

**REQUEST FOR BIDS
(RFB)**

BY

**BOARD OF COMMISSIONERS
DELAWARE COUNTY, OHIO**

AND

**DONALD E. RANKEY, JR.
DELAWARE COUNTY TREASURER
DELAWARE COUNTY, OHIO**

FOR

**UP TO THREE (3) YEAR CONTRACT FOR
REAL ESTATE PROPERTY TAX BILL
PRINTING, PROCESSING, HANDLING,
AND MAILING SERVICES**

**Donald E. Rankey, Jr.
Delaware County Treasurer
Delaware County Treasurer's Office
145 N. Union Street, 1st Floor
Delaware, Ohio 43015**

**(740) 833-2480
Fax (740) 833-2479**

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Legal Notice

Request for Bids (RFB) for Up to Three (3) Year Contract for Real Estate Property Tax Bill Printing, Processing, Handling, and Mailing Services

The Board of Commissioners, Delaware County, Ohio (“Board”) on behalf of the Delaware County Treasurer, Delaware County, Ohio (“Treasurer”) (Board and Treasurer collectively “County”) hereby requests bids for up to a three (3) year (2023, 2024, and 2025) contract for real estate property tax bill printing, processing, handling, and mailing services (collectively “Services”).

Delaware County, Ohio has approximately 98,000 real estate property tax parcels. Real estate property taxes are billed in two (2) installments annually. Approximately 42,000 tax bills are sent to property owners for each installment. Taxes are due on February 10th and July 10th of each calendar year. The Treasurer is responsible for mailing the bills for real estate property taxes at least twenty (20) days prior to these semi-annual due dates. For purposes of this Contract, all Services shall be complete and tax bills for each installment shall be mailed respectively no later than the first Friday of January and the first Friday of June ahead of each due date.

The County seeks a single contractor to enter into up to a three (3) year (2023, 2024, and 2025) contract to provide quality Services. All Services must meet the requirements of R.C. § 323.13 *et seq.*, all other applicable federal, state, and local laws, rules, and regulations, and the detailed specifications contained in the Request for Bids (“RFB”).

Bids shall be provided individually for all three (3) years (2023, 2024, and 2025). Award may, in the sole discretion of the Board, be for Services in only 2023 or Services in 2023 plus Services in any combination of years 2024 and 2025. In addition, bidders are encouraged to also submit a per piece alternate bid to provide similar printing, processing, handling, and mailing services for an alternate project consisting of additional or other billings/mailings for the Treasurer’s Office and/or Delaware County Regional Sewer District, if needed, during the term of the Contract. Details of any such alternate project shall be decided between the Parties at the time any such Services are needed. The alternate Bid is optional. The Board, in its sole discretion, may or may not award any alternate bid.

An RFB, including instructions, specifications, terms and conditions, bid documents, and the contract, can be obtained beginning November 12, 2022 as follows:

- During standard business hours (8:30 a.m. to 4:30 p.m. local time, Monday through Friday) at the Delaware County Treasurer’s Office, 145 N. Union St., 1st Floor, Delaware, Ohio 43015; or,
- By emailing the Delaware County Treasurer’s Chief Investment Officer, Rick Karr, at rkarr@co.delaware.oh.us and requesting a copy; or,
- Anytime online on either the Delaware County, Ohio (<https://co.delaware.oh.us/media-room/bids/>) or Treasurer’s Internet websites (<https://treasurer.co.delaware.oh.us/>). The RFB may be accessed on both websites by clicking on “RFB for Real Estate Property Tax Bill Printing, Processing, Handling, and Mail Services.”

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All persons who take or receive the RFB, regardless of how they receive it, are encouraged to contact Deputy Treasurer, Jessica Bendle, in person, by phone at (740) 833-2481, or email at jbendle@co.delaware.oh.us and provide their email and contact information so that they may receive any notices, supplements, amendments, and/or updates related to this RFB.

Bids will be received by Treasurer during standard business hours (8:30 a.m. to 4:30 p.m. local time, Monday through Friday) beginning December 7, 2022 until 10:00 a.m. local time on December 12, 2022 at the Delaware County Treasurer's Office, 145 N. Union St., 1st Floor, Delaware, Ohio 43015. Bids received after the above deadline will not be considered and will be returned unopened. Bidders are responsible for submitting their bids prior to the deadline. The County will not be responsible for any internal or external delivery delays which may cause a bid to arrive beyond the deadline.

At 10:00 a.m. on December 13, 2022, bids will be publicly opened and read aloud at the Delaware County Treasurer's Office, 145 N. Union St., 1st Floor, Delaware, Ohio 43015. The time, date, and place of bid opening may be changed by the Treasurer. Notice of any change shall be emailed not later than ninety-six (96) hours prior to the original time and date fixed for opening to all persons who have previously received or requested an RFB and provided an email address to Deputy Treasurer, Jessica Bendle. All bids shall be considered valid until sixty (60) days after the bid opening date although not accepted or rejected.

Bids shall be submitted on the forms contained in the RFB. Bids shall contain the full name of each entity, person, party, and/or parties submitting the bid and all persons interested therein, as well as the address, telephone number, email address, and other contact information for the entity, person, party, and/or parties submitting the Bid. Forms shall be fully completed in accordance with the RFB.

Bidders must submit one complete signed original hard copy, plus three (3) additional hard copies, of their Bid. Additionally, one complete electronic copy of the Bid in .pdf format must also be submitted on a USB drive. Bids shall be submitted to the Delaware County Treasurer's Office, 145 N. Union St. 1st Floor, Delaware, Ohio 43015 by the above stated deadline. Bids shall be enclosed in a sealed opaque envelope bearing on the outside the bidder's name and address and be clearly marked: "Bid for Real Estate Property Tax Bill Printing, Processing, Handling, and Mailing Services." If submitted by mail, the sealed envelope containing the Bid shall be enclosed inside another outer envelope for purposes of mailing, so that the Bid inside is not opened when opening the outer mailing envelope. Failure to do so may result in the Bid being opened prematurely and, if so, will result in the disqualification of the Bid.

