



*An Innovative  
Outsourcing Partner*



Anaheim, CA | Ft. Worth, TX | Downers Grove, IL | Ft. Myers, FL | Haverhill, MA

## InfoSend, Inc. Response to:

City of Lauderdale, FL  
RFP 2026-025  
UTILITY BILL PROCESSING SERVICES

**Due:** March 24, 2026

**Time:** 2:45 PM EST

**Prepared by:** Marty Bielecki  
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800.955.9330 | [infosend.com](https://www.infosend.com)



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March 24, 2026

City of Lauderhill, FL

Re: RFP 2026-025 - UTILITY BILL PROCESSING SERVICES

To the Review Team:

InfoSend, Inc. is pleased to present this response to the City of Lauderhill, FL. InfoSend, Inc., founded in 1996, is a privately held California corporation with a mission to provide the best possible Customer Communications Management (CCM) platform while still maintaining a client-focused company culture. Now delivering more than 300 million print and electronic documents annually across multiple channels, InfoSend proudly maintains an industry best client retention and satisfaction rate.

InfoSend has never accepted investment from Private Equity or Venture Capital firms. The company was founded with capital provided by its CEO, and all growth since has been funded through bank financing and reinvested profits. This consistent ownership structure has given our clients a uniquely stable, long-term partner.

For more than 30 years, our focus has been delivering high-quality service and support that foster enduring client relationships. While many competitors pursue rapid market share by pricing services at or near cost—only to later sell to investment firms—InfoSend has taken a different path. We offer competitive yet sustainable pricing, ensuring quality service, minimal risk of ownership change, and protection from the service declines that often follow cost-cutting by new owners.

InfoSend provides a comprehensive outsourced bill printing, mailing, and eBilling/payments setup to over 900 clients nationwide. InfoSend's team is confident that our offering and benefits presented herein will provide the City of Lauderhill and its customers with the greatest value in the market today. InfoSend meets or exceeds the requirements specified in the scope of work, and additional to quoting services pertaining to the requirements we have also included supplemental information about our processing setup, data security, and bill print/mail solution. We propose to provide the City of Lauderhill's print and mail services from our InfoSend Florida facility without the use of subcontractors for any portion of the production, including disaster recovery. InfoSend has five production facilities strategically positioned across the country and has provided detail on each location in this response document.

#### Key Advantages of InfoSend

- **Company culture prioritizes client satisfaction, leading to industry best client retention and satisfaction rate.**
- **Over 230 employees across multiple states**, with high employee retention ensuring clients are handled with consistent knowledge and care.
- **Wholly owned and operated out of 5 regional production facilities.** We never use subcontractors to sub excess printing volume out to other vendors.
- **Modern Electronic Billing, Payment and Presentment platform, with PCI-Level 1 certification, IVR and SMS.**
- Specializes in supporting more than **700 utility clients nationwide**, out of our **900+ clients**.
- **InfoSend is CIS agnostic** and has interfaced with more than **50 different CIS platforms, including Tyler Technologies CIS.** InfoSend has extensive expertise in implementing and supporting clients operating Tyler Technologies and has **over 130 clients currently operating on a Tyler platform.**
- **30+ 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.
- **We manufacture our own #10 outgoing and #9 return envelopes.**

- **Capacity to handle both high-volume and low-volume**, specialized print and mailing requests with fast turn-around times.
- **PCI DSS Level 1 Compliant and SOC 2 Type I & II Audited as well as other regulatory compliance.**

### 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 30 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.

InfoSend's Customer Communications Management (CCM) platform distributes critical documents across multiple channels, including InfoSend's own manufacturing environments in Texas, California, Illinois, Florida and Massachusetts for Data Processing, Printing and Mailing (DPPM). InfoSend's hosted Electronic Billing, Presentment and Payment (EBPP) applications drive the customer remittance process with web, IVR, SMS and Bank BillPay payments. The cloud-based, Software as a Service (SaaS) approach allows InfoSend to refine offerings without client-side installed software or maintenance, as well as providing for flexible integrations to existing systems or vendors.

InfoSend is capable and eager to meet the requirements as laid out in this proposal, leveraging our experience and focus on client satisfaction. Further, the commitment to evolving the services ensures that a partnership with InfoSend will help your organization evolve with the continually changing landscape of consumer communication, interaction, and payments.

Thank you for the opportunity.



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President  
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Anaheim, CA 92807



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13891 Jetport Loop #15  
Fort Myers, FL 33913

# TAB #1 – Proposer’s Qualification Statement

## ATTACHMENT “A” PROPOSER’S QUALIFICATIONS STATEMENT

PROPOSER shall furnish the following information. Failure to comply with this requirement will render Bid non-responsive and shall cause its rejection. Additional sheets shall be attached as required.

PROPOSER'S Name and Principal Address: InfoSend, Inc.  
4240 E. La Palma Ave. Anaheim, CA 92807

Contact Person’s Name and Title: Marty Bielecki - Sales Executive

PROPOSER'S Telephone and Fax Number: Phone: 239.247.4419 | Fax: (714) 993-1306

PROPOSER’S License Number: BUS2011-00180  
(Please attach certificate of competency and/or state registration.)

PROPOSER’S Federal Identification Number: 33-0748516

Number of years your organization has been in business, in this type of work: 30

Names and titles of all officers, partners, or individuals doing business under trade name:

- Mahmood Rezai - CEO
- Russ Rezai - President
- Roxana Weil - Executive Vice President

The business is a: Sole Proprietorship  Partnership   
Corporation

Name, address, and telephone number of Surety Company and agent who will provide the required bonds on this contract:  
Marsh & McLennan Insurance Agency LLC

1 Polaris Way | Suite 300 | Aliso Viejo, CA 92656 | T: +1 949 900 6959 | F: +1 858 452 7530

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Have you ever failed to complete work awarded to you; If so; when, where and why?

InfoSend, Inc. has never failed to complete any awarded work and/or contracts due to noncompliance.

Have you personally inspected the proposed WORK and do you have a complete plan for its performance?

Yes.

Will you subcontract any part of this WORK? If so, give details including a list of each sub-contractor(s) that will perform work in excess of ten percent (10%) of the contract amount and the work that will be performed by each subcontractor(s).

No. InfoSend is a full-service provider of all the required services. Subcontractors will not be required or used.

The foregoing list of subcontractor(s) may not be amended after award of the contract without the prior written approval of the Contract Administrator, whose approval shall not be reasonably withheld.

List and describe all bankruptcy petitions (voluntary or involuntary) which have been filed by or against the Proposer, its parent or subsidiaries or predecessor organizations during the past five (5) years. Include in the description the disposition of each such petition.

N/A: InfoSend has had no voluntary or involuntary bankruptcy petitions during the past five (5) years.

List and describe all successful Bond claims made to your surety (ies) during the last five (5) years. The list and descriptions should include

claims against the bond of the Proposer and its predecessor organization(s).

No successful bond claims have been made to our sureties during the last five (5) years.

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List all claims, arbitrations, administrative hearings and lawsuits brought by or against the Proposer or its predecessor organizations(s) during the last (5) years. The list shall include all case names; case, arbitration, or hearing identification numbers; the name of the project over which the dispute arose; and a description of the subject matter of the dispute.

N/A

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List and describe all criminal proceedings or hearings concerning business related offenses in which the Proposer, its principals or officers or predecessor organization(s) were defendants.

N/A

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Has the Proposer, its principals, officers, or predecessor organization(s) been CONVICTED OF a Public Entity Crime, debarred, or suspended from bidding by any government during the last five (5) years? If so, provide details.

N/A

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The PROPOSER acknowledges and understands that the information contained in response to this Qualification Statement shall be relied upon by CITY in awarding the contract and such information is

warranted by PROPOSER to be true. The discovery of any omission or misstatement that materially affects the PROPOSER'S qualifications to perform under the contract shall cause the CITY to reject the Bid, and if after the award, to cancel and terminate the award and/or contract.

Russ Rozai, President

By

  
(Signature)

# TAB #2 – Statement of Capabilities

Provide a narrative that explains why your firm is best qualified to deliver the required services.

## Get to Know InfoSend - A Reliable Partner

InfoSend, founded in 1996, is a privately held California corporation with a mission to provide the best possible Customer Engagement solution while still maintaining a client-focused company culture. Now delivering more than 300 million print and electronic documents annually across multiple channels, InfoSend proudly maintains an industry-best client retention and satisfaction rate.

- Privately held corporation, founded in 1996 and headquartered in Anaheim, CA.
- Provider of Customer Engagement solutions to distribute critical communications and receive payments from customers across multiple channels.
- Company culture and business practice prioritizes client satisfaction, leading to an industry-best client retention and satisfaction rate.
- Utilizes a Software as a Service (SaaS) approach.
- Customer Communications Management (CCM) solutions, with secure and owned Print and Mail manufacturing environments in CA, TX, IL, FL and MA.
- Electronic Billing, Payment and Presentment (EBPP) solutions, with paperless billing, web, IVR, SMS and Bank BillPay payments.
- More than 300 million print and electronic documents distributed annually.
- Over 230 employees across multiple states, with high employee retention ensuring clients are handled with knowledge and care.

InfoSend has provided business process outsourcing services since 1996, handling the processing and distribution of over 300 million critical documents annually for industries throughout the United States. Utilizing the most current technology, InfoSend's Customer Engagement platform offers a single source provider to reach customers with effective and timely interactions.

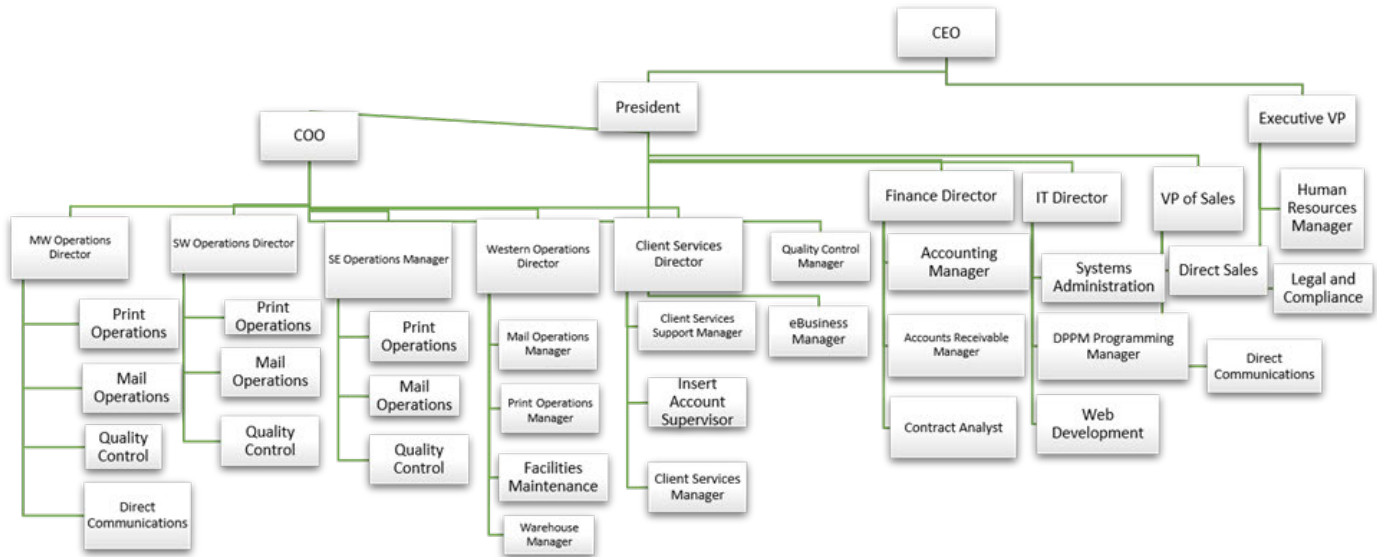
InfoSend's Customer Communications Management (CCM) platform distributes critical documents across multiple channels, including InfoSend's own manufacturing environments in California, Texas, Illinois, Florida and Massachusetts for Data Processing, Printing and Mailing (DPPM). InfoSend's hosted Electronic Billing, Presentment and Payment (EBPP) applications drive the customer remittance process with web, IVR, SMS and Bank BillPay payments. The cloud-based, Software as a Service (SaaS) approach allows InfoSend to refine offerings without client-side installed software or maintenance, as well as providing for flexible integrations to existing systems or vendors.

Integrity is at the core of InfoSend, with a goal to retain and provide complete satisfaction for each client. InfoSend has over 230 employees across multiple states, and the company culture has led to high employee retention, affording clients familiarity and quality service. From our internal operations, to how we support our valuable clients, InfoSend's client-focused service has led to an industry-leading client retention and satisfaction rate.

# TAB #3 – Proposal / Project Approach

Submit an outline of the elements and organizational structure of the team established to manage the project. This is to include the administrative operation and key personnel and their area of responsibility.

