



REQUEST FOR PROPOSAL

UTILITY BILLING SERVICES

RFP NO. 201516-03

September 21, 2015

I. INSTRUCTIONS AND CONDITIONS

A. No bid proposal will be considered for award unless submitted in the bid format described in this Request for Proposal (RFP). The bid must be fully complete and executed. Bidders shall send four (4) copies of the completed proposals which will include; three (3) bound copies and one (1) unbound original with a copy of this RFP attached to the front of each proposal, with appropriate responses included.

Format: Proposal should be 8 ½ x 11 inches, printed two-sided on recycled paper with removable bindings, bound in a single document. Binding can be as simple as a staple. Original and copies may be submitted in one envelope/package.

Each bid proposal, consisting of the original and copies as directed above, must be submitted in a sealed envelope addressed to Becky McCurdy, Procurement Services Manager, City of Madera, Purchasing-Central Supply, 1030 South Gateway Drive, Madera, California 93637, and delivered prior to the time and date specified in this document. Each sealed envelope containing a bid proposal must have, on the outside, the name of the bidder, bidder's address and the statement "DO NOT OPEN UNTIL THE TIME OF BID OPENING" and in addition, must be plainly marked on the outside as follows:

Bid: UTILITY BILLING SERVICES

RFP No. 201516-03

Filing Deadline: Wednesday, November 11, 2015 - 3:00 P.M.

B. Attention of bidders is especially directed to the specifications which, in addition to the bid proposal and these instructions, are basis for evaluation and will be part of any agreement with the successful bidder. Any deviations from the specifications in this notice shall be proper reason for rejection of all or any part of the bid proposal.

C. The City reserves the right to reject or accept any or all bids or parts thereof, and to accept or reject the alternatives individually or jointly, for any reason.

D. The City reserves the right to consider any minor deviations from the specifications and determine the acceptance or rejection of such deviation. The City reserves the right to seek supplementary information from any bidder at any time after official proposal opening and before the award. Such information will be limited to clarification or amplification of information requested in the original proposal.

E. The City of Madera recognizes its policy of providing equal opportunity to all qualified Persons and hereby notifies all bidders that it encourages all bidders to take active race/gender-neutral steps to include Disadvantaged Business Enterprises in this and other City of Madera agreements. Disadvantaged Business Enterprises will be afforded full opportunity to submit bids in response to this invitation. Bidders will not be discriminated against on the grounds of race, color, religious creed, sex or national origin in consideration for award.

F. The City reserves the right to modify this RFP at any time. In the event it becomes necessary to modify or revise the RFP, a written amendment or addenda issued by City's Purchasing-Central Supply Division is the only method which should be relied on with respect to changes to the RFP. Bidder is responsible to contact City's Purchasing-Central Supply Division prior to submitting a bid to determine if any amendments were made to the RFP. Documents, amendments, addenda, etc. will be posted to the City website at www.madera-ca.gov on the Purchasing Department tab, the Bid Announcement and Results page.

The City will not be responsible for verbal responses made by any parties including the designated contact and/or their designee. Before an award is made, any contact with City staff regarding this RFP, other than the designated contact or their designee(s), without prior written authorization is strictly prohibited and may render the bidder non-responsive.

No questions or inquiries regarding this RFP should be directed to any individual(s) at the sites detailed in this document. All inquiries should be submitted in writing per the process described in this document.

Questions and suggestions concerning the RFP must be submitted in writing no later than 3:00 p.m. Wednesday, October 28, 2015. Written questions or inquiries should be emailed, mailed or faxed to:

Becky McCurdy
Procurement Services Manager
City of Madera
Purchasing-Central Supply

1030 S. Gateway Drive
Madera, CA 93637

rmccurdy@cityofmadera.com

FAX: (559) 661-0760

G. Proposals will be evaluated by the City. If a bid proposal is found to be incomplete or not in compliance with the format required, it will not be submitted for evaluation. During the evaluation process, the City may find it beneficial to request additional information. The City may request an interview with the top rated companies. A reference check may also be conducted.

H. Any proposal may be withdrawn at any time prior to the hour fixed for the opening, provided that a request in writing executed by the bidder or their duly authorized representative, for the withdrawal of such proposal is filed with Purchasing-Central Supply. The withdrawal of a proposal shall not prejudice the right of a bidder to file a new proposal prior to the time and date set for the opening. After the expiration of the time and date for receipt of proposals, a proposal may not be withdrawn or altered.

I. The City reserves the right to seek supplementary information from any bidder at any time after official proposal opening and before the award. Such information will be limited to clarification or amplification of information asked in the original proposal.

J. Issuance of the RFP and receipt of proposals does not commit the City to award an agreement. The City reserves the right to postpone the RFP process for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with other than the selected company should negotiations with the selected company be terminated, or to cancel any section of this RFP. The City also reserves the right to apportion the award among more than one company.