Each bidder shall furnish, at the time of its bid, security in accordance with R.C. §§ 307.88 and 153.54 *et seq.* Security shall be either a bond or certified check, cashier's check, or money order on a solvent bank or savings and loan association in the amount of five per cent (5%) of the total amount of the bid for a contract for year 2023. Security shall be conditioned on the bidder, if the bidder's bid is accepted, executing a contract in conformity with the invitation (RFB) and the bid within ten (10) days after notice of award. Security shall be in the name of the Board ("Board of Commissioners, Delaware County, Ohio").

Security furnished in bond form shall be issued by a surety company or corporation licensed in the State of Ohio to provide said surety. Any surety company providing a bond, shall have a minimum A.M. Best Company Policyholder's Rating of A-, have or exceed the Best Financial Size Category of Class VI, and in all other respects be acceptable to the Board. Attorneys-in-fact who sign a bond must file a certified and effectively dated copy of their power of attorney, together with a copy of the Certificate of Authority issued by the Ohio Department of Insurance authorizing the surety company to engage in such business in the State of Ohio and issue the bond.

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No performance bond is required. However, as a condition to entering a contract, the successful bidder shall be required to faithfully performance of all things to be done under the contract.

The Board shall award the contract to the Bidder deemed to have submitted the lowest and best bid, as determined solely by the Board and/or its representative(s). The Board reserves the right to reject any and/or all bids, or any portion of any and/or all bids; to waive any informalities or irregularities that do not affect the substance of this notice, the specifications, the RFB, or the contract; and to award the contract in the manner deemed to be in the best interest of the Board, Treasurer, and Delaware County, Ohio. Neither this notice nor the submission of a bid shall commit the Board to award a contract, to pay any costs incurred in preparation of a response to this RFB, or to procure or contract any services. The Board reserves the right to modify or cancel, in whole or in part, the scope of the contract reflected in this RFB.

This notice is also posted on the Delaware County, Ohio (<https://co.delaware.oh.us/media-room/bids/>) and Treasurer’s internet websites (<https://treasurer.co.delaware.oh.us/>). The notice may be accessed on both websites by clicking on “RFB for Real Estate Property Tax Bill Printing, Processing, Handling, and Mail Services.”

By resolution of: Board of Commissioners, Delaware County, Ohio, 91 N. Sandusky St., Delaware, Ohio 43015; Donald E. Rankey, Jr., Delaware County Treasurer.

Publication (R.C. § 307.87(A))	
Newspaper (general circulation in County)	1X - Published at least 2 weeks before bid opening
State Public Notice Website (R.C. § 125.182)	Placed by newspaper publisher
Website (Treasurer and County)	Continuously
Bulletin Board (public place in Treasurer’s Office and public palace in Commissioner’s Office)	Post at least 2 weeks before the day of bid opening and maintain continuously

IMPORTANT NOTE

By submitting a bid, Bidders will be presumed to be familiar with all the instructions, requirements, and Specifications set forth in this RFB and the Contract. Bidders are advised to read, understand, and become familiar with the instructions, requirements, and Specifications set forth in this RFB and the Contract.

SECTION 1 - DEFINITIONS

As used in the Contract Documents, the following capitalized words and phrases have the following meanings:

- A. "Alternate Awarded Bid Amount" means the per piece amount of the winning bid, if any, for the Alternate Project.
- B. "Alternate Project" means a separate project to provide on a per piece basis similar printing, processing, handling, and mailing services for additional or other billings/mailings for the Treasurer's Office and/or Sewer District, if needed, during the term of the Contract. Details of any such Alternate Project shall be decided between the Parties at the time any such Services are needed.
- C. "Awarded Bid Amount" means the amount of the winning bid.
- D. "Bid" means a bid submitted pursuant to this RFB and all completed forms and documents required to be submitted as a part of the bid.
- E. "Bidder" means any entity, person, company, partnership, or firm submitting a bid pursuant to this RFB. Bidder includes the Contractor.
- F. "Board" means the Board of Commissioners, Delaware County, Ohio and its duly elected or appointed board members and/or representatives.
- G. "Contract" means the "Contract for Real Estate Property Tax Bill Printing, Processing, Handling, and Mailing Services" (See Appendix I) and includes all Contract Documents and any and all forms, attachments, appendixes, and/or exhibits to any of these documents.
- H. "Contract Documents" means the Legal Notice, the RFB, the Bid, the Bidder's submittal, the Contract, and all forms, attachments, appendixes, and/or exhibits to these documents and any and all addenda to any of these documents.
- I. "Contracted Parties" collectively means the Contractor, any subcontractor, and any sub-subcontractor and includes, but is not limited to, any of the Contractor's, any subcontractor's, or any sub-subcontractor's boards, board members, officers, officials, directors, employees, volunteers, agents, and representatives.
- J. "Contractor" means the successful bidder and holder of the Contract and includes, the boards, board members, officers, officials, directors, employees, volunteers, agents, and representatives of the Contractor.
- K. "County" means either Delaware County, Ohio or collectively the Board and the Treasurer.
- L. "Exception" means a Bidder's inability or unwillingness to meet a term, condition, specification, or requirement in the manner specified in this RFB.
- M. "Indemnified Parties" collectively means the Board, the Treasurer, and all of their respective boards, board members, officers, officials, directors, employees, volunteers, agents, and

- representatives.
- N. "Legal Notice" means the published and posted legal notice and the legal notice included in this RFB.
 - O. "Party" means the Board, Treasurer, or Contractor individually.
 - P. "Parties" means the Board, Treasurer, and Contractor collectively.
 - Q. "Postage" means the actual cost of USPS first class postage at the lowest bulk discount rate at the time of mailing for the type of item mailed and, if applicable, weight of the item.
 - R. "RFB" means this Request for Bids package.
 - S. "Services" means collectively the provision of all labor, equipment, machinery, vehicles, time, supplies, and materials necessary to fully provide for quality real estate property tax bill printing, processing, handling, and mailing services, all in accordance with this RFB and the Contract.
 - T. "Sewer District" means the Delaware County, Ohio Regional Sewer District.
 - U. "Treasurer" means the elected or appointed Treasurer of Delaware County, Ohio or his/her representative.
 - V. "Treasurer's Office" means the regular office where the Treasurer conducts his/her business, currently located at 145 N. Union St., 1st Floor, Delaware, Ohio 43015.
 - W. "Website" means the Delaware County, Ohio internet website (<https://co.delaware.oh.us/media-room/bids/>) and/or the Treasurer's internet website (<https://treasurer.co.delaware.oh.us/>).