## InfoSend Organizational Chart



### Executive Management and Sales:

**InfoSend designated Contract Administrator:** Russ Rezai, President

**InfoSend designated Contract Manager:** Matt Schmidt, COO

**InfoSend Sales Contact:** Marty Bielecki, Sales Executive

### 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.

**Primary Account Manager: Bob Woods**

**Primary Developer: Alicia Tsang**

**Secondary Account Manager: Audra Maxwell**

**Secondary Developer: Jeffrey Chiu**

### **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 City's contract, we will at that point assign a dedicated Account Manager to work with the City on the implementation project. This Account Manager will remain the City's main point of contact throughout the implementation and will also be available after go-live for ongoing maintenance or improvement projects.

## **2. Describe your methodology for managing the contract, including: Program administration and scheduling, Communication processes, Customer service and complaint resolution, Training, supervision, and performance management of staff, any challenges encountered in similar projects and how they were resolved**

### **InfoSend Implementation**

InfoSend's client-focused service and industry-leading client retention rate starts with a successful implementation. Since 1996 InfoSend has continually refined the implementation process to ensure clients Go-Live occurs expeditiously and without error.

All InfoSend implementations have 4 key phases.

1. **Requirements Gathering**
2. **Application Build**
3. **User Acceptance Testing (UAT), Samples, Parallel Testing, and Training**
4. **Go-Live and Follow Up**

#### **Requirements Gathering**

The project is started with a dedicated Account Manager assigned to the project. The Account Manager acts as the primary point of contact with clients while working with all internal InfoSend programming and operations staff, and will chair a recurring (often weekly) implementation meeting with the client's key staff. InfoSend, as a cloud-based solutions provider, engages clients in implementation and support via phone, email and web-based tools, including web-browser screen sharing. All setup, training and request tracking is provided virtually using industry standard tools. Critical communications sent to or received from clients during the implementation are centrally archived in the InfoSend CRM system, ensuring all aspects are documented and the implementation can continue should the primary resources be out of the office.

The Account Manager establishes key milestones and completes standardized steps in the InfoSend implementation plan. The process includes requirements gathering and analysis of the application to be developed, including a data mapping exercise, resulting in a Statement of Work (SOW) for client approval.

#### **Application Build**

Once the SOW is approved, the application undergoes development and configuration. Prior to completion of development, the application is reviewed by a secondary Account Manager or member of the IT management group to ensure that no task was left undone or done incorrectly. Sample output is produced and checked by InfoSend Quality Control; automated Quality Control methods are configured within processing.

#### **Samples, Parallel Testing, and Training**

During the last phase of the implementation, output and application web access is provided to clients for User Acceptance Testing (UAT). Once the application build is validated and accepted by the client, the application is put into Parallel Testing mode. During this time clients are encouraged to transfer copies of live data to InfoSend to be automatically processed and output for review, simulating go-live. Clients check the web application and output to ensure that it is satisfactory and any requested revisions will be completed before go-live. Any payment related applications are tested to ensure payment deposits are received and reconciled. Clients are also trained on how to use InfoSend tools and reporting to support the application at this time.

The hour-long, web-based training covers:

- File uploads
- Sample review and approval
- Managing document messages and insert requests
- Accessing archived reports

- Managing User Permissions
- Performing research and support for customer activity
- Payment reconciliation (for payment applications)
- Submitting, viewing and closing support requests

### Go-Live and Follow Up

Go-Live of the application includes an "all-hands" approach, with all key InfoSend managers required to review the launch day activity and sign off before application output is final. After Go-live, your Account Manager performs a post go-live follow up to ensure client satisfaction.

### InfoSend Data Processing, Print and Mail Project Plan

Based on previous experience with Clients of similar size and structure, the following timeline has been provided for project implementation. The implementation timeline begins once the contracting phase has been completed and InfoSend has received test files and mockups from the Client. Receipt of the test files and mockups will allow the Account Manager to begin the technical implementation.

**\*\* InfoSend is the incumbent vendor providing service to the City of Lauderhill and the City has been utilizing InfoSend's services for several years. We are providing an example implementation timeframe since it was requested. Since City of Lauderhill is already live an implementation will not be needed \*\***

This is only a sample 12-week timeline and assumes the Client will be attending weekly meetings and remaining responsive in providing deliverables necessary to complete the project.

Milestone: Requirements Gathering   Weeks 1-3	Responsibility
Kick-Off Meeting: Familiarize each party with the project managers assigned to the implementation	InfoSend & Client
Kick-Off Meeting: Review, confirm and discuss the client specifications and requirements	InfoSend & Client
Kick-Off Meeting: Discuss requested formatting changes to client output	InfoSend & Client
Kick-Off Meeting: Begin development of mockups incorporating client feedback	InfoSend
Kick-Off Meeting: Fill out Standardized Client Installation Checklist	InfoSend
Kick-Off Meeting: Begin to discuss data processing details and data mapping in correlation to mockup	InfoSend & Client
Follow Up: Finalize any open items on the Client Installation Checklist	InfoSend
Follow Up: Review mock-ups via online meeting to incorporate Client feedback in real-time	InfoSend & Client
Follow Up: All Client deliverables received and documented, access to web applications	Client
Follow Up: Continue gathering data processing details and developing programming logic	InfoSend
Follow Up: Provide proofs for custom preprinted form and envelope (if applicable)	InfoSend
Finalize: Approve InfoSend document mockups	Client
Finalize: InfoSend will present the Client with a formal Statement of Work (SOW) which captures all requirements for the implementation project and production of outputs.	InfoSend
Finalize: Client reviews SOW and requests changes/clarification on any relevant items.	Client
Finalize: Client approves the SOW, Requirements Gathering complete	Client
Milestone: Application Build   Weeks 4-7	
Development: InfoSend Account Manager meets internally with the InfoSend programming team to execute application per the SOW	InfoSend
Development: Application Development Begins	InfoSend
Development: As needed, InfoSend Project Manager verifies additional requirements with Client	InfoSend &

	Client
<b>Development: Internal Testing and Review of Applications is completed by Project Manager</b>	InfoSend
<b>Development: Internal Development Checklist reaches 100%</b>	InfoSend
<b>Go-Live Planning: Finalize Go-Live schedule, with relevant dates based on Client billing cycle schedule and staff availability for training</b>	InfoSend & Client
<b>Go-Live Planning: Production web application access provisioned</b>	InfoSend
<b>Milestone: User Acceptance Testing (UAT), Training, Go-Live Coordination   Weeks 8-11</b>	
<b>UAT: InfoSend provides first set of samples for review</b>	InfoSend
<b>UAT: Client reviews the output samples and provides feedback to your Account Manager about requested changes</b>	Client
<b>UAT: Client feedback is communicated to InfoSend's development team for incorporation into the outputs</b>	InfoSend
<b>UAT: Begin payment/lockbox/other ancillary testing (if applicable)</b>	InfoSend & Client
<b>UAT: Additional rounds of sample review are conducted for the outputs during weekly meetings</b>	InfoSend & Client
<b>UAT: Final round of changes are conducted for the outputs</b>	InfoSend
<b>UAT Complete: Provide final approval on the outputs</b>	Client
<b>UAT Complete: Provide confirmation of payment/lockbox/other ancillary testing completed</b>	Client
<b>UAT Complete: Review Statement of Work (SOW) during weekly meeting and confirm all requirements met</b>	InfoSend & Client
<b>Training: Conduct training for Client staff on InfoSend systems and application management</b>	InfoSend & Client
<b>Go-Live Coordination: Begin parallel testing of application, including any automation scripts</b>	InfoSend & Client
<b>Go-Live Coordination: Complete parallel testing of application</b>	InfoSend & Client
<b>Go-Live Coordination: Internal Go-Live readiness checklist completed by Project Team and Management</b>	InfoSend
<b>Milestone: Go-Live   Week 12</b>	
<b>Go-Live: Receive and process first live file for distribution</b>	InfoSend
<b>Go-Live: Internal "First Live Run" Checklist completed, with review and signatures required from each department manager</b>	InfoSend
<b>Follow Up and Support: Continue weekly meetings to cover additional questions or training until client satisfaction</b>	InfoSend & Client

## Services Overview

InfoSend is a client-focused provider of comprehensive Customer Engagement and Billing solutions.

- **Single Source Vendor:** InfoSend provides a comprehensive set of solutions to manage the interaction with customers online and with printed materials.
- **Customer Communications Management (CCM) Platform:** Multi-channel distribution of documents through USPS, eBilling, Mobile, Online Hosted Archive, API, FTP, Bank Networks and more.
- **Electronic Billing, Payment, and Presentment (EBPP) Platform:** Online Customer Engagement with web, IVR and SMS notifications and payments. All solutions are mobile-ready, with PCI-Level 1 certification so clients avoid third-party audits.
- **Dynamic Customer Messaging:** Automated and ad hoc targeted customer messaging capabilities, with dedicated Direct Communications department for production and distribution of marketing, informational inserts, postcard and special mailings.
- **Data Processing, Print, and Mail (DPPM) Environment:** Nationwide, secure manufacturing environments that maintain accuracy, reliability, USPS compliance and postage savings.

- **Secure and Compliant:** InfoSend's process design and operating environment are maintained and audited against strict standards to protect client and customer privacy.

## InfoSend Client Services Support

InfoSend's Client Services department provides web, phone and email support channels for clients, with dedicated support staff available to resolve client requests. Support staff is trained to monitor, analyze, escalate and respond to incoming requests, as well as provide proactive support in the event internal Quality Control procedures detect issues with client data.

- Dedicated Account Manager from implementation also assigned to monitor and provide support.
- Dedicated Support Staff for reviewing and responding to incoming issues.
- Multiple communication channels available for client preference: web support ticketing tool, email, and phone.
- Proactive support initiated by InfoSend staff when client data issues are detected by InfoSend Quality Control processes.
- Issues tracked via InfoSend CRM tool, ensuring full resolution before the ticket can be closed.

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. The following describes InfoSend's standard support coverage, the services that are included as part of annual software support, a listing of call priorities and an outline of escalation procedures.

InfoSend offers emergency an after-hours support line. An after-hours answering service is available 24/7/365. The answering service contacts InfoSend employees sequentially until one receives and acknowledges the call. Requests can be answered within 4 hours. InfoSend provides escalation phone number and contacts during the implementation. After-hours support may be billable. Please note, with the extensive support hours and support channels available, the after-hours answering service being used is extremely rare. Please see typical support channels overview below:

### Support Channels and Availability

InfoSend provides the following methods to be reached to initiate a support request:

- 800 Toll-Free Telephone support: (800) 955-9330
- Email via [support@infosend.com](mailto:support@infosend.com)
- Free electronic access 24 x 7 at [www.infosend.com](http://www.infosend.com) with the following online benefits:
  - Log, track & close support requests
  - View & update support requests
  - Access published documentation
  - Access available downloads
  - Download reports
  - View Job Tracking statistics
  - Download sample files in PDF format

Standard hours of support are from 6:00 AM Pacific to 6:00 PM Pacific, Monday through Friday, excluding designated statutory holidays. Weekend assistance is available and must be scheduled in advance and in most cases is billable.

InfoSend recognizes the below holidays and will be closed should they fall on a weekday.

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day

- Thanksgiving Day
- Christmas Day

## Inbound Support Ticketing, Escalation, and Resolution Workflow

All issues or questions reported to support can be tracked via an online support ticket. Account Managers can provide support via telephone, email or the online support ticket tool that can be accessed by logging into [www.infosend.com](http://www.infosend.com).

1. **Contact Dedicated Account Manager:** Each web submission, call or email is handled with personal support. Clients receive support by contacting their dedicated Account Manager. If the client's dedicated contact is not available, the support request will be handled by another cross-trained Account Manager or Senior Account Manager. This representative will be your liaison through the support process, giving you a single point of contact for issue resolution.
2. **Request Logging:** Each support request can be logged using InfoSend's online Support Ticket Tool. Support Ticket requests are assigned a unique ID and can be viewed by both InfoSend Support and the client's authorized representatives. Support Ticket requests are archived and can be filtered by open and closed requests.
3. **Escalation Procedure:** InfoSend staff will internally escalate any required internal technical or operational resources to ensure that quality issues are resolved quickly and completely the first time. All necessary modifications are thoroughly tested before being applied to client applications to ensure that the final product meets quality expectations.
4. **Ticket Resolution:** Once an issue has been resolved, clients are notified of the solution and allowed to review new sets of samples to approve any changes. Extra attention is paid to the new job throughout our production, quality control and mailing process. When all parties confirm that the job is meeting quality expectations through every step in the process, we will approve and release the job for completion.
5. **Client Satisfaction:** Any concerns or questions around the support being provided may be escalated to the Client Services Director.