K. An award under this RFP will not be based solely on the lowest price. If an award is made, it will go to the bidder(s) with the best overall proposal. The successful proposal will be competitively priced and provide for adequate service to meet the City's needs.

L. An award will be made as soon as possible after the opening of bids. Bid proposals shall remain valid for at least ninety (90) days after the opening of bids. No bid proposal may be withdrawn after the bid opening.

M. It is the City's intent to award a single Contract for the work described. The City reserves the right to award a contract, or make no award, whichever is in the best interests of the City. The City also reserves the right to negotiate the terms and conditions of the contract resulting from this solicitation. The term of the contract

will be for 2 years with three additional 1 year options. Each extension of the contract is subject to the review and recommendation of the City, the satisfactory negotiation of terms (including a price acceptable to both the City of Madera and the selected firm), and annual availability of an appropriation. The successful bidder shall enter into a formal agreement with the City which will be very similar in content to Attachment B: Draft Agreement which is provided for information purposes only and to help clarify City intent relevant to this RFP.

N. It is the City's policy to encourage the purchase of supplies, services, and equipment from vendors located within the boundaries of the City. Local vendors are sellers, vendors, suppliers and contractors who maintain places of business located within the limits of the City and who have a current City of Madera business license.

Bidders will, to the greatest extent feasible, attempt to incorporate local area businesses as subcontractors and suppliers. Bidders will provide documentation of current use of local vendors and upon request, provide records showing ongoing outreach efforts made to local businesses to demonstrate that they have made a reasonable effort to inform local businesses of the opportunity.

The local vendor outreach policy shall not apply to those agreements where State or Federal law, or other laws or regulations preclude such a preference.

O. Each bidder shall carefully examine each and every term of this RFP; and each bidder shall judge all the circumstances and conditions affecting their bid. Failure on the part of any bidder to make such examination and to investigate thoroughly shall not be grounds for any declaration that the bidder did not understand the conditions of this RFP.

P. Bidder's Proprietary information: Upon award, all documents provided by the successful bidder shall become public record. All documents provided by any bidders, other than the successful bidder, shall become public record in their entirety and subject to disclosure, unless said documents are retrieved by the bidder within ten (10) business days of the award. This shall also include, but is not limited to documents for projects for which all proposals are rejected and projects for which an award is not made for any reason. In the event that one or more proposals are returned to the bidding parties, it is the intent of the City that such documents shall not become public records of the City unless required by the California Public Records Act or other provision of law.

Q. Any Federal or State of California License/Certification/Contractors License required to provide the services and a Certificate of Insurance in accordance with Attachment C: Insurance Requirements for Construction and Service Contracts.

Service provider, his agents, representatives, employees and subcontractors shall maintain current and appropriate vehicle operator licenses for any vehicle operated

within the scope of this Agreement.

R. The City intends that other public agencies (county, special district, public authority, public agency, school district or other political subdivision of the state of California) shall have the option to participate in any agreement created because of this Invitation for Bid. The City of Madera shall incur no financial responsibility in connection with a purchase order from another public entity. Vendor's agreement or failure to agree to the "piggyback" agreement will not be a factor in the award. This piggyback will remain available for one year from the date of the Bid award.

Check one of the following:

- i. ☐ Agree to extend all prices, terms, and conditions of my proposal to any other public agency located in the State of California with no exceptions.
- ii. ☐ Agree to extend all prices, terms, and conditions of my proposal to any other public agency located in the State of California with the following exceptions noted, as attached.
- iii. ☐ The Vendor does not agree to extend pricing, terms and conditions in our Bid to any other agency.

S. All expenses associated with the preparation and submission of a proposal to the City shall be the sole financial responsibility of the proposer.

II. SPECIFICATIONS

General Information

The City of Madera is requesting proposals from qualified vendors to provide utility bill printing services including preparation and mailing.

The work performed under this contract consists of, but is not limited to, the preparation of City utility bills to include the Residential and Commercial monthly bill printing and mailing services as outlined in the specifications. On occasion there may be additional items to be processed that may be included with the utility bills. The City is seeking proposals for a two-year agreement with an option to renew annually thereafter upon mutual consent, not to exceed a total of five (5) years.