Section 2 – Background and Purpose

2.1 Background

Delaware County, Ohio is located in central Ohio immediately north of the expanding metropolitan area of Columbus, Ohio. It has a total land area of 459 square miles, with a population of approximately 214,000.

Delaware County, Ohio has approximately 98,000 real estate property tax parcels. Real estate property taxes are billed in two (2) installments annually. Approximately 42,000 tax bills are sent to property owners for each installment. Taxes are due on February 10th and July 10th of each calendar year¹. The Treasurer is responsible for mailing the bills for real estate property taxes at least twenty (20) days prior to these semi-annual due dates. For purposes of this Contract, all Services shall be complete and tax bills for each installment shall be mailed respectively no later than the first Friday of January and the first Friday of June ahead of each due date.

2.2 Purpose

The purpose of this RFP is for a single contractor to enter up to a three (3) year (2023, 2024, and 2025) Contract with the Board on behalf of the Treasurer for real estate property tax bill printing, processing, handling, and mailing services.

All Services must meet the requirements of R.C. § 323.13 *et seq.*, all other applicable federal, state, and local laws, rules, and regulations, and the detailed specifications contained in the RFB. Services shall be of good quality and be provided and performed in a timely and professional workman like manner.

Bids shall be provided individually for all three (3) years (2023, 2024, and 2025). Award may, in the sole discretion of the Board, be for Services in only 2023 or Services in 2023 plus Services in any combination of years 2024 and 2025.

In addition, Bidders are encouraged to also submit a per piece alternate Bid to provide similar printing, processing, handling, and mailing services for an Alternate Project consisting of additional or other billings/mailings for the Treasurer's Office and/or Sewer District, if needed, during the term of the Contract. Details of any such Alternate Project shall be decided between the Parties at the time any such Services are needed. The alternate Bid is optional. The Board, in its sole discretion, may or may not award any alternate Bid.

¹ **Important Note:** Real estate property tax due dates are established by the State of Ohio. Any extension of the prescribed due date must be approved by the State of Ohio upon application of the county treasurer. The Treasurer does not intend on seeking extensions of these dates.

Section 3 – Calendar of Events and Locations

3.1 Calendar of Events

The following is the calendar of events for this RFB. The dates in this calendar are subject to change at the County's discretion and with prior notice to all Bidders who have received or requested an RFB and provided an email address to Deputy Treasurer, Jessica Bendle as stated in the Notice.

ACTION	DATE(S)	TIME
Dates of Advertisement	11/11/22 & 11/16//22	N/A
RFP Issue	11/12/22	12:00 p.m.
Written Questions Due	11/21/2022	4:30 p.m.
Answers Written to Questions Emailed/Posted	12/6/22	4:30 p.m.
Bids Due	12/12/22	4:30 p.m.
Bids Opened	12/13/22	10:00 a.m.
Intent to Award	1/6/23	N/A
Contract to Be Executed	1/21/23	N/A

3.2 Locations

BID SUBMITTAL

Delaware County Treasurer's Office
145 N. Union St., 1st Floor
Delaware, Ohio 43015

BID OPENING

Delaware County Treasurer's Office
145 N. Union St., 1st Floor
Delaware, Ohio 43015

Section 4 – Instructions and Bid Submittal

To submit a Bid in response to this RFB, Bidders must comply with each of the format and submission requirements in this Section and as otherwise contained in this RFB.

4.1 Obtaining RFB

It is the Bidder's responsibility to obtain a full RFB from the Treasurer's Office or either of the Websites.

An RFB, including the Legal Notice, instructions, bid documents, specifications, terms and conditions, the Contract, and Contract Documents can be obtained as follows:

- During standard business hours (8:30 a.m. to 4:30 p.m. local time, Monday through Friday) at the Treasurer's Office, 145 N. Union St., 1st Floor, Delaware, Ohio 43015; or,
- By emailing the Treasurer's Chief Investment Officer, Rick Karr, at rkarr@co.delaware.oh.us and requesting a copy; or,
- Anytime online on either the Delaware County, Ohio (<https://co.delaware.oh.us/media-room/bids/>) or Treasurer's internet websites (<https://treasurer.co.delaware.oh.us/>). The RFB may be accessed on both websites by clicking on "RFB for Real Estate Property Tax Bill Printing, Processing, Handling, and Mail Services."

All persons who take or receive the RFB, regardless of how they receive it, are encouraged to contact Deputy Treasurer, Jessica Bendle, in person, by phone ((740) 833-2481), or email (jbendle@co.delaware.oh.us) and provide their email and contact information so that they may receive any notices, supplements, amendments, and/or updates related to this RFB.

4.2 Bid Submission

Bids shall be submitted as follows:

- Bids will be received at the Treasurer's Office during standard business hours (8:30 a.m. to 4:30 p.m., local time, Monday through Friday) beginning December 7, 2022 **until 10:00 a.m. local time on December 13, 2022 ("Submission Deadline")**.
- Bids shall be enclosed in a sealed opaque envelope bearing on the outside the Bidder's name and address and be clearly marked: "Bid for Real Estate Property Tax Bill Printing, Processing, Handling, and Mailing Services."
- If submitted by mail, the sealed envelope containing the Bid shall be enclosed inside another outer envelope for purposes of mailing, so that the Bid inside is not opened when opening the outer mailing envelope. Failure to do so may result in the Bid being opened prematurely and, if so, will result in the disqualification of the Bid.
- Bids will be received at and shall be either delivered or mailed to:

Delaware County Treasurer's Office
145 N. Union St., 1st Floor
Delaware, Ohio 43015.