## Proactive File Halt, Validation Error and Quality Control Support Procedures

InfoSend's data processing platform is designed to validate client data and will halt if any anomalies or incomplete data is detected. In addition, InfoSend's dedicated QC process will review all printed outputs to check for issues caused by client data. When issues are detected:

1. **Alert Notification:** InfoSend's internal system will automatically place the Job on hold, open a ticket and alert the CS department via an internal alert system, identifying the client and type of output.
2. **Assessment and Follow Up:** InfoSend's CS personnel will assess and then follow up with the relevant client contacts to notify of the issue.
3. **Resolution:** CS personnel will work with the client on how to address the data, either with a new data file or with programming adjustments.

## File Cancellation and Document Pull Request Procedures

InfoSend's CS department accepts requests to cancel entire batches or pull select documents from a batch as a standard function of the department. This request can be placed through InfoSend's online website support ticketing system, via email, or by calling the 800 number. The request is then documented by the CS team and communicated to the InfoSend production departments through our internal systems.

1. **File Cancellation:** These requests are typically submitted to InfoSend just after file transfer but before printing. InfoSend's CS personnel will immediately change the status of the Job to prevent any further progression through the InfoSend manufacturing environment and remove the Job batch from the queue. Clients utilizing the Sample Approval workflow will have the option to cancel their own job, which will then be removed from the queue.
2. **Pull Document Requests:** These requests are typically submitted by the Client after the file is processed and prior to mailing. Ideally, these requests would be submitted to the CS team prior to the mail piece receiving the "Quality Control" timestamp in the website's client-facing job tracking system. Once the job has been marked as completing Quality Control, it will be moved into Mail Preparation. For this reason, Pull Document Requests made after the job has passed through QC should be communicated directly via phone call to ensure that they are handled immediately to minimize the chance that the piece is processed for mailing. The document to be pulled will then be intercepted after the document is printed. Pulled documents can either be recycled or returned to the Client.

## Common Challenges for Implementations

**\*\* InfoSend is the incumbent vendor providing service to the City of Lauderhill and the City has been utilizing InfoSend's services for several years. We are providing example implementation challenges since it was requested. Since City of Lauderhill is already live an implementation will not be needed \*\***

While InfoSend has established a successful methodology for implementing client projects, we have found a few areas which tend to consistently present challenges during implementations. Identifying these potential challenges up front can be helpful in identifying and preventing hold-ups in the implementation process.

One such area is on completeness and/or accuracy of the deliverables on which the project is based. We find that if data files are unavailable, changing, or otherwise incomplete at the outset that it can be challenging to discover all of the requirements for an application. This can lead to an extended requirement gathering process, and in some cases a significant change in scope late in the project. Your Account Manager will work to ensure that we uncover all aspects of the desired outputs (including document and customer types, special workflows, business rules, etc....) and to ensure that we have all the relevant samples and files to present those records. This up-front reconciling of the "ask" to the "get" helps to ensure the completeness of information as the project progresses. This also helps to minimize changing requirements and scope creep in later stages of the project, which can lead to delays late in the process.

Another area where we have encountered challenges centers around establishing clear channels of communication and responsibility on the project teams. InfoSend will staff the project team with resources who have the authority to make necessary decisions surrounding the application, or easy access to an escalation point who can make a call on a request when needed. We find that client project teams who have a similar structure, with a clearly defined chain of command and decision-making structure, are best suited toward successful outcomes. InfoSend has a number of tools and processes which will help simplify the process and make sure that we are providing accurate information and clear updates to requirements, in order to minimize the impact on decision-making resources, wherever possible. Much of the client involvement in the process occurs in the initial weeks leading up to the execution of the Statement of Work, and as such we seek to provide a complete and accurate picture of any open items requiring input from client team resources. Timely resolution of these items allows both teams to meet milestone goals and keep the project moving forward.

## TAB #4 – Relevant Experience

List at least the last five (5) comparable contracts completed by your firm. Include: • Client name, address, and phone number • Project manager and key staff assigned • Role of your firm (prime or subcontractor) • Description of services provided and outcomes • Challenges faced and resolutions • Contract start and end dates

### **Rolla Municipal Utilities**

Primary Contractor: Yes

Address: 102 W 9th St, Rolla, MO 65401

Telephone: 573.364.1572

Description of contract: Utility Bill Printing and Mailing Services. Delivered on time and on budget.

Estimated Annual Spend: \$14,000 (not including postage)

Contract Start: February 3<sup>rd</sup>, 2020

Contract End: Ongoing

### **Bonita Springs Utilities, Inc.**

Primary Contractor: Yes

Address: 11900 E. Terry Street, Bonita Springs, FL 34135

Telephone: 239.992.0711

Description of contract: Utility Bill Printing and Mailing Services. Challenges included conversion from a prior vendor service to InfoSend service. Delivered on time and on budget.

Estimated Annual Spend: \$38,000 (not including postage)

Contract Start: November 27<sup>th</sup>, 2019

Contract End: Ongoing

### **City of Bloomington**

Primary Contractor: Yes

Address: 109 E. Olive Street, Bloomington IL 61701

Telephone: 309.434.2225

Description of contract: Utility Bill Printing and Mailing Services. Delivered on time and on budget.

Estimated Annual Spend: \$34,000 (not including postage)

Contract Start: January 13<sup>th</sup>, 2021

Contract End: Ongoing

### **City of San Bernardino - Business Tax Division**

Primary Contractor: Yes

Address: PO Box 1318, San Bernardino, CA 92402

Telephone: 909.384.5035

Description of contract: Business Tax Notice Printing and Mailing Services. Delivered on time and on budget.

Estimated Annual Spend: \$21,723.94 (not including postage)

Contract Start: March 1<sup>st</sup>, 2021

Contract End: Ongoing

### **Brownsville Public Utilities Board**

Primary Contractor: Yes

Address: 1495 Robinhood Drive Brownsville, TX 78523

Telephone: 956.983.6131

Description of contract: Utility Bill Printing and Mailing Services. Delivered on time and on budget.

Estimated Annual Spend: \$112,000 (not including postage)

Contract Start: October 7<sup>th</sup>, 2020

Contract End: Ongoing

## Experience with High-Volume Municipal Utility Billing

InfoSend has extensive experience providing bill printing, inserting, and mailing services for municipalities with high-volume utility billing. Over 700+ Utility Billing Clients Nationwide. Two of InfoSend’s current clients include:

- **Kansas City Board of Public Utilities (MO):** Processing 81,000 monthly utility mail pieces.
- **Lafayette Utilities System (LA):** Processing 95,000 monthly utility mail pieces.

In addition, InfoSend supports multiple other clients producing **50,000+ utility bills per month**, demonstrating consistent capacity and reliability in handling large-scale municipal billing operations

**InfoSend requests that the partial client listings below remain CONFIDENTIAL as part of this RFP response.**

<u>TYLER TECHNOLOGIES CLIENTS</u>	<u>FLORIDA CLIENTS</u>	<u>50,000+ UTILITY BILL CLIENTS</u>
<ul style="list-style-type: none"> <li>• City of Altamonte Springs, FL</li> <li>• City of Fruitland Park, FL</li> <li>• City of Bunnell, FL</li> <li>• City of Atlantis, FL</li> <li>• City of Palm Coast, FL</li> <li>• City of Zephyrhills, FL</li> <li>• City of Clermont, FL</li> <li>• City of Florence, SC</li> <li>• City of Elizabeth City, NC</li> <li>• City of Demorest, GA</li> <li>• City of Manhattan Beach, CA</li> <li>• City of Clinton, IL</li> <li>• San Antonio Water Co., CA</li> <li>• Norwood Municipal Light, MA</li> <li>• City of Iowa City, IA</li> <li>• City of Buffalo, MN</li> <li>• City of Coachella, CA</li> <li>• City of Newport Beach, CA</li> <li>• City of Santa Cruz, CA</li> <li>• City of Chino, CA</li> </ul>	<ul style="list-style-type: none"> <li>• City of Clearwater, FL</li> <li>• City of St. Augustine, FL</li> <li>• Clay County Utility Authority, FL</li> <li>• City of Coral Springs, FL</li> <li>• City of Tamarac, FL</li> <li>• City of Lauderhill, FL</li> <li>• City of North Lauderdale, FL</li> <li>• Keys Energy, FL</li> <li>• Florida City Gas, FL</li> <li>• City of Ocala, FL</li> <li>• City of Pembroke Pines, FL</li> <li>• City of Cape Coral, FL</li> <li>• City of Cooper City, FL</li> <li>• City of Gulf Breeze, FL</li> <li>• City of Naples, FL</li> <li>• City of Marco Island, FL</li> <li>• City of Fort Myers, FL</li> <li>• City of Leesburg, FL</li> <li>• Seacoast Utility Authority, FL</li> <li>• City of Titusville, FL</li> </ul>	<ul style="list-style-type: none"> <li>• Manatee County Utilities, FL</li> <li>• Emerald Coast Utility Authority, FL</li> <li>• Collier County Utilities, FL</li> <li>• Orange County Utilities, FL</li> <li>• Henrico County Utilities, VA</li> <li>• Pensacola Energy, FL</li> <li>• Utilities Inc, FL</li> <li>• City of Tucson, AZ</li> <li>• Modesto Irrigation District, CA</li> <li>• Nexus Water, FL</li> <li>• Inframark Utilities, TX</li> <li>• Springfield City Light &amp; Power, IL</li> <li>• City of Chandler, AZ</li> <li>• City of Portland, OR</li> <li>• Glendale Water &amp; Power, CA</li> <li>• Turlock Irrigation District, CA</li> <li>• Arizona Water Company, AZ</li> <li>• Irvine Ranch Water District, CA</li> <li>• Butler County, OH</li> <li>• And many others...</li> </ul>

# TAB #5 – Scope of Work Response

## General Specifications

**A. The Respondents will work with City staff to design a utility bill statement and submit prototypes of the billing statement and envelopes to the City for review, revision and final approval.**

### InfoSend Document Design Services

- Customizable document look and feel for all clients providing "raw data" inputs, hosted and maintained by dedicated InfoSend staff.
- Experience with a wide array of industry-specific document types, including Government, Citations, Utility, Healthcare, Finance, Insurance and more.
- Client Services staff trained in the use of graphic design tools to ensure mockups are professional and accurate.
- During design and mockup, InfoSend advises on latest design best practices for consumer readability, response rate and USPS compliance.
- For documents with OCR, barcode or remittance requirements, full compliance with any specification, including lockbox testing with the delivery of production samples prior to Go-Live.
- Extensive experience, software and dedicated equipment for facilitation of both transactional and promotional documents: full-color Inkjet, high-capacity folding and cutting, and online tools for managing marketing copy or images.

InfoSend's Account Managers are trained in the use of various graphic design tools which are leveraged to create your documents. The Account Manager assigned to this project will work with the client's project team to create outputs which meet the high standards expected by our clients. Wherever possible we will look to provide suggestions to improve the look, feel, readability, and/or response rate for your custom communications using our extensive experience in a wide-variety of industries. All of the graphic design work for your projects will be conducted in-house at InfoSend allowing for us to maintain a high level of quality and responsiveness to your requirements.

InfoSend maintains a wide array of printing and finishing equipment necessary to handle transactional and promotional document production, including:

- Grayscale and full-color laser printers
- Full-Color Inkjet printer
- High-capacity offline folding equipment
- High-capacity industrial cutting equipment
- Variable speed mail inserting equipment
- Proprietary and licensed software solutions for processing data, creating client outputs, maintaining USPS compliance
- Full compliance with any OCR, barcode or remittance specification, including lockbox testing with the delivery of production samples prior to Go-Live.

Often InfoSend will consult to provide clients with best practices and design options which leverage the data and printing technology to their fullest. InfoSend's design team can assist in making sure a utility statement has information hierarchy, appropriate use of color and white space, as well as innovative graphics.

InfoSend provides document composition services for **hundreds of utilities nationwide**. Below is an example design which is using the latest in customer insights, preferences and printed output technology.