III. SCOPE OF WORK TO BE PERFORMED

Bidders shall be responsible for:

- A. Entire printing cost of bills including all set-up and preparation costs.
- B. Mail preparation, Zip Code sorting, and postal permit costs. Note: Vendor will bill actual postage to the City.
- C. Price submitted (cost/piece) shall include all materials, storage and labor costs as necessary to complete project herein, to include but not limited to: printing bill, mailing envelopes and response envelopes as specified below.
- D. Monthly bill (sample is provided at Attachment D).
1. The preprinted invoice template needs to be in black ink printed on 20# 8.5" X 11" white paper with the lower 1/3 to be used by the customer when making payment. The actual billing information is to be printed in black ink from a billing file provided by the City with "Past Due" information printed in red.
 2. Vendor must be able to process, print and mail invoices within forty-eight (48) hours after receiving the billing file excluding weekends.
 3. Vendor is to provide:
 - a. invoice paper stock (logo and headings in black ink).
 - b. #9 return envelope (pink paper).
 - c. #10 white window envelope with printed city logo and return address and with use of vendors bulk mail permit.
 4. Approximate # of monthly invoices is currently 14,000.
- E. General Information
1. Invoices will need to have room to print a message which can vary from billing to billing.
 2. Vendor will be required to allow for changes if services are added or deleted.
 3. Billing file format will be comma delimited ASCII files.
 4. Each billing record will contain Zip+4 as provided from the USPS files.
 5. Preprinted stock must be available for purchase by City when needed for any bills created in house.

Overall size of finished bills shall be 8 1/2" X 11" which shall be folded and inserted in a #10 white window envelope along with a #9 (pink colored paper as stated

above) business reply envelope for customer use. The resulting package shall meet all postal regulations.

From time to time the City may require that additional inserts be added to the Utility Bill. These inserts will be provided to vendor in a format such as a PDF file or Word document or other format acceptable to City and vendor. City will pay additional fees resulting from those inserts based on the bid provided.

IV. PROPOSAL CONTENT INSTRUCTIONS

Please submit four (4) hard copies of your proposal to the City of Madera which will include; three (3) bound copies and one (1) unbound original with a copy of this RFP attached to the front of each proposal. Please keep your proposal as concise as possible. The proposal must contain the information below. To easily rate your proposal; please format your response to coordinate with the numbering system outlined below. For example, section #1, would be your firm's Transmittal Letter, section #2 would contain the Bid Proposal Authorization Form.

1. Each proposal shall include a transmittal letter with the firm's address, telephone number, e-mail address. The transmittal letter should be signed by a legally authorized representative of the company, briefly stating the proposer's understanding of the work to be done, the commitment to perform the work within the time period, a statement why the firm believes itself to be best qualified to perform the services.
2. Bid Proposal and Authorization Form. Vendor must use the format provided by the City and all blank spaces must be filled. Pricing information is to be submitted on the Bid Proposal and Authorization form or as an attachment to the form. The signature shall be longhand.
3. Each bidder shall provide three references. (Regarding references, bidders shall determine prior to including the references in the proposal that the references are relevant, contact information is accurate, and reference contact has agreed to provide a complete and uncensored testimony.) References provided without accurate contact information will not be considered.
4. Each bidder may, but is not required to, include additional references, resumes and any other materials deemed necessary but not provided otherwise (such as promotional literature, etc.). Note that these materials may or may not be reviewed by all evaluators and may not be part of the official evaluation except to the extent they support qualifications and experience.
5. List all exceptions to the bid documents by reference to the page number. If applicable, include any cost associated with the exception in this section. Exceptions may result in bid rejection. A Vendor deviating from

specifications must specify any and all deviation(s). Failure to note said exceptions shall be interpreted to convey that the Vendor shall perform in the manner described and/or specified in this bid solicitation. If exception(s) are taken or alternatives offered, complete descriptions must be shown separately. If no exceptions are taken write "none."

V. EVALUATION PROCESS

A. Review of Proposals

An evaluation team will be assembled by the City. Each evaluator will first score each proposal by each of the criteria described below. The evaluation will then convene to review and discuss these evaluations and to combine the individual scores to arrive at a composite score for each firm. Ranking will be assigned based on the composite score.

B. Evaluation Criteria

Proposals will be numerically scored and ranked using the criteria and weighting described in this section. The scores assigned will reflect the extent to which criteria is fulfilled relative to other proposals. The evaluation criteria and maximum score that can be achieved for each criterion are presented as follows:

Evaluation Criteria and Maximum Evaluation Score

Criteria	Maximum Evaluation Score
Ability to meet the stated requirements including adequacy of proposed staffing, techniques and procedures	20
Past Performance and Experience with emphasis on comparable government experience	20
Conformance to terms of RFP in preparing and submitting the proposal	10
Implementation Plan	15
Cost Proposal Rates	35
Total Maximum Score	100

The City reserves the right to act in the best interest of the City and its residents and businesses, including the right to reject a proposal that is given the highest quantitative scoring in the evaluation process if the proposal is not in the best interest of its residents and businesses.

VI. NEGOTIATION

The City of Madera shall reserve the right to negotiate any terms and conditions of the RFPs received, with the final candidate prior to acceptance/rejection of said proposals. Upon determination of the highest ranked Bidder, staff will commence negotiations with the firm that received the highest ranking. The negotiations will be conducted in accordance with City of Madera policies and procedures. When negotiations are successfully concluded, staff will present their recommendation to the City Council.

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Note: This entire packet should be returned with the bid.