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- Mailed Bids must be physically received by the Treasurer’s Office at or before the Submission Deadline. Date mailed and postmarks will not be considered as the date received. Bids received after the Submission Deadline shall not be considered, shall be rejected, and will be returned unopened.
- Bidders are responsible for submitting their Bids prior to the Submission Deadline. The County will not be responsible for any internal or external delivery delays which may cause a Bid to arrive beyond the deadline.
- Bids received after the Submission Deadline shall not be considered, shall be rejected, and will be returned unopened.
- Unsolicited amendments to bids received after the Submission Deadline shall not be considered, shall be rejected, and will be returned unopened.

4.3 Number of Copies

One complete signed original hard copy, plus three (3) additional hard copies, of the Bid must be submitted. Additionally, one complete electronic copy of the Bid in .pdf format must also be submitted on a USB drive. (See Sec. 4.5 for a listing of forms, affidavits, and documents to be submitted as a part of the Bid.)

4.4 Form of Bid Submission

Bids shall be submitted in substantially the following form:

- Bids shall be submitted in hard copy and electronically in .pdf format on a USB drive. Bids in other formats will not be accepted.
- Bids shall be submitted in a three (3) ring, spiral, or similar binder. The binder shall contain the documents and be organized in the order of the items listed in Sec. 4.7. The USB drive should be included in or attached to the binder.
- Bids shall be submitted on the forms contained in this RFB.
- Forms shall be fully completed, with all blank spaces completed, in accordance with this RFB. The County assumes no responsibility for errors, false assumptions, or misrepresentations resulting from incomplete forms.
- Bids shall contain the full name of each entity, person, party, and/or parties submitting the Bid and all persons interested therein, as well as the address, telephone number, email address, and other contact information for the entity, person, party, and/or parties submitting the Bid.
- Bids shall not contain any erasures or corrections. Bids containing erasures or corrections may be rejected unless the erasures or corrections are explained or noted over the signature of the Bidder.
- The Bid shall be signed in ink by a person authorized to sign the Bid on behalf of the person or principal submitting the Bid. The signer shall be authorized to bind the Bidder.
- Bids shall include information satisfying and/or addressing the specifications contained in this RFB and the Contract Documents.
- Each Bid shall contain a bid amount for providing Services in each individual year of 2023, 2024 and 2025. Award may, in the sole discretion of the Board, be for Services in only 2023 or Services in 2023 plus Services in any combination of years 2024 and 2025. (See Appendix A, Bid Form).

- In addition, Bidders are encouraged to also submit a per piece alternate Bid to provide similar printing, processing, handling, and mailing services for an Alternate Project consisting of additional or other billings/mailings for the Treasurer’s Office and/or Sewer District, if needed, during the term of the Contract. Details of any such Alternate Project shall be decided between the Parties at the time any such Services are needed. The alternate Bid is optional. The Board, in its sole discretion, may or may not award any alternate Bid. (See Appendix A, Bid Form).
- The Bidder must complete and submit all forms and affidavits required by and included in this RFB (See Section 4.5).
- The Bidder must submit all documents required to be submitted by this RFB (See Section 4.5).
- Bids shall be enclosed in a sealed opaque envelope bearing on the outside the Bidder’s name and address and be clearly marked: “Bid for Real Estate Property Tax Bill Printing, Processing, Handling, and Mailing Services.”
- If submitted by mail, the sealed envelope containing the Bid shall be enclosed inside another outer envelope for purposes of mailing, so that the Bid inside is not opened when opening the outer mailing envelope. Failure to do so may result in the Bid being opened prematurely and, if so, will result in the disqualification of the Bid.
- Bids should be addressed and submitted to:

Delaware County Treasurer’s Office
 145 N. Union St., 1st Floor
 Delaware, Ohio 43015.

4.5 Documents to be Submitted

The following documents shall be submitted with the Bid:

- Bid Form. - Fully completed to include:
 - Bidder information.
 - History of Bidder.
 - Qualifications of Bidder.
 - Complete description of services to be provided.
 - Proposed work plan and schedule.
 - Plan for quality control.
 - Location where Services for the County will be performed.
 - Bid amounts.
 - Complete detailed statement of qualifications evidencing the Bidder’s capabilities and experience in printing, processing, handling, and mailing services.
 - Experience of providing similar services to other governmental entities.
 - Complete listing of all subcontractors, if any are to be used.
 - Three (3) references.
 - All other information required by the Bid Form.
- Example Tax bills and envelopes. In accordance with R.C. § 323.131, each tax bill prepared and mailed or delivered shall be in the form and contain the information required by the State of Ohio Tax Commissioner. A copy of this form is attached as Appendix J. Bidders shall include an example tax bill in this form that includes examples of all printed data. A sample outgoing envelope for mailing the tax bill and a sample return envelope for returning payment shall also be included.
- Contract. The Contract should be completed and signed, without modifications, by the Contractor in the event of award. **The Contractor’s return of the Contract unilaterally signed by the Contractor is not and should not be interpreted as any guaranty of award or as the existence**

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of any contract between the Contractor and the Board. No Contract exists until the Board makes an award, if any, and signs the Contract.