Front:



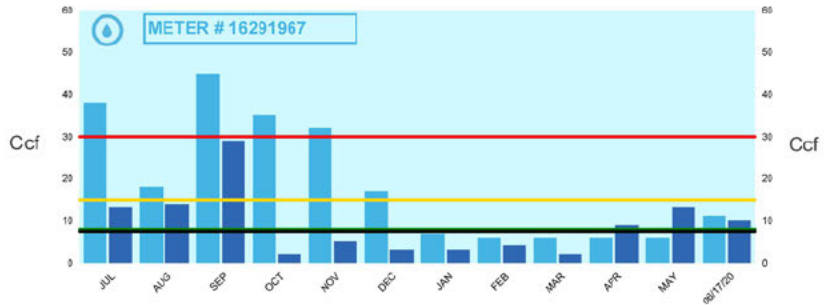
UTILITY SERVICES STATEMENT

Last Bill	Payments/Credits	Deposits	Adjustments	Balance Forward	Current Charges	Amount Due
\$138.43	-\$138.43	\$0.00	\$0.00	\$0.00	\$122.94	\$122.94
Bill Date	Service Period	Due Date				
06/18/20	05/19/20 to 06/17/20	07/08/20				



**JANE SAMPLE**  
 ACCOUNT NUMBER  
 123456-123456  
 1234 E SAMPLE ST  
**AMOUNT DUE:**  
**\$122.94**

 <b>SEWER</b> <b>\$49.29</b> Phone: 520-724-6609	 <b>WATER</b> <b>\$50.28</b> Phone: 520-791-3242	 <b>ENVIRON. SVC.</b> <b>\$17.58</b> Phone: 520-791-3171
 <b>GREEN STORMWATER</b> <b>\$1.30</b>	 <b>MISCELLANEOUS</b> <b>\$4.49</b> Breakdown of charges on reverse	



■ CURRENT USAGE ■ LAST YEAR USAGE	— VOL 0-7 at \$2.07/Ccf — VOL 8-15 at \$3.82/Ccf — VOL 16-30 at \$8.39/Ccf — VOL 31+ at \$12.93/Ccf — Annual Residential AVG. = 8 Ccf		
Projected Next Read: 07/17/20			
<b>Cycle - Route</b>	<b>Current Read</b>	<b>Previous Read</b>	<b>Usage (Ccf)</b>
13-53	961	951	10
<b>Water Usage</b>	<b>In Gallons</b>	<b>In Ccfs ( 1 Ccf = 748 Gallons )</b>	
Current Usage:	7480	10	
Last Year Usage:	8228	11	

Please fold on perforation before tearing and return bottom portion with your payment.



UTILITY SERVICES STATEMENT  
 PO BOX 27210  
 TUCSON, AZ 85726-7210

Pay online at: [www.tucsonaz.gov/pay-utility-bill](http://www.tucsonaz.gov/pay-utility-bill)  
 Pay by phone: 520-791-3242

Service Address: 1234 E SAMPLE ST

**Addressee**

TUA0618A 8581 1 AV 0.389  
 7000009001 00.0033.0155 8581/1



JANE SAMPLE  
 1234 E SAMPLE ST  
 TUCSON AZ 85711-3802

Service Period	Due Date	Account Number
05/19/20 to 06/17/20	07/08/20	123456-123456
Optional Open Space/Riparian Donation	Amount Due	Amount Paid
<input type="checkbox"/> \$2.00 <input type="checkbox"/> \$5.00 <input type="checkbox"/> \$10.00 <input type="checkbox"/> \$ _____	\$122.94	\$

Additional information on reverse

**Please Make Checks Payable And Remit To**








CITY OF TUCSON  
 PO BOX 52771  
 PHOENIX, AZ 85072-2771

000123405000678912000000342567

Back:

### Billing Detail

Your Water Provider is: TUCSON WATER

	SERVICE FEE	\$13.00
	SEWER RESIDENTIAL VOL 10.00	\$36.29
	<b>SEWER SUBTOTAL</b>	<b>\$49.29</b>
	MONTHLY SERV CHRG WA	\$16.33
	VOL 7.00 @ \$ 2.07 WA	\$14.49
	VOL 3.00 @ \$ 3.82 WA	\$11.46
	CAP CHARGE \$ .70/CCF	\$7.00
	CONSRV FEE \$ .10/CCF	\$1.00
	<b>WATER SUBTOTAL</b>	<b>\$50.28</b>
	GRNDWTR PROTECT FEE	\$1.13
	GARB 300 SHRD ALLEY	\$16.00
	RECYCLING SURCHARGE	\$0.45
<b>ENVIRONMENTAL SERVICES SUBTOTAL</b>	<b>\$17.58</b>	
	CITY SALES TAX	\$1.34
	STATE SALES TAX	\$3.15
	<b>MISCELLANEOUS SUBTOTAL</b>	<b>\$4.49</b>
	GRNSTRM FEES .13/CCF	\$1.30
	<b>GREEN STORMWATER SUBTOTAL</b>	<b>\$1.30</b>

**CURRENT CHARGES** **\$122.94**

Questions?  
Pima County Regional Wastewater Reclamation Department  
Phone: 520-724-6609  
www.pima.gov/wastewaterreclamation  
Tucson Water Customer Service:  
Phone: 520-791-3242  
Outside Tucson: 800-598-9449  
www.tucsonaz.gov/water  
City of Tucson Environmental Services: Phone: 520-791-3171  
www.tucsonaz.gov/esd

#### MESSAGE CENTER

On June 17, a new payment system will require all customers who pay online or use auto-payment to establish a new account. There will be information posted on how to register and set up your new account. If you would like a reminder alert for June 17 by text or email, sign up at [www.tucsonaz.gov/payutility](http://www.tucsonaz.gov/payutility). After June 17, you may go to the page to create your new account.

How to read your bill in English:  
[www.tucsonaz.gov/read-my-bill-english](http://www.tucsonaz.gov/read-my-bill-english)

Taxes are calculated based on the Water Subtotal.  
Miscellaneous charges may include: city and state taxes, new water meter installation fees, delinquent fees, water turn-on charges, backflow prevention permit costs, plan reviews and revisions, and other applicable charges.

TERMS AND CONDITIONS  
Due date applies to current charges ONLY. Any past due balance is due now. Please allow 7 days for payments to post to your account. A \$28.00 fee will be charged for any returned checks.  
**Pay your bill ONLINE for same day credit to your account at [www.tucsonaz.gov/pay-utility-bill](http://www.tucsonaz.gov/pay-utility-bill)**

Address Change If you have a change of mailing address, please check the box to the left and fill out the information below

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

For name change call Customer Service at (520) 791-3242

Your tax-deductible Open Space/Riparian donation will support the preservation of biologically-rich open space lands and enhance urban waterways. Visit [www.tucsonaz.gov/water/checkbox](http://www.tucsonaz.gov/water/checkbox) to learn more. Your optional donation will not affect your service fees.

### Utility Bill Design Highlights:

- Information hierarchy based on customer feedback, ensuring Amount Due and Due Date are very clear. Amount Due is placed strategically in multiple locations.
- Color schemes are utilized to enhance labeling of various services and/or charges.
- Usage and historical information are given prime real estate.
- A dynamic message area for clients to place customizable messages to all customers or customers falling under specified criteria.
- Graph done in a circular manner, utilizing multiple colors to communicate the various charges that lead to the total.
- Backside of the bill utilized to communicate details of charges and payment options, labeled with different colors by channel.
- We offer multilingual support and are able to present bills in multiple languages.

**B. The Respondents shall provide a single point of contact within the Respondents firm to handle the training of City staff dealing with billing services provided through the implementation process as well as support issues dealing with services provided.**

The City of Lauderhill is already live and fully implemented with InfoSend as a current customer. Details of our Implementation Process are listed below for reference purposes. No new implementation will be needed with InfoSend.

**InfoSend Implementation**

InfoSend's client-focused service and industry-leading client retention rate starts with a successful implementation. Since 1996 InfoSend has continually refined the implementation process to ensure clients Go-Live occurs expeditiously and without error.

All InfoSend implementations have 4 key phases.

1. **Requirements Gathering**
2. **Application Build**
3. **User Acceptance Testing (UAT), Samples, Parallel Testing, and Training**
4. **Go-Live and Follow Up**

**Requirements Gathering**

The project is started with a dedicated Account Manager assigned to the project. The Account Manager acts as the primary point of contact with clients while working with all internal InfoSend programming and operations staff, and will chair a recurring (often weekly) implementation meeting with the client's key staff. InfoSend, as a cloud-based solutions provider, engages clients in implementation and support via phone, email and web-based tools, including web-browser screen sharing. All setup, training and request tracking is provided virtually using industry standard tools. Critical communications sent to or received from clients during the implementation are centrally archived in the InfoSend CRM system, ensuring all aspects are documented and the implementation can continue should the primary resources be out of the office.

The Account Manager establishes key milestones and completes standardized steps in the InfoSend implementation plan. The process includes requirements gathering and analysis of the application to be developed, including a data mapping exercise, resulting in a Statement of Work (SOW) for client approval.

**Application Build**

Once the SOW is approved, the application undergoes development and configuration. Prior to completion of development, the application is reviewed by a secondary Account Manager or member of the IT management group to ensure that no task was left undone or done incorrectly. Sample output is produced and checked by InfoSend Quality Control; automated Quality Control methods are configured within processing.

**Samples, Parallel Testing, and Training**

During the last phase of the implementation, output and application web access is provided to clients for User Acceptance Testing (UAT). Once the application build is validated and accepted by the client, the application is put into Parallel Testing mode. During this time clients are encouraged to transfer copies of live data to InfoSend to be automatically processed and output for review, simulating go-live. Clients check the web application and output to ensure that it is satisfactory and any requested revisions will be completed before go-live. Any payment related applications are tested to ensure payment deposits are received and reconciled. Clients are also trained on how to use InfoSend tools and reporting to support the application at this time.

The hour-long, web-based training covers:

- File uploads
- Sample review and approval

- Managing document messages and insert requests
- Accessing archived reports
- Managing User Permissions
- Performing research and support for customer activity
- Payment reconciliation (for payment applications)
- Submitting, viewing and closing support requests

### Go-Live and Follow Up

Go-Live of the application includes an "all-hands" approach, with all key InfoSend managers required to review the launch day activity and sign off before application output is final. After Go-live, your Account Manager performs a post go-live follow up to ensure client satisfaction.

**C. The Respondents must be able to produce the City's bill in an agreed upon format or propose a new bill format acceptable to the City and compatible with the current billing software. Respondent must be able to provide an online presentment portal for the viewing of utility bills. Portal should allow for interface with City's merchant service vendor to process payments.**

InfoSend complies with this requirement. City of Lauderhill is an existing InfoSend client in live production status. The City is utilizing the web portal at [www.infosend.com](http://www.infosend.com) which features are detailed below:

### InfoSend Archiving Services

- **Multiple Channels:** Capable of hosting documents within an InfoSend database as well as shipping PDFs via secure FTP or DVD media.
- **InfoSend Hosted Option:** Secure cloud solution where InfoSend hosts documents for a client-specified historical retention, allowing for reprints and emailing documents on demand.
- **API Access for Hosted Docs:** For clients who choose to have InfoSend host, an API is made available that enables paperless integrations with ERP/CIS/billing systems, as well as online payment providers.
- **Insert Communications Included:** The InfoSend system is also capable of including the insert communications as additional pages in the PDF (eInserts), ensuring clients and their customers are viewing the complete document which was distributed.
- **USPS Mail Tracking:** For clients using the hosted solution, USPS mail tracking info is provided for eligible First-Class mail, using the IMb Tracing™ service.
- **Remit Tracking:** Also, for clients using the hosted solution, InfoSend can provide a report of checks mailed back by customers using the included remit stub. A daily report of customer mail and amounts due will be provided, assisting clients with cashflow expectations.
- **Final Document Transfer:** InfoSend can push PDFs via secure FTP in a standard or customized format, allowing clients or third parties to archive documents on other systems.

InfoSend's Customer Communications Management (CCM) platform offers a robust, secure and redundant archive service that clients can rely upon to access documents rendered, modified or processed by InfoSend. InfoSend has built a flexible set of options to ensure clients and their customers can access documents in the context that they prefer, including in existing CIS/ERP or billing applications. InfoSend offers PDF delivery and hosted models.

With all options, InfoSend is capable of including the insert communications as additional pages in the PDF (eInserts), ensuring clients and their customers are viewing the complete document which was distributed.

**1. Delivery via Final Doc Transfer (FDT):** For clients who prefer to store and host PDFs within another software environment, InfoSend is able to deliver the PDFs via Final Doc Transfer in the following ways:

- **Secure FTP Transfer:** Upon batch completion by InfoSend, a PDF file of the batch will be sent via secure FTP to the client with

a companion XML index file containing standard details of the PDF batch (account #, PDF page number, etc.).

- **Custom Secure FTP Transfer:** Upon batch completion by InfoSend, the PDF data can be delivered in a complete batch or broken down and sent as one PDF file per account or document. In addition, InfoSend can match PDF file naming conventions or provide index data in a specified format. InfoSend will work with the client to define the workflow, and fees may apply depending on complexity.

**2. Hosted via Print Image Archive (PIA):** For clients who prefer to outsource the storage and only retrieve PDF documents on demand, InfoSend provides two ways to view documents via the Print Image Archive:

1. **Search via the InfoSend Portal:** Upon batch completion, InfoSend will archive the documents for the client to retrieve on demand from a web interface. By logging into the InfoSend Portal, client representatives can access the archive and search for documents according to standard criteria such as account number or date. In addition, InfoSend provides up to 5 custom search fields, specific to the client's data (examples: "bill cycle" or "notice ID"). Documents can be viewed on screen, downloaded to the desktop or emailed.
2. **Web Services Integration:** Upon batch completion, InfoSend will archive the documents for the client to retrieve on demand via an encrypted API query string. This secure option is best suited for clients who have the capacity to integrate the InfoSend archive into a software package on their end. This web interface allows outside solutions to perform document presentment within their own application framework without having to host an archive.

