QG8360. Please Note: The Sample Packages are not permitted to be removed from the Procurement Department Public Information Unit.