- **Proof of Insurance.** Proof of the insurance policies and coverage required by the Contract and/or the ability to obtain such insurance policies and coverage prior to beginning any work under the Contract, if awarded.
- **Licenses/Certifications.** Copies of all licenses, permits, and/or certifications required by this RFB and/or applicable to the Services.
- **Financial Statements of Bidder** (if applicable).
- **Bid Security.**
- **Warranty.** Warranty must warrant and guarantee that Bidder will provide identical or better quality tax bills and envelopes than those included in the examples attached to the Bid.
- **Other Documents and Information.** All other documents and information required by this RFB, including, but not limited to, the following:
 - Fully executed and notarized Non-Collusion Affidavit (Appendix B);
 - Fully executed and notarized personal property tax affidavit (Not Delinquent or Delinquent as applicable) (Appendix C);
 - If the Bidder is a corporation, a notarized and fully executed affidavit indicating that the person that signs the Bid and the Contract is authorized to sign on behalf of the corporation and bind the corporation (Appendix D);
 - Fully executed Non-Discrimination Form (Appendix E);
 - If applicable, fully executed Ohio Public Employees Retirement System (OPERS) Independent Contractor/Worker Acknowledgement (Appendix F);
 - A completed Federal W-9 form (Appendix G);
 - Any other form required by this RFB.

All forms and affidavits referenced above are attached hereto and by this reference incorporated into this RFB and the Contract.

4.6 Bid Price

Each Bid shall contain a bid amount for providing Services in each individual year of 2023, 2024 and 2025. The Bid amounts shall be inclusive of all Services to be provided each year, including, but not limited to, all data entry. The Bid shall also include a separate sum total of the Bids for all three (3) years (2023+2024+2025). Award may, in the sole discretion of the Board, be for Services in only 2023 or Services in 2023 plus Services in any combination of years 2024 and 2025. (See Appendix A, Bid Form).

In addition, Bidders are encouraged to also submit a per piece alternate Bid to provide similar printing, processing, handling, and mailing services for an Alternate Project consisting of additional or other billings/mailings for the Treasurer's Office and/or Sewer District, if needed, during the term of the Contract. Details of any such Alternate Project shall be decided between the Parties at the time any such Services are needed. The alternate Bid amount should be per piece and be inclusive of all services to be provided, including, but not limited to, all data entry. The alternate Bid is optional. The Board, in its sole discretion, may or may not award any alternate Bid. (See Appendix A, Bid Form).

Postage shall not be included in the amount of any Bid or Alternate Bid. Postage shall be charged separately to the Board at actual cost. Separate invoices for Postage shall be sent to the Board.

4.7 Organization of Bid

Bids shall be submitted in a three (3) ring, spiral, or similar binder. The binder shall contain the following documents organized in the following sections. The sequence of the sections shall be the same as the sequence of the sections in the list below.

A. Cover Letter

The cover letter shall meet the following requirements:

- Be in the form of a standard business letter.
- Contain a summary of the services to be provided.
- Contain a statement guaranteeing the validity of the bid for a period of no less than sixty (60) days after bid opening date although not accepted or rejected.
- Contain a statement certifying Bidder's compliance with the minimum Contractor qualifications as provided in this RFB.
- Be signed by an individual authorized to legally bind the Bidder.
- Contain the name, address, telephone number, facsimile number, and email address of:
 1. A contact person with authority to answer questions regarding the bid.
 2. A contact person to be notified regarding legal/contractual issues.

B. Bid Form

The fully completed Bid Form as contained in this RFB shall accompany this bid. The Bid shall be signed in ink by a person authorized to bind the Bidder. Included on the bid form or, if necessary, on an additional attached 8 ½ x 11 sheet of white paper, shall be the following:

- Bidder information
- Information on person submitting bid
- Bidder contact information
- History of Bidder
- Qualifications of Bidder, including the Bidder's capabilities and experience in printing, processing, handling, and mailing services.
- Experience providing similar services to governmental entities.
- Complete description of services to be provided.
- Proposed work plan and schedule.
- Plan for quality control.
- Location where Services for the County will be performed.
- Bid amount for Services in each individual year of 2023, 2024 and 2025. The Bid amounts shall be inclusive of all Services to be provided each year, including, but not limited to, all data entry. The Bid shall also include a separate sum total of the Bids for all three (3) years (2023+2024+2025).
- Optional a per piece alternate Bid to provide similar printing, processing, handling, and mailing services for additional or other billings/mailings for the Treasurer's Office and/or Sewer District, if needed, during the term of the Contract. The alternate Bid shall be per piece and be inclusive of all services to be provided, including, but not limited to, all data entry.

- Postage shall not be included in the amount of any Bid or Alternate Bid. Postage shall be charged separately to the Board at actual cost. Separate invoices for Postage shall be sent to the Board.
- Complete listing of all subcontractors, if any are to be used
- Three (3) non-Bidder/Contractor-owned or non-business partner customer references where the Bidder has provided similar Services.

C. Example Tax Bills and Envelopes

In accordance with R.C. § 323.131, each tax bill prepared and mailed or delivered shall be in the form and contain the information required by the State of Ohio Tax Commissioner. A copy of this form is attached as Appendix J. Bidders shall include an example tax bill in this form that includes examples of all printed data. A sample outgoing envelope for mailing the tax bill and a sample return envelope for returning payment shall also be included.

D. Contract

The Contract should be completed and signed, without modifications, by the Contractor in the event of award. **The Contractor’s return of the Contract unilaterally signed by the Contractor is not and should not be interpreted as any guaranty of award or as the existence of any contract between the Contractor and the Board. No Contract exists until the Board makes an award, if any, and signs the Contract.**

E. RFB

A complete copy of the RFB with all blanks completed shall accompany the bid.

F. Forms

The following forms attached to and/or required by this RFB shall accompany the bid:

- Non-Collusion Affidavit (Appendix B);
- Personal Property Tax Affidavit (Not Delinquent or Delinquent as applicable)(Appendix C);
- Affidavit of Authority to Sign on Behalf of the Principal (Appendix D);
- Non-Discrimination Form (Appendix E);
- If applicable, OPERS Independent Contractor/Worker Acknowledgement (Appendix F);
- Federal W-9 Form (Appendix G);
- Any other form required by this RFB.

All forms shall be fully completed. All above referenced affidavits and forms are attached to this RFB and by this reference incorporated into this RFB and the Contract.

G. Bid Security (Bid Bond)

See Contract for requirements and Appendix H.