**Mail Tracking:** All clients using the hosted Print Image Archive from InfoSend are automatically given Mail Tracking. With Mail Tracking, the USPS data is provided via the IMb Tracing™ service, where all qualified mail with an Intelligent Mail Barcode that is scanned at a sort facility is logged. This data provides insight into the estimated delivery time frame of mail to the customer. *Only available with mail sent using 1st Class Postage, and not available in some cases with postcard mailings.*

Example PIA Search Screen with Mail Tracking Results:

InfoSend, Inc. Close Window Wednesday, February 12, 2020

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**PIA Viewer 2.0 Search Fields**  
 Search Returned 13 Result(s) - Displaying 1 - 13  
 Clear Search Results  
 Default search is 'Starts with'.  
 % (Percent symbol): Match 0 or more characters; \_ (Underscore): Match any single character

Name:    
 Account Number: 216031-1240   
 Job Code: All Jobs   
 Received Date (MM-DD-YY):  To    
 SPCL Status:

---

Name	Account Number	Job Code	Received Date	SPCL	Amount	Outbound	Inbound	Save	View
JOE CUSTOMER	216031-1240	INFINF191203A	2019-12-03	77.30	2019-12-05	2019-12-11	<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF191008A	2019-10-08	116.30	2019-10-10	2019-11-03	<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF191031A	2019-10-31	119.30	2019-11-04		<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF191105A	2019-11-05	193.60	2019-11-08	2019-11-13	<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF190904A	2019-09-04	116.30	2019-09-07	2019-10-03	<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF190927A	2019-09-27	119.30	2019-10-02		<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF190702A	2019-07-02	79.70	2019-07-05	2019-07-10	<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF190806A	2019-08-06	138.83	2019-08-09	2019-08-15	<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF190214A	2019-02-14	86.00	2019-02-16		<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF190417A	2019-04-17	86.00	2019-04-20		<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF190604A	2019-06-04	99.34	2019-06-07		<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF200107A	2020-01-07	39.45	2020-01-10	2020-02-09	<input type="button" value="Save"/>	<input type="button" value="View"/>	
JOE CUSTOMER	216031-1240	INFINF200204A	2020-02-04	86.80	2020-02-07		<input type="button" value="Save"/>	<input type="button" value="View"/>	

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**Remit Tracking:** For clients utilizing the Print Image Archiving service, InfoSend can also track inbound mail from customers utilizing an included remittance stub in the outbound mail. With Remit Tracking, clients will be able to see when a customer responded to the original mail piece, as well as get a daily report of inbound mail with an estimated value of payment remittances based on the outbound mail, assisting with cashflow expectations.

#	A	B	C	D	Formula Bar		E	F	G	H	I	J
1	Name	Account Num	Job Code	Amount	Inbound Entry Time	Entry Zip	Final Outbound	Bill Date	Bill Due Date	Amount Due		
2	JOE CUSTOMER	185975-86248	INF0221A	87.23	3/31/2020 20:44	92799	2/26/2020 9:42	2/21/2020	3/12/2020	\$87.23		
3	JOE CUSTOMER	96171-68338	INF0221A	62.73	3/31/2020 20:29	92799	2/29/2020 10:41	2/26/2020	3/17/2020	\$62.73		
4	JOE CUSTOMER	261097-69062	INF0221A	87.23	3/31/2020 20:31	92799	2/29/2020 11:24	2/26/2020	3/17/2020	\$87.23		
5	JOE CUSTOMER	57033-62358	INF0221A	324.65	3/31/2020 20:33	92799	3/2/2020 10:53	2/27/2020	3/18/2020	\$324.65		
6	JOE CUSTOMER	204523-63070	INF0221A	51.21	3/31/2020 20:31	92799	3/2/2020 10:58	2/27/2020	3/18/2020	\$51.21		
7	JOE CUSTOMER	289699-70380	INF0221A	66.2	3/31/2020 22:39	92799	3/2/2020 10:53	2/27/2020	3/18/2020	\$66.20		
8	JOE CUSTOMER	89497-95498	INF0221A	142.69	3/31/2020 20:39	92799	3/4/2020 10:15	2/28/2020	3/19/2020	\$142.69		
9	JOE CUSTOMER	140915-87848	INF0221A	367.54	3/31/2020 21:29	92799	3/9/2020 12:27	3/3/2020	3/23/2020	\$367.54		
10	JOE CUSTOMER	983-866	INF0221A	96.6	3/31/2020 20:31	92799	3/9/2020 14:28	3/3/2020	3/23/2020	\$96.60		
11	JOE CUSTOMER	40541-15240	INF0221A	86.78	3/31/2020 19:10	92799	3/7/2020 10:53	3/4/2020	3/24/2020	\$86.78		
12	JOE CUSTOMER	281597-5254	INF0221A	54.21	3/31/2020 20:39	92799	3/7/2020 9:46	3/4/2020	3/24/2020	\$54.21		
13	JOE CUSTOMER	145881-102620	INF0221A	138.1	3/31/2020 20:59	92799	3/7/2020 13:05	3/4/2020	3/24/2020	\$138.10		
14	JOE CUSTOMER	153657-3648	INF0221A	61.5	3/31/2020 20:18	92799	3/7/2020 10:57	3/4/2020	3/24/2020	\$61.50		
15	JOE CUSTOMER	75175-56990	INF0221A	89.88	3/31/2020 16:32	90052	3/9/2020 10:58	3/5/2020	3/25/2020	\$89.88		
16										<b>Expected Remit</b>		<b>\$1,716.55</b>
17												


**D. The selected Respondents must have the ability to accept daily bill files using an online upload or a standard FTP transmission. City staff must be able to log into the Respondents' server and transmit the files daily, as needed.**

### File Submission and Job Tracking

Clients are able to upload files directly to InfoSend over the HTTPS connection, allowing users to send the input data for InfoSend processing on demand (note: PGP file encryption and secure FTP also available).

All status on the fulfillment of client output is displayed via the online tool: confirmation of receipt, processing status, sample file and approval status (optional), Printing, Quality Control, Mail Prep and Confirmation of distribution. Clients are able to check the "Viewed" box to confirm that the batch was reviewed internally.

**CLICK HERE TO**



**UPLOAD FILES**

Show Filenames -  Yes  No | Job Type -  | Only Show Active Jobs -  Yes  No

Job Code:  | Filename:

Job Type	Job Code	Filename	Received	Processing	Sample File	Sample Status	Printing	QC	Mail Prep.	Confirmation	Viewed
RETURN_BILLS	INF0323B	RETURNS.2012.TXT	2012-03-23 10:28:01	Done	Pending	Pending	Pending	Pending	Pending	Pending	<input type="checkbox"/>
REGULAR_BILLS	IN10323A	REGULARS.2012.TXT	2012-03-23 10:28:01	Done	Pending	Pending	Pending	Pending	Pending	Pending	<input type="checkbox"/>
DELINQUENT_NOTICE	IN10323A	DELINQUENTS.2012.TXT	2012-03-23 10:28:01	Done	2012-03-23 10:45:06	Approve Reject	Pending	Pending	Pending	Pending	<input checked="" type="checkbox"/>

**E. The Respondents must have the capability to suppress the printing of bills and/or envelopes for certain customers, based upon fields provided the City.**

**USPS & Special Messaging:** During processing, the system will also validate customer mailing addresses, optionally apply National Change of Address (NCOA) updates, and perform record suppression based on client-defined criteria. The system also performs USPS pre-sorting of records, applying the Intelligent Mail Barcode (IMB) and ensuring the records are in the correct order to maximize postal efficiency. Additionally, InfoSend's CCM platform will check the database for any scheduled messages or inserts to be included with the output.

**F. The Respondents will be responsible for keeping up with U.S. Postal regulations and requirements for mailings.**

### USPS Compliance and Efficiency

InfoSend's Customer Communications Management (CCM) platform allows InfoSend to distribute client output to multiple channels, including mail via USPS. InfoSend, as a mailing service provider, maintains technology and USPS compliance to ensure clients are getting the best postage rates and features from mailings.

Postage is the *most expensive component* of mailed document production, a very important cost consideration when selecting a document production partner and not all vendors provide the most cost-saving discounts available. 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 \$0.005 on each qualifying mail piece below the normal lowest pre-sort 5-digit postage rate. InfoSend, by default, will implement the Full-Service Intelligent Mail barcode within client documents produced, saving clients many thousands of dollars in postage costs.

### **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.

### **USPS Seamless Acceptance**

InfoSend manages USPS compliance by maintaining regulatory and processing standards as a Full-Service provider of the USPS, and has certified as a Seamless Acceptance provider for verifying mail electronically for acceptance. InfoSend meets all mail piece design standards for document design internally as well as maintains USPS business relationship account status with the USPS. InfoSend maintains USPS quality data compliance utilizing USPS approved CASS/Pave, presorting and move update software (BCC Software) to perform address hygiene, achieves optimal postal discounts and applies move updates along with associated reporting.

### **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.

**G. The Respondents shall guarantee that the completed work will be printed and mailed by the United States Postal Service (USPS) the same business day of receipt.**

InfoSend acknowledges and accepts this requirement. InfoSend is the incumbent vendor for this project and is already working with the City of Lauderhill. This is the current process that is in place and will be the SLA going forward as well.

**H. The City must be able to track all jobs and files throughout the production process utilizing an online tool provided by the Respondents.**

InfoSend is fully capable of meeting this requirement.

**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.

**I. The Respondents will provide the customer with concise, easily understood information as to when billed charges need to be paid to avoid interruption of service and when the last payment amount was received by the City on the billing statement.**

InfoSend acknowledges and accepts this requirement.

**J. Should mailings not be delivered to the USPS in a regular and timely manner, liquidated damages shall be assessed in accordance with the Special Terms and Conditions Section. Additionally, contract termination may result.**

InfoSend will accept a mutually agreeable determination of what may give rise to liquidated damages and what the penalty amount is.

**K. City staff must have the ability to view and approve sample bills online before they are printed and mailed.**

**Sample Approval**

This optional workflow allows clients to download a sample of the output, with an included Process Summary report of the input/output counts, inserts to be included, suppressions and a postage estimate. The sample file can contain the entire output or a subset based on client criteria. Upon approval, the sample output is released for production and distribution by InfoSend.



**L. The Respondents must provide an interface that will allow City staff to update bill messages and bill inserts on an as-needed basis which can include/exclude based on expressed requirements.**

**Message Manager**

This free account management tool is a custom-built web-based application that allows clients to control the messages that print on output. Clients can schedule the messages months or even years in advance, as well as set criteria to assign unique messages to different types of customers, or even to individual accounts. A PDF preview displays the message in the actual font that will be used.

Below you will find a list of all messages your company currently has pending:

File Type	Message Name	Message Type	Message Area	Start Date	End Date	Status	Test?	Message
STATEMENTS	Rate Change Notice	HtmlMessage	HTMLBox	2013-01-01	2013-02-28	Active	No	Rates are ...
STATEMENTS	Holiday Schedule	HtmlMessage	HTMLBox	2012-12-01	2012-12-31	Active	No	Please not...
STATEMENTS	Fall Marketing Message	HtmlMessage	HTMLBox	2012-10-01	2012-11-30	Active	No	This fall ...
STATEMENTS	New Community Center	HtmlMessage	HTMLBox	2012-08-01	2012-09-30	Active	No	Visit the ...
STATEMENTS	Revised Business Hours	HtmlMessage	HTMLBox	2012-06-01	2012-07-31	Active	No	Business h...

Add Message For: Please Select Add Message

File Type: STATEMENTS

Message Type: HtmlMessage - HTMLBox

Message Name:

Start Date (YYYY-MM-DD):  -  -

End Date (YYYY-MM-DD):  -  -

Accounts (See Description Above):

Message:

Test (Check this if this is a test message that should "NOT" be included on production jobs):

Next

**M. The Respondents will provide the ability to print special messages and/or other information on the billing statements and/or to insert additional pieces of printed literature to deliver special information to customers.**

**Insert Management**

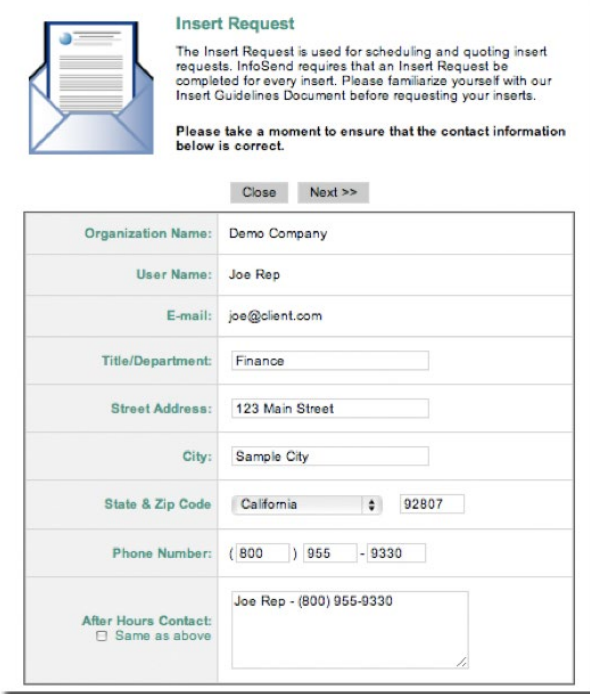
The Insert Management tool is designed for clients to control what additional materials will be included with the standard output. Clients may request InfoSend Produced Inserts as well as schedule drop-shipped inserts from within the tool. The tool also provides the history of all Insert requests for client reference.