H. Licenses/Permits/Certifications

Copies of all licenses, permits, and/or certifications required by this RFB and/or applicable to the Services

I. Required Documents

The following documents shall accompany the bid:

- Proof of Insurance/Certificates of Insurance (all insurance policies required by this RFB/Contract or ability to obtain these policies);
- Financial Statements of Bidder (if applicable);
- Any other documents required by this RFB.

All documents referenced above shall be furnished by the Bidder. By this reference the above documents are incorporated into this RFB and the Contract.

J. Warranty.

Warranty must warrant and guarantee that Bidder will provide identical or better quality tax bills and envelopes than those included in the examples attached to the Bid.

K. Additional Information

Any additional information or attachments pertinent to the Contractor's bid not included under one of the required sections listed above.

The USB drive should be included in or attached to the binder.

4.8 Failure to Submit Required Documents

Each Bidder must complete and submit all applicable forms and affidavits required by and included in this RFB. Bids may be rejected if fully executed copies of any forms, affidavits, or other documents required by this RFB are not submitted or if any such affidavits, forms, or other documents are not fully completed.

4.9 Bid Opening

At 10:00 a.m. on December 13, 2022, bids will be publicly opened and read aloud at the following address/location:

Delaware County Treasurer's Office
145 N. Union St., 1st Floor
Delaware, Ohio 43015.

The time, date, and place of bid opening may be changed by the Treasurer. Notice of any change shall be emailed not later than ninety-six (96) hours prior to the original time and date fixed for opening to all persons who have previously received or requested an RFB and provided an email address to Deputy Treasurer, Jessica Bendle.

4.10 Validity of Bid

All bids shall be considered valid until sixty (60) days after the bid opening date although not accepted or rejected.

4.11 Withdrawal of Bid Before Bid Opening

A Bid may be withdrawn in writing at any time prior to bid opening.

4.12 Withdrawal of Bid After Bid Opening / Clerical Mistake

After Bids have been opened, Bids may not be withdrawn until at least sixty (60) days after the bid opening date. However, in the case of a Bid being substantially lower than other Bids as the result of a mathematical or clerical mistake by a Bidder in preparing its Bid, as opposed to a judgment mistake, the Board may, prior to award, reject such a Bid upon presentation of a petition from the Bidder accompanied by a sworn affidavit of error setting forth the error, the cause thereof, and sufficient evidence to substantiate the same as a mathematical or clerical mistake and not a mistake of judgment. The petition must be made in writing and filed with the Treasurer within two (2) business days after the bid opening.

4.13 Bid Security (Bid Bond)

All bids shall be accompanied by bid security. Each bidder shall furnish, at the time of its bid, security in accordance with R.C. § 307.88. Security shall be either a bond or certified check, cashier's check, or money order on a solvent bank or savings and loan association in the amount of five per cent (5%) of the total amount of the bid for a Contract for year 2023. Security shall be conditioned on the bidder, if the bidder's bid is accepted, executing a contract in conformity with the invitation (RFB) and the bid. Security shall be in the name of the Board ("Board of Commissioners, Delaware County, Ohio").

Security furnished in bond form shall be issued by a surety company or corporation licensed in the State of Ohio to provide said surety. Any surety company providing a bond, shall have a minimum A.M. Best Company Policyholder's Rating of A-, have or exceed the Best Financial Size Category of Class VI, and in all other respects be acceptable to the Board. Attorneys-in-fact who sign a bond must file a certified and effectively dated copy of their power of attorney, together with a copy of the Certificate of Authority issued by the Ohio Department of Insurance authorizing the surety company to engage in such business in the State of Ohio and issue the bond.

4.14 Performance Bond

No performance bond is required. However, as a condition to entering a contract, the successful bidder shall be required to faithfully performance of all things to be done under the contract.

4.15 Conditions of Work

Each Bidder must inform itself fully as to the conditions relating to the performance of the Contract and the employment of labor therefore. Failure to do so will not relieve the Bidder of its obligation to furnish all material and labor necessary to carry out the provisions of the Contract.

4.16 Financial Statements of Bidders

If applicable, all submitted Bids shall include the financial statements of the Bidder/company for the past one (1) year. "Financial Statements" include the balance sheet, income statement, and cash flow statement.

4.17 Investigations

The County may make such investigations as deemed necessary to determine the ability of the Bidder to perform the Services, and the Bidder shall furnish to the County all such information and data for this purpose as the County may request. The County reserves the right to reject any bid if the evidence submitted by, or investigation of, such Bidder fails to satisfy the County that such Bidder is properly qualified to carry out the obligations of the Contract and to complete the Services contemplated therein.

4.18 No Exceptions

There shall be no Exceptions to the Contract Documents, including, but not limited to the specifications and terms and conditions, unless accepted in a separate writing by the Board.

4.19 Contractor Acknowledgement

By submitting a Bid, the Bidder makes the following acknowledgements:

- The Bidder acknowledges that the Bidder has fully and completely read and reviewed the Contract Documents, that the Bidder fully and completely understands the Contract Documents, and the Bidder agrees to be bound by all their terms, requirements, and conditions.
- The Bidder acknowledges and understands that the Contract is not valid until it has been awarded and approved by the Board and all other necessary and applicable persons, entities, or Parties.

4.20 Ownership of Submitted Materials

All documents and materials submitted to and accepted by the County in response to this RFB shall become the property of the County and will not be returned. Such items will be retained and maintained by the County in accordance with applicable laws, rules, and regulations. All submitted documents and materials, including the contents of any Bid, may be subject to release/disclosure pursuant to the Ohio Public Records Act (R.C. § 149.43).

4.21 Cost of Submission

Bidders are responsible for any and all costs associated with submitting a Bid. The Board is not liable for any costs incurred by Bidders in replying to this RFB.