Here is a list of the last 50 insert requests made by your organization.

Show All Inserts

Insert Name	Run Date	Request Submitted On	Insert Status	Programs	Insert Type	Details
*** June 2012 EU Today Newsletter	2012-05-25 to 2012-06-25	2012-05-18 16:04:21	Insert is Approved and Active	INF	Drop Shipped	<a href="#">View</a>
*** May 2012 Electric Dispatch	2012-04-25 to 2012-05-24	2012-04-30 07:27:32	Insert is Approved and Active	INF	Drop Shipped	<a href="#">View</a>
*** May 2012 EU insert	2012-05-03 to 2012-06-01	2012-04-04 12:05:06	Insert is Approved and Active	INF	InfoSend Produced	<a href="#">View</a>

The Insert Management tool pre-populates forms with the user's information:



**Insert Request**

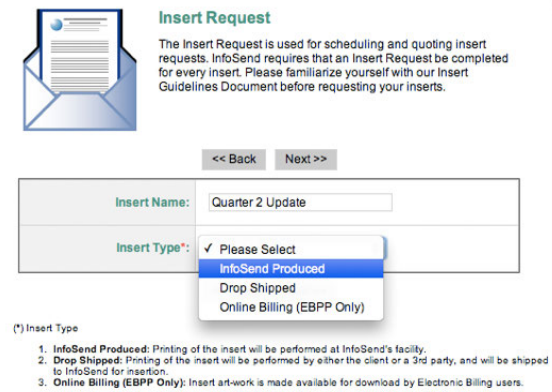
The Insert Request is used for scheduling and quoting insert requests. InfoSend requires that an Insert Request be completed for every insert. Please familiarize yourself with our Insert Guidelines Document before requesting your inserts.

Please take a moment to ensure that the contact information below is correct.

Close Next >>

Organization Name:	Demo Company
User Name:	Joe Rep
E-mail:	joe@client.com
Title/Department:	Finance
Street Address:	123 Main Street
City:	Sample City
State & Zip Code:	California 92807
Phone Number:	(800) 955 - 9330
After Hours Contact: <input type="checkbox"/> Same as above	Joe Rep - (800) 955-9330

This tool asks users to input an insert name as well as select the type of insert. InfoSend Produced Inserts will be printed at InfoSend's facility or a local offset printing partner, Drop Shipped inserts must be sent to InfoSend, and Online Billing inserts are electronically presented:



**Insert Request**

The Insert Request is used for scheduling and quoting insert requests. InfoSend requires that an Insert Request be completed for every insert. Please familiarize yourself with our Insert Guidelines Document before requesting your inserts.

<< Back Next >>

Insert Name:	Quarter 2 Update
Insert Type*:	<input checked="" type="checkbox"/> Please Select <input type="checkbox"/> InfoSend Produced <input type="checkbox"/> Drop Shipped <input type="checkbox"/> Online Billing (EBPP Only)

(\*) Insert Type

1. **InfoSend Produced:** Printing of the insert will be performed at InfoSend's facility.
2. **Drop Shipped:** Printing of the insert will be performed by either the client or a 3rd party, and will be shipped to InfoSend for insertion.
3. **Online Billing (EBPP Only):** Insert art-work is made available for download by Electronic Billing users.

For InfoSend Produced inserts, users are able to use the automated Insert Management tool to select insert printing specifications. This form also allows users to upload artwork files for review by InfoSend's team:

Insert Name:	Quarter 2 Update
Insert Type*:	InfoSend Produced
Paper:	White (24lb)
Insert Size:	8.5 x 3.66"
Duplex Printing:	<input checked="" type="checkbox"/>
Front Print Color:	4 Colors
Back Print Color:	Black Only
Folding Required:	Yes
Cutting Required:	<input checked="" type="checkbox"/>
Display with Online Bills:**	<input checked="" type="checkbox"/>
Art-work File:**	To help ensure accuracy, please attach a copy of the insert artwork. <input type="button" value="Choose File"/> Q2 Update.pdf

The tool allows users to designate the job types inserts should be included with, as well as specify the quantity and run dates. InfoSend also enables users to utilize selective inserting. Selective inserting is a dynamic technology that specifies which inserts will be included for certain account types:

Insert Name:	Quarter 2 Update
Insert Type:	InfoSend Produced
Insert With*:	<input type="checkbox"/> PARKING_CITATIONS (DMO) <input type="checkbox"/> PAST DUES (DMP) <input checked="" type="checkbox"/> STATEMENTS (INF)
Estimated Quantity:	150,000
Run Dates:	Start on Date & run until supply is depleted
Start Date:	08/29/2011 <input type="button" value="Calendar"/> (mm/dd/yyyy)
If Mail Piece Weight Exceeds 1 Ounce:	Please Contact Us Before Sending
Notes:	<div style="border: 1px solid gray; height: 80px; width: 100%;"></div>
Selective Inserting**:	<input type="checkbox"/>

Clients can also designate insert billing options on the next screen. Once the insert request has been completed, users will receive an email confirmation detailing the request. Users must authorize the confirmation before an insert request is activated.

**InfoSend Produced Insert Request**  
Please provide billing information.

<< Back   Next >>

Insert Name:	Quarter 2 Update
Insert Type:	InfoSend Produced
Billing Options:	<input checked="" type="checkbox"/> Please Choose <input type="checkbox"/> Regular Invoice <input type="checkbox"/> Separate Invoice, Instructions Below <input type="checkbox"/> Third-party Billing, Contact Information Below

**N. The Respondents must have the capability to print intelligent bill messages based on customer type, logos and usage history graphs, and multiple page bills as needed.**

**Message Manager**

This free account management tool is a custom-built web-based application that allows clients to control the messages that print on output. Clients can schedule the messages months or even years in advance, as well as set criteria to assign unique messages to different types of customers, or even to individual accounts. A PDF preview displays the message in the actual font that will be used.

**InfoSend Document Design Services**

- Customizable document look and feel for all clients providing "raw data" inputs, hosted and maintained by dedicated InfoSend staff.
- Experience with a wide array of industry-specific document types, including Government, Citations, Utility, Healthcare, Finance, Insurance and more.
- Client Services staff trained in the use of graphic design tools to ensure mockups are professional and accurate.
- During design and mockup, InfoSend advises on latest design best practices for consumer readability, response rate and USPS compliance.
- For documents with OCR, barcode or remittance requirements, full compliance with any specification, including lockbox testing with the delivery of production samples prior to Go-Live.
- Extensive experience, software and dedicated equipment for facilitation of both transactional and promotional documents: full-color Inkjet, high-capacity folding and cutting, and online tools for managing marketing copy or images.

## O. The City must receive billing data in a format mutually agreed upon by the firm and the City.

InfoSend acknowledges and accepts this requirement.

### InfoSend Data Processing Implementation Options

InfoSend's cloud-based Data Processing platform is a key engine in driving the overall CCM distribution platform. The Data Processing workflow has been designed from the beginning to flexibly accept client input in a wide variety of formats. While having domain expertise with clients within Government, Citations, Utility, Healthcare, Finance, Insurance, and more, InfoSend's technical experience and platform capabilities mean clients enjoy efficient and on-time implementations.

The Data Processing platform is capable of accepting data extracts from clients in a "flat-file" format (text, csv, XML, etc), as well as in a print-ready PDF format. InfoSend has unique expertise and knowledge working with print-ready PDFs efficiently, providing clients with options to dynamically modify the PDF output before final distribution. The system is capable of accepting multiple file inputs and formats to generate a single output stream, helping clients create more informative and complete communications.

No matter the source, all data is normalized within the InfoSend database, ensuring the distribution and reporting is seamless, transparent and meets client requirements.

#### Option 1 - Express PDF Implementation in Detail

This innovative solution gives clients the ability to use InfoSend's CCM platform at the lowest possible price point. It's most useful as a cost-saving option for clients with an existing document output, eliminating the need for a third party to design, program, implement and maintain hosted software to create a similar output.

InfoSend has a unique solution that can accept print-ready PDFs but still modify the output to drive mailing workflow and marketing messages. The Express PDF solution will parse and modify the addresses, using CASS certified address validation, apply postal barcodes to the finished output, then re-order the documents to meet USPS requirements. In addition, InfoSend's system can output marketing messages right on the output, or with additional pages to the document.

InfoSend's Express PDF Implementation is unique in that it's a hybrid solution that combines client-provided print files with InfoSend's data import and processing capabilities. We will not simply print image files, we will merge processed data from our system with client output to create a great finished product.

#### Option 2 - Data-Only Files (e.g. flat files, csv XML, etc) in Detail

InfoSend also designs, implements and hosts custom programs that can read "raw" client data extracts for distribution via the CCM platform. Common client export formats are XML, CSV, tab or pipe delimited, or SDF. InfoSend's experienced programmers will adapt the program to the client export file format instead of requiring conformity to a predefined template. InfoSend has successfully accepted data originating from nearly 100 billing systems – including both licensed and homegrown database platforms.

When this option is selected, InfoSend is able to offer the opportunity to redesign the bills to clients, as well as provide an "agnostic" hosted solution where client output can maintain a similar look and feel regardless of whether the client data system changes over time.

#### Business Logic and Output

No matter the input type, all client output is capable of leveraging InfoSend's CCM platform for dynamic marketing messages right on the output, or with additional pages to the document. Using criteria or flags in the data, InfoSend's platform can control the output to meet client requirements.

This programming may include placing selective messages on the document for specific customers, such as letting a customer know in bold lettering a balance is "Past Due." InfoSend's data processing also controls what happens downstream on machines at the print and mail facility, creating instructions to either include or exclude materials such as special inserts or return envelopes. InfoSend's CCM platform and years of experience ensure the client communications are done accurately and efficiently.

**P. The Respondents must provide all paper supplies including forms, envelopes and/or other paper stock necessary for performing printing, billing, and mailing functions as well as all required postal reports.**

**InfoSend Reliable Production and Materials**

- **Standardized Environment:** InfoSend's standardization in production and materials provides reliability and cost effectiveness for clients with a diverse array of needs across countless industries.
- **Effective Paper Stock:** Standard 24 lb. blank paper utilized to strike the right balance between cost and reliability.
- **Customized Perforation:** Multiple perforation locations are supported to ensure lockbox compatibility.
- **High Speed Digital Printing:** Printing using laser or inkjet technology: black, grayscale, black plus one or more spot colors and full color printing are all supported.
- **Effective Envelope Stock:** Standard and reliable outgoing #10 and return #9 envelopes predominantly manufactured and stocked by InfoSend and have strategically placed windows which allow client logos to be visible for the customer prior to opening, as well as tinting to ensure data privacy.
- **Computerized Mailpiece Inserting:** Documents at InfoSend are tagged and tracked through the production environment, including mail piece integrity software which ensures accurate insertion of the printed page into the envelope prior to delivery to the USPS.
- **USPS Compliance and Automation:** All documents are presorted prior to induction into the mail stream to ensure the lowest possible postage rate. InfoSend's Anaheim and Downers Grove facilities are each designated as a USPS Detached Mail Unit (DMU), meaning USPS personnel are onsite authorizing mail to head straight to regional sort centers and bypass the local office.

**Q. Customer Support – Respondents shall provide unlimited customer support during normal business hours.**

**InfoSend Client Services Support**

InfoSend's Client Services department provides web, phone and email support channels for clients, with dedicated support staff available to resolve client requests. Support staff is trained to monitor, analyze, escalate and respond to incoming requests, as well as provide proactive support in the event internal Quality Control procedures detect issues with client data.

- Dedicated Account Manager from implementation also assigned to monitor and provide support.
- Dedicated Support Staff for reviewing and responding to incoming issues.
- Multiple communication channels available for client preference: web support ticketing tool, email, and phone.
- Proactive support initiated by InfoSend staff when client data issues are detected by InfoSend Quality Control processes.
- Issues tracked via InfoSend CRM tool, ensuring full resolution before the ticket can be closed.

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. The following describes InfoSend's standard support coverage, the services that are included as part of annual software support, a listing of call priorities and an outline of escalation procedures.

InfoSend offers emergency an after-hours support line. An after-hours answering service is available 24/7/365. The answering service contacts InfoSend employees sequentially until one receives and acknowledges the call. Requests can be answered within 4 hours. InfoSend provides escalation phone number and contacts during the implementation. After-hours support may be billable. Please note, with the extensive support hours and support channels available, the after-hours answering service being used is extremely rare. Please see typical support channels overview below:

### Support Channels and Availability

InfoSend provides the following methods to be reached to initiate a support request:

- 800 Toll-Free Telephone support: (800) 955-9330
- Email via support@infosend.com
- Free electronic access 24 x 7 at www.infosend.com with the following online benefits:
  - Log, track & close support requests
  - View & update support requests
  - Access published documentation
  - Access available downloads
  - Download reports
  - View Job Tracking statistics
  - Download sample files in PDF format

Standard hours of support are from 6:00 AM Pacific to 6:00 PM Pacific, Monday through Friday, excluding designated statutory holidays. Weekend assistance is available and must be scheduled in advance and in most cases is billable.

InfoSend recognizes the below holidays and will be closed should they fall on a weekday.

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

### Inbound Support Ticketing, Escalation, and Resolution Workflow

All issues or questions reported to support can be tracked via an online support ticket. Account Managers can provide support via telephone, email or the online support ticket tool that can be accessed by logging into www.infosend.com.

6. **Contact Dedicated Account Manager:** Each web submission, call or email is handled with personal support. Clients receive support by contacting their dedicated Account Manager. If the client's dedicated contact is not available, the support request will be handled by another cross-trained Account Manager or Senior Account Manager. This representative will be your liaison through the support process, giving you a single point of contact for issue resolution.
7. **Request Logging:** Each support request can be logged using InfoSend's online Support Ticket Tool. Support Ticket requests are assigned a unique ID and can be viewed by both InfoSend Support and the client's authorized representatives. Support Ticket requests are archived and can be filtered by open and closed requests.
8. **Escalation Procedure:** InfoSend staff will internally escalate any required internal technical or operational resources to ensure that quality issues are resolved quickly and completely the first time. All necessary modifications are thoroughly tested before being applied to client applications to ensure that the final product meets quality expectations.
9. **Ticket Resolution:** Once an issue has been resolved, clients are notified of the solution and allowed to review new sets of samples to approve any changes. Extra attention is paid to the new job throughout our production, quality control and mailing process. When all parties confirm that the job is meeting quality expectations through every step in the process, we

will approve and release the job for completion.

10. **Client Satisfaction:** Any concerns or questions around the support being provided may be escalated to the Client Services Director.

### **Proactive File Halt, Validation Error and Quality Control Support Procedures**

InfoSend's data processing platform is designed to validate client data and will halt if any anomalies or incomplete data is detected. In addition, InfoSend's dedicated QC process will review all printed outputs to check for issues caused by client data. When issues are detected:

4. **Alert Notification:** InfoSend's internal system will automatically place the Job on hold, open a ticket and alert the CS department via an internal alert system, identifying the client and type of output.
5. **Assessment and Follow Up:** InfoSend's CS personnel will assess and then follow up with the relevant client contacts to notify of the issue.
6. **Resolution:** CS personnel will work with the client on how to address the data, either with a new data file or with programming adjustments.

### **File Cancellation and Document Pull Request Procedures**

InfoSend's CS department accepts requests to cancel entire batches or pull select documents from a batch as a standard function of the department. This request can be placed through InfoSend's online website support ticketing system, via email, or by calling the 800 number. The request is then documented by the CS team and communicated to the InfoSend production departments through our internal systems.

3. **File Cancellation:** These requests are typically submitted to InfoSend just after file transfer but before printing. InfoSend's CS personnel will immediately change the status of the Job to prevent any further progression through the InfoSend manufacturing environment and remove the Job batch from the queue. Clients utilizing the Sample Approval workflow will have the option to cancel their own job, which will then be removed from the queue.
4. **Pull Document Requests:** These requests are typically submitted by the Client after the file is processed and prior to mailing. Ideally, these requests would be submitted to the CS team prior to the mail piece receiving the "Quality Control" timestamp in the website's client-facing job tracking system. Once the job has been marked as completing Quality Control, it will be moved into Mail Preparation. For this reason, Pull Document Requests made after the job has passed through QC should be communicated directly via phone call to ensure that they are handled immediately to minimize the chance that the piece is processed for mailing. The document to be pulled will then be intercepted after the document is printed. Pulled documents can either be recycled or returned to the Client.

## **R. The City requires the vendor to provide staff the ability to reprint utility bills for customers.**

InfoSend is fully capable of meeting this requirement.

### **InfoSend Print Equipment**

#### **Printing Equipment:**

- Roll-fed full color (CMYK) inkjet printing is the primary production method.
- Production sheet-fed full color (CMYK) inkjet printing is also utilized
- Sheet-fed full color and monochrome laser printers for small or specialty jobs and reprints.
- Full-color capacity is over 130 million images per month via full color.
- InfoSend prints images well under capacity for business continuity, new installs, and spikes in volume.

## InfoSend Print and Mail Equipment Full Listing

### Printers

Type	Printer	QTY	Images per hour (total output if more than 1 machine)
Full Color	Canon Colorstream 6900	1	109,080
Full Color	Canon i300	1	18,000
Full Color	Ricoh Pro VC60000	1	128,820
Full Color	Ricoh Pro VC40000	2	128,820 and 153,000
Full Color	Xerox Rialto 900 MP	2	54,960
Full Color	Ricoh Pro C9100	1	6,600
Monochrome	Ricoh Pro 8320	1	8,160
Full Color	Bluecrest Accellejet	1	42,960
Full Color	Riso GD9630	7	67,200
Full Color	Riso GD9150	1	9,000
Monochrome	Kodak Digimaster HD150	3	27,000

### Inkjet Printing Technology

InfoSend operates roll-fed inkjet presses out of multiple facilities to enable true Disaster Recovery capabilities. Transactional documents can be printed using full-color production inkjet technology. Inserts can be digitally pre-printed as well as offset equivalent quality using the latest high-definition inkjet technology.

Maintenance contracts are in place with qualified vendors for all InfoSend equipment involved in the fulfillment of client documents. InfoSend carefully selects vendors and equipment to guarantee production of documents according to the Service Level Agreement (SLA) between InfoSend and its clients.

### Equipment Ages

#### Printers:

- Roll fed Inkjet printers - 2 years to 6 years
- Cut sheet inkjet printers - 1 year to 4 years
- Cut sheet laser printers - 2 years to 4 years

### S. The quality of the Respondent's work shall be consistent with USPS requirements and the City's expectations.

InfoSend is fully capable of meeting this requirement.

#### 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.

**T. Data formatting on the customer statement will be in accordance with the requirements established by City's bill design following award of the contract.**

InfoSend complies with this requirement. City of Lauderhill is an existing InfoSend customer in "Live" status. No lead time will be required for implementation.

**U. The Respondent's workmanship standards and responsibility for maintaining the integrity of City's statement processing without disruption will be a key area addressed prior to work beginning under the contract.**

InfoSend acknowledges this requirement.

**V. Statement format will include the option for City staff to add or change messages on the statements within clearly defined fields.**

**Message Manager**

This free account management tool is a custom-built web-based application that allows clients to control the messages that print on output. Clients can schedule the messages months or even years in advance, as well as set criteria to assign unique messages to different types of customers, or even to individual accounts. A PDF preview displays the message in the actual font that will be used.

**W. The firm will be responsible for the development of the program for extraction of the billing data (bill print files) sent from City billing system for creation of the utility bills.**

InfoSend complies with this requirement. The City of Lauderhill, FL is an existing InfoSend customer in "Live" status.

**X. Print billing statement on paper stock with minimum 600 x 600 dpi resolution.**

InfoSend complies with this requirement.

**Y. Folding and stuffing operations to be performed by automated machinery.**

**Inserting Equipment:**

- 4 to 6 station insert feeders and can be expanded if necessary.
- Supports various folds including "C", "V", "Z" and Double "V", etc.
- Capacity to finish over 86 million pieces per month.
- Mail Piece Integrity and Document Verification systems read OMR and industry standard barcodes such as 3 of 9, 2 of 5 Interleaved, 2D.
- InfoSend finishes mail pieces well under capacity for business continuity, new installs, and spikes in volume.

**Z. Firm will be responsible for paying all applicable postage fees and rates.**

InfoSend acknowledges and accepts this requirement.

InfoSend is the incumbent vendor and has postage on account for City of Lauderhill which is regularly replenished each billing period. The City is responsible for any USPS increases.

**AA. The Respondents shall prepare all statements except those noted through a customer type for insertion. A reply envelope shall be inserted in all bills for return payment unless an exception is made for a customer type to not receive an envelope such as an e-mail or bank draft account. Additional inserts are possible.**

InfoSend acknowledges and accepts this requirement.

**BB. City will deliver and/or transmit electronically informational inserts to the Respondents for insertion in customer bill envelopes.**

InfoSend acknowledges and accepts this requirement.

**CC. The inserts and/or letters and envelopes provided shall be designed to be consistent with billing system requirements and shall meet USPS regulations.**

InfoSend acknowledges and accepts this requirement.

**DD. The Respondents shall correct print errors and omissions at the Respondent's expense including, but not limited to, labor, supervision, supplies, postage, and all other expenses associated with correcting the error.**

InfoSend acknowledges and accepts this requirement.

### **InfoSend Quality Control Highlights**

- Company culture demands client satisfaction with over 99.99966% accuracy on an annual output in the tens of millions.
- Systems, personnel, and equipment are organized around well-defined processes that control and report the accuracy of work performed.
- Comprehensive Quality Control (QC) built into Data Processing platform, ensuring client output is verified prior to entering manufacturing environment.
- Unique QC process involving dedicated personnel and procedures executed after printing and designed to ensure consistent print quality and 100% accountability for each document
- Automated 2D Barcode Accuracy System utilized, providing individual document tracking and alerting to address errors (damaged or missing documents) real-time during fulfillment.
- Dedicated Quality Assurance Team that performs Root Cause Analysis, coordinates remediation and plans continual process improvements.

**EE. Respondents shall be responsible for preparing and mailing all utility bills for each billing cycle.**

InfoSend acknowledges and accepts this requirement.

**FF. The firm should allow the ability for City staff to approve, cancel, or hold individual bills based on predetermined criteria.**

**Sample Approval:** Optional workflow, allowing clients to view output and approve prior to manufacturing and distribution.

This optional workflow allows clients to download a sample of the output, with an included Process Summary report of the input/output counts, Inserts to be included, suppressions and a postage estimate. The sample file can contain the entire output or a subset based on client criteria. Upon approval, the sample output is released for production and distribution by InfoSend.



**GG. City will provide a sample listing of utility bill and fields from the current utility bill and all must appear on the re-design of the billing statement.**

InfoSend complies with this requirement.

# Detail Specification

## Statements

### **A. Regular City bills will be upload approximately sixteen times a month and may perform additional billing within the same month.**

InfoSend acknowledges and accepts this requirement.

### **B. Volume will vary depending on the cycle billed for that week. Holiday and weekend work are possible.**

Standard hours are from 6:00 AM Pacific to 6:00 PM Pacific, Monday through Friday, excluding designated statutory holidays. Weekend assistance is available and must be scheduled in advance and in most cases is billable.

InfoSend recognizes the below holidays and will be closed should they fall on a weekday.

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

### **C. City will provide bill files using an online upload or a standard FTP or transmission provided by the Respondent.**

InfoSend acknowledges and accepts this requirement.

#### **File Submission and Job Tracking**

Clients are able to upload files directly to InfoSend over the HTTPS connection, allowing users to send the input data for InfoSend processing on demand (note: PGP file encryption and secure FTP also available).

### **D. The statement will be folded, stuffed along with (1) one window #9 preprinted return envelopes into a (2) two window #10 envelopes to each customer for the U.S. Postal Service in order to receive the lowest possible First-Class postage rate.**

#### **USPS Compliance and Efficiency Highlights**

- InfoSend maintains ongoing USPS regulatory compliance and cost savings on behalf of clients, standard.
- Full Service with Intelligent Mail Barcode (IMb) certified, ensuring clients with qualified mailings receive lowest automated postage rate.
- Address validation applied via Coding Accuracy Support System (CASS) and Delivery Point Validation (DPV), improving the accuracy of addresses and lowering postage.
- Customer Move Updates optionally applied and reported via the NCOALink database or Address Change Service (ACS).
- USPS Seamless Acceptance Provider verifying mail electronically for acceptance
- Detached Mailing Unit (DMU) designation, with USPS personnel on-site at select InfoSend facilities, expediting mail entry into the USPS system and increasing overall efficiency.
- Ability to "house-hold" multiple documents intended for the same customer into a single envelope to provide postage

savings.