4.22 Notice to Proofread

IT'S ESSENTIAL THAT BIDDERS FULLY AND CAREFULLY REVIEW AND PROOFREAD THEIR BIDS. ONCE OPENED, BIDS CANNOT BE CHANGED, ALTERED, OR WITHDRAWN, EXCEPT AS EXPRESSLY PROVIDED IN THE CONTRACT DOCUMENTS. THE COUNTY RESERVES THE RIGHT TO REQUEST INFORMATION OR RESPOND TO INQUIRIES FOR CLARIFICATION PURPOSES ONLY.

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Section 5 – Communications

5.1 Communication Restrictions

Except as otherwise provided in this RFB, from the time of release of this RFB until the time a Contractor is selected and a Contract is awarded and executed, Bidders shall not communicate with any Board member, the Treasurer, or other County official, officer, director, employee, staff member, volunteer, representative, or agent concerning this RFB. Bidders that attempt any such communications will be disqualified. However, the County reserves the right to contact any person, firm, company, or entity who has submitted a Bid after all Bids have been publicly opened and read aloud.

The County, for purposes of clarification, reserves the right to contact any person, firm, company, or entity who has submitted a bid.

5.2 Pre-Bid Conference

There is no pre-bid conference.

5.3 Verbal Questions

Except as provided in the Notice or RFB, no Board member, the Treasurer, or other County official, officer, director, employee, staff member, volunteer, representative, or agent will respond to any verbal questions regarding this RFB. No official interpretation of the meaning of any documents in this RFB will be made to any potential Bidder orally.

5.4 Written Questions

The Treasurer will accept written questions regarding the RFB via regular U.S. mail, express carrier, or email until 4:30 p.m. on November 21, 2022. Questions will be accepted at the following addresses/numbers:

Mail/Express Carrier:

Jessica Bendle
Deputy Treasurer

Email:

Jessica Bendle
Deputy Treasurer

jbendle@co.delaware.oh.us

After each emailed question is sent, the Bidder shall call Deputy Treasurer, Jessica Bendle at (740) 833-2481 and state that a question has been sent via email along with their name, company, and phone number.

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Questions received after the above date and time will not receive a response.

All questions, regardless of how sent to the Treasurer, shall include the name to the person, firm, company, or entity submitting the question, company name, address, email address, and telephone number.

All questions and responses to such questions that are received by the above date and time will be emailed to all who receive and/or take a copy of this RFB and provide an email address to Deputy Treasurer, Jessica Bendle. Responses will also be posted on the Treasurer's website (<https://treasurer.co.delaware.oh.us/>) and can be viewed by clicking on "RFB for Real Estate Property Tax Bill Printing, Processing, Handling, and Mail Services."

Questions and responses shall be emailed and posted as stated above by 4:30 p.m. on December 6, 2022. The questions and responses shall become part of the Contract Documents. Failure of any Bidder to receive any such questions and answers shall not relieve the Bidder from any obligation under its Bid as submitted.

5.5 Modification / Amendment / Supplement to RFB

The County may modify, amend, or supplement this RFB at any time during the bidding process. Modification(s), amendment(s), and/or supplement(s) to this RFB will only be by written addendum issued by the Treasurer.

The Treasurer will email any modification(s), amendment(s), and/or supplement(s) to all prospective Bidders who receive and/or take a copy of this RFB and provide an email address to Deputy Treasurer, Jessica Bendle. Any modification(s), amendment(s), and/or supplement(s) will also be posted on the Treasurer's website (<https://treasurer.co.delaware.oh.us/>) and can be viewed by clicking on "RFB for Real Estate Property Tax Bill Printing, Processing, Handling, and Mail Services."

Should the County issue a modification, amendment, and/or supplement, the submission deadline, at the discretion of the Treasurer, may be extended, if appropriate, to accommodate changes in bid content.

Section 6 – Specifications

ALL CONTRACT SPECIFICATIONS ARE CONTAINED IN SECTION 6, SCOPE OF SERVICES, OF THE CONTRACT. THE CONTRACT IS LOCATED IN APPENDIX I OF THIS RFB.

Section 7 – Terms and Conditions

ALL CONTRACT TERMS AND CONDITIONS ARE CONTAINED IN SECTION 7, FINANACIAL AGREEMENT, AND SECTION 8, TERMS AND CONDITIONS, OF THE CONTRACT. THE CONTRACT IS LOCATED IN APPENDIX I OF THIS RFB.

Section 8 – Evaluation of Bids and Award

8.1 Overview of Process

Following bid opening, the Treasurer shall evaluate the submitted Bids and develop a recommendation. The Treasurer shall then submit the Bids, along with his/her recommendation, to the Board for review and evaluation. The Board shall select and award the winning bid.

8.2 Bid Opening

10:00 a.m. on December 13, 2022, bids will be publicly opened and read aloud at the following address/location:

Delaware County Treasurer's Office
145 N. Union St., 1st Floor
Delaware, Ohio 43015

At the time Bids are opened, each Bidder will be presumed to have read and be thoroughly familiar with the contents of the Contract Documents, including any and all addenda to any of those documents. The failure or omission of any Bidder to examine the Contract Documents shall in no way relieve any Bidder from any obligation in their Bid.

8.3 Evaluation

Evaluation of responses to this RFB will consist of the following three (3) phases:

Phase I: Verification by the Treasurer of compliance by a Bidder to the minimum technical requirements of the RFB.

Phase II: Evaluation by the Treasurer of the contents and merits of the Bids. Based on his/her evaluation, the Treasurer will rank the bids according to lowest and best. He/she will then develop and make a recommendation to the Board.

Phase III: Selection by the Board.

The Board reserves the right to supplement or change the evaluation process or selection criteria. Any such changes shall be made by supplement or addendum, issued to all that have received or taken an RFB and provided contact information to Deputy Treasurer, Jessica Bendle.