## **E. The Respondent must provide the ability for City staff to create ad hoc messaging to be printed on the bills, including the ability to upload images to the message area. Messages should also be able to be saved for reuse.**

InfoSend is fully capable of meeting this requirement.

**Message Manager:** Allows clients to self-administer ad-hoc and scheduled messaging on customer-facing output.

This free account management tool is a custom-built web-based application that allows clients to control the messages that print on output. Clients can schedule the messages months or even years in advance, as well as set criteria to assign unique messages to different types of customers, or even to individual accounts. A PDF preview displays the message in the actual font that will be used.

## **F. Respondents shall print Optical Character Recognition (OCR-B) for reading information on utility billing statement.**

For documents with OCR, barcode or remittance requirements, full compliance with any specification, including lockbox testing with the delivery of production samples prior to Go-Live.

## **G. Respondents shall include point of delivery bar coding as required by the United States Postal Service on utility billing statement (read through mailing address window) and return envelope.**

### **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.

## **H. Provide electronic bill presentation, electronic file generation and archiving and other related services. The Respondents will provide capabilities for receiving and verifying accurate receipt of the bill print files.**

### **InfoSend's Electronic Billing, Payment and Presentment (EBPP) Solution**

As part of InfoSend's comprehensive, single-source Customer Engagement (CE) platform, InfoSend's Electronic Billing, Payment and Presentment (EBPP) solution allows clients to interact with their customers across multiple channels. Driven by InfoSend's Customer Communications Management (CCM), customer preferences on how and where they'd like to be contacted, with mobile, web, IVR and SMS available.

- **Mobile-Ready Customer Engagement:** all products are mobile compatible out of the box, with no app store downloads required of customers. Powered by InfoSend's CCM platform, customer specific messaging extends to the electronic channel.
- **Multi-Channel Payment Collection:** InfoSend's payment platform will consolidate web, telephone, SMS, CSR, in-person EMV and bank payments into a single lockbox file.
- **One-Time and Automatic Payments:** allow customers to quickly make a one time payment, as well as sign up to have their payment account auto debited with each billing cycle.
- **Paperless Bill Notification and Presentment:** notify customers via email when a new bill is available, and securely deliver exact replica of printed document to customers via the secure portal.
- **Interactive Voice Response (IVR):** accept customer payments via automated phone service with InfoSend-hosted phone number, enabling client phone systems to redirect customers with ease.

- **SMS Text-to-Pay:** enrolled customers may opt in to receive text notifications of new bills, and reply to have the registered payment method drafted for the amount due, speeding up the time to payment.
- **Bank Payments (MasterCard RPPS):** InfoSend can collect payments made via the customer bank and include them within the lockbox file.
- **PCI-Compliant Cloud Based Solution:** electronic billing and payment related products hosted in the cloud by InfoSend in a secure PCI-Level 1 compliant environment.

## InfoSend Archiving Services Highlights

- **Multiple Channels:** Capable of hosting documents within an InfoSend database as well as shipping PDFs via secure FTP or DVD media.
- **InfoSend Hosted Option:** Secure cloud solution where InfoSend hosts documents for a client-specified historical retention, allowing for reprints and emailing documents on demand.
- **API Access for Hosted Docs:** For clients who choose to have InfoSend host, an API is made available that enables paperless integrations with ERP/CIS/billing systems, as well as online payment providers.
- **Insert Communications Included:** The InfoSend system is also capable of including the insert communications as additional pages in the PDF (eInserts), ensuring clients and their customers are viewing the complete document which was distributed.
- **USPS Mail Tracking:** For clients using the hosted solution, USPS mail tracking info is provided for eligible First Class mail, using the IMb Tracing™ service.
- **Remit Tracking:** Also, for clients using the hosted solution, InfoSend can provide a report of checks mailed back by customers using the included remit stub. A daily report of customer mail and amounts due will be provided, assisting clients with cashflow expectations.
- **Final Document Transfer:** InfoSend can push PDFs via secure FTP in a standard or customized format, allowing clients or third parties to archive documents on other systems.

**I. The City's specification requires bills to be produced on 24 LB white paper with a pre-printed front and back. Customer payment stub will be perforated and adhere to City's current lockbox specifications (see Exhibit A).**

## InfoSend Reliable Production and Materials

- **Standardized Environment:** InfoSend's standardization in production and materials provides reliability and cost effectiveness for clients with a diverse array of needs across countless industries.
- **Effective Paper Stock:** Standard 24 lb. blank paper utilized to strike the right balance between cost and reliability.
- **Customized Perforation:** Multiple perforation locations are supported to ensure lockbox compatibility.
- **High Speed Digital Printing:** Printing using laser or inkjet technology: black, grayscale, black plus one or more spot colors and full color printing are all supported.
- **Effective Envelope Stock:** Standard and reliable outgoing #10 and return #9 envelopes predominantly manufactured and stocked by InfoSend and have strategically placed windows which allow client logos to be visible for the customer prior to opening, as well as tinting to ensure data privacy.
- **Computerized Mailpiece Inserting:** Documents at InfoSend are tagged and tracked through the production environment, including mailpiece integrity software which ensures accurate insertion of the printed page into the envelope prior to delivery to the USPS.
- **USPS Compliance and Automation:** All documents are presorted prior to induction into the mail stream to ensure the lowest possible postage rate. InfoSend's Anaheim and Downers Grove facilities are each designated as a USPS Detached Mail Unit (DMU), meaning USPS personnel are onsite authorizing mail to head straight to regional sort centers and bypass the local office.

## BankUp Lockbox Services

InfoSend partners with BankUp Corporation to provide Accounts Receivable and Accounts Payable automation for clients. Bank Up provides comprehensive solutions to assist municipalities, government agencies, utilities, financial institutions, healthcare providers, property managers, insurance companies and other commercial customers in managing and mobilizing funds, reducing operating costs and improving operational efficiencies while increasing customer satisfaction. The InfoSend/BankUp partnership enables billers to process payments through either an outsourced lockbox solution or on-premise utilizing Bank Up's proprietary technology.

### BankUp Solutions

- Outsourced Lockbox Processing provides billers with a secure, reliable location to have payments mailed and processed. Payments are guaranteed to be processed and funds deposited to biller banks the same day that payments are received
- All payments processed are electronically uploaded via Check 21 to biller banks each day
- All payments are placed into an electronic payment file and uploaded each day to the biller's CIS
- All processed payments (remittances and checks) are available online through the BankUp Customer Service Interface/Image Archive
- eLockbox provides a solution for billers to receive electronic deposits of customers' home banking bill-pay checks from thousands of financial institutions instead of paper checks with no accompanying remittance document. These payments become part of the daily payment file upload to the biller's CIS
- FLEXRPS is Bank Up's on-premise solution which provides all of the same capabilities as lockbox except that payments are processed by the biller utilizing Bank Up's proprietary technology
- Advanced Invoice Data Capture provides an outsourced solution for those billers looking to automate the AP process. BankUp's solution provides automation to improve efficiencies, reduces invoice processing time, provides approval automation and uploads AP data into any ERP or accounting system

BankUp works closely with InfoSend and their billers to define the bill presentment parameters, create and test all printed documents to ensure feasibility of integrating with all Bank Up processing technology.

## J. Describe software and hardware upgrade methods, policies and procedures.

### InfoSend System and Software Updates Highlights

- Dedicated staff for Research and Development, ensuring InfoSend products and services evolve continually.
- System Architecture separates client-specific programming from core system workflow, ensuring backwards compatibility and eliminating client impact during key platform security upgrades and enhancements.
- Agile methodologies used, allowing team to prioritize and ship critical updates quickly and on-demand.
- Changes to the system must undergo rigorous regression testing in a test environment, with software changes following OWASP standards.
- Requests for system improvements directed to the client Account Manager are escalated to the development team for analysis, feedback and release timeline.
- System enhancements communicated via periodic email updates, with dedicated client Account Manager available to assist further.

## K. Describe your process for handling international mailing addresses

International mail is metered based on the required postage rate for the destination country.

## L. Identify and flow chart process from the receipt of file through the delivery process from City to the USPS.

### InfoSend Data Process Flow

InfoSend's Customer Communications Management (CCM) platform is designed to securely and efficiently accept, process and output client data to customers in a reliable and transparent manner. The data flow for InfoSend entails:

1. **Client Input-Data Transfer and Acknowledgement**
2. **Data Processing and Validation**
3. **Document Composition and Sample Approval**
4. **Printing**
5. **Quality Control**
6. **Mailing and Electronic Distribution**
7. **Confirmation and Reporting**

#### 1. Client Input-Data Transfer and Acknowledgement

- **Secure File Upload Options:** On a 24/7 basis, data files can be sent to InfoSend via FTP or SFTP or clients can also log in to InfoSend's secure website and upload files using the HTTPS file upload method. Optionally, and depending on client security requirements, password protected or PGP/GPG encryption can be utilized on the files. When a file is received, it is automatically time-stamped and logged in InfoSend's Job Tracking database.
- **Duplicate File Prevention:** All data transfers are checked against an archive of file-level hashes and if a match is found, the system will detect the file as a duplicate. If a duplicate is detected, the processing program is halted and a warning is generated, calling for immediate follow up by InfoSend support personnel.
- **Multi-File Inputs:** InfoSend's system can be configured to create batches based on multiple source files, as well as wait a predetermined amount of time for more client records to be transferred before beginning the batch processing.
- **Process Confirmation:** Successfully transferred files are identified by client input type, resulting in a confirmation receipt sent.

#### 2. Data Processing and Validation

- **File Integrity:** Each of InfoSend's programs is custom made to work with the clients' specific data file format. Incomplete or erroneous data will result in a program halt, issuing a warning that is escalated to InfoSend support personnel for immediate follow up.
- **Data Checks:** InfoSend programs are set up to check for individual data fields and halt if criteria are not met—for example if a date field contains a value older than an acceptable threshold. All data check halts issue a warning and escalation to InfoSend support personnel.

#### 3. Document Composition and Sample Approval

- **Job Batch Creation:** InfoSend's system will take validated input data and begin processing by assigning a unique production Job Code specific to the client input file(s). This Job Code identifies and accompanies the output through InfoSend's processing.
- **Document Layout and Business Logic:** The input data is rendered by the InfoSend application, resulting in the layout defined during the implementation. Any client defined special business logic conditions are applied at this time.
- **USPS & Special Messaging:** During processing, the system will also validate customer mailing addresses, optionally apply National Change of Address (NCOA) updates, and perform record suppression based on client-defined criteria. The system also performs USPS pre-sorting of records, applying the Intelligent Mail Barcode (IMB) and ensuring the records are in the correct order to maximize postal efficiency. Additionally, InfoSend's CCM platform will check the database for any scheduled messages or inserts to be included with the output.
- **Rendered Output and Sample Review:** Once a file has successfully been rendered, clients have the option to review a sample file containing a PDF output of the documents. Sample outputs can contain a percentage of or the complete output and

includes a Process Summary report cover page which lists details on the output work to be performed by InfoSend. Clients are provided the option to either reject and resend their data file with corrections or approve the batch. Once files are approved, an email confirmation of the approval is sent, and the output is released to the manufacturing environment for distribution.

#### 4. Printing

- **Job Priority:** Jobs are printed on an as-received basis, with jobs requiring the shortest turnaround time given priority. InfoSend is committed to meeting the agreed upon mail turnaround times for all clients simultaneously and is staffed and equipped accordingly.
- **Operator Controls:** Once a sample file batch has been approved for printing, files are sent to the print production queue. InfoSend's unique Central Print program monitors print jobs in the production department, prohibiting a job from being printed more than once, and provides operator controls including timestamps of printing time and other tracking metrics. InfoSend production staff with appropriate permissions are granted access to queued files.
- **Job Ticket:** A job ticket is attached during processing to each production run. A job ticket contains information such as printing specifications, form type, envelope options, and whether an insert should accompany the file. The job ticket is printed in our production department and remains with a job until it is released to the USPS for mailing.

#### 5. Quality Control

- **Dedicated Workflow and Staffing:** InfoSend's emphasis on quality and customer satisfaction requires a dedicated step and operator role in the process to validate the printed output. This step in the process takes place after printing but before distribution. Each job is thoroughly checked a minimum of 4 times for general alignment, printing, color or mailing address block issues which would result in problematic processing or mailing: before printing, after printing, upon delivery to the QC department and finally upon delivery to the mailing department.
- **Uniquely Tailored QC Program:** InfoSend has an internally developed workflow that provides onscreen prompts to QC personnel, requesting they check for bill specific information (such as customer name, account number, address) on randomly selected pages throughout the batch. These onscreen prompts are customized to the client's data and ensure the integrity of data throughout the batch before releasing for distribution.