8.3.A Phase I – Evaluation of Minimum Technical Requirements

The first phase of the evaluation process consists of the Treasurer reviewing all bids received to ensure that each bid meets the minimum technical requirements contained in this RFB, including, but not limited to, those identified below:

1. One complete signed original hard copy, plus three (3) additional hard copies, of the Bid, and one complete electronic copy of the Bid in .pdf format on a USB drive, were submitted by deadline.
2. Bidder signed the Bid in accordance with this RFB.
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3. Bid includes the forms, affidavits, or other documents as are required to be submitted by this RFB and such forms, affidavits, or other documents are completed.
4. Bid complies with all other minimum technical requirements contained in this RFB.

Bids that have been determined not to have met one or more of the mandatory minimum technical requirements will be excluded from any further consideration.

8.3.B Phase II – Evaluation of Contents and Merits

The second phase of the evaluation process will only include those bids meeting the minimum technical requirements as provided in Section 8.3.A above (i.e. passing Phase I of the evaluation process). The merits and contents of such bids will be evaluated by the Treasurer based on, but not limited to, the following:

- The contents of the Bid;
- The merits of the Bid;
- The services to be provided by the Bidder;
- The capability to track bills;
- The security features in the billing processes;
- The other value-added services and costs to enhance the billing process;
- The ability of the Bidder to provide the Services;
- The proposed work plan and schedule of the Bidder;
- The ability of the Bidder to act timely in providing the Services;
- The Bidder's plan for quality control;
- The location where Services for the County will be performed.
- Favorable references;
- The ability of the Bidder to comply with the requirements of the RFB; and
- The dollar amount of the bid.

The Treasurer will also evaluate whether a contract for Services in only 2023 or Services in 2023 plus Services in any combination of years 2024 and 2025 is best for the Treasurer and County and make a recommendation on that issue to the Board. The Treasurer will further evaluate any alternate Bids and make a recommendation on whether to award any alternate Bid to the Board. Based on his/her evaluation, the Treasurer will rank the Bids according to lowest and best. He will then develop and make a recommendation to the Board.

8.3.C Phase III - Selection by Board

The Board shall award the Contract to the Bidder deemed to have submitted the lowest and best bid, as determined solely by the Board and/or its representative(s). The Board collectively reserves the right to reject any and/or all bids, or any portion of any and/or all bids, to waive informalities or irregularities that do not affect the substance of the specifications and contents of the Legal Notice, RFB, and the Contract, and to award the Contract in the manner deemed to be in the best interest of the Board, the Treasurer, and Delaware County, Ohio.

Bidders may be requested to make a presentation to the Board to explain their Bid and to answer any questions.

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8.4 Award

The Contract will be awarded as follows:

- A. Except as otherwise provided in the Contract Documents, ALL BIDS OPENED SHALL BE FINAL. There shall be no oral interpretations of Bids from the floor.
- B. Upon review of the Bids, the Board shall either: (a) reject any or all bids or any portion of any or all bids; or (b) award the Contract to the lowest and best Bidder as solely determined by the Board and/or its representative(s).
- C. The Bid amount for Services for 2023 or Services for combined years (2023+2024 **OR** 2023+2024+2025), which ever term is determined, solely by the Board, to be the term of the Contract is the amount that shall be considered in awarding the Contract.
- D. The Board, in its sole discretion, shall determine the term of the Contract. Award may, in the sole discretion of the Board, be for Services in only 2023 or Services in 2023 plus Services in any combination of years 2024 and 2025.
- E. The Board, in its sole discretion, may or may not award any alternate Bid and shall determine whether to award for any Alternate Project. The Board, in its sole discretion, reserves the right to award to the winning Bidder any alternate Bid.
- F. The Board shall award the Contract to the Bidder deemed to have submitted the lowest and best bid, as determined solely by the Board and/or its representative(s). The Board reserves the right to reject any and/or all bids, or any portion of any and/or all bids, to waive informalities or irregularities that do not affect the substance of the specifications and contents of the Legal Notice, RFB, and the Contract and to award the Contract in the manner deemed to be in the best interest of the Board, the Treasurer, and the County.
- G. The Board reserves the right to consider all elements entering into the question of determining the qualifications and responsibility of the Bidder, his or her agent(s), or representative(s). Any Bid which, in the judgment of the Board, is incomplete, conditional, obscure, or which contains irregularities that affect the substance of the specifications and contents of the RFB, may be rejected.
- H. Upon execution of the Contract, the Board shall return, in a timely manner, the bid security of all unsuccessful Bidders. The Contractor's bid security will be returned upon execution of the Contract by the Board.
- I. The Contract shall be in writing.
- J. The Contract shall be in the form included in this RFB.

8.5 Reservation of Rights

The Board reserves the following rights in relation to any submitted Bid and/or the Contract:

- A. The right to disqualify any Bid that takes Exception to or limits the rights of the Board.
- B. To refuse any Bid not properly submitted in accordance with the requirements of this RFB.
- C. To reject Bids submitted with incomplete Bid documents or forms.
- K. To determine the term of the Contract. Award may, in the sole discretion of the Board, be for Services in only 2023 or Services in 2023 plus Services in any combination of years 2024 and 2025.
- D. To award for any Alternate Project. The Board, in its sole discretion, reserves the right to award to the winning Bidder any alternate Bid.
- E. To reject the selected Bid and/or other Bids at any time prior to the Board's execution of the Contract.
- F. The right to cancel this RFB at any time.
- G. To reduce the scope of Services required herein and to negotiate the price to reflect such change after award of the Contract.

8.6 Investigation

The Board or Treasurer may make such investigations as deemed necessary by the Board to determine the ability of the Bidder to perform the work required by the Contract Documents.

8.7 Mathematical Error

In the case of a bid being substantially lower than other bids as the result of a mathematical or clerical mistake by a Bidder in preparing its bid, as opposed to a judgment mistake, the Board may, prior to award of a contract, reject such a bid upon presentation of a petition from the Bidder accompanied by a sworn affidavit of error setting forth the error, the cause thereof, and sufficient evidence to substantiate the same as a mathematical or clerical mistake and not a mistake of judgment. The petition must be made in writing and filed with the Treasurer within two (2) business days after the bid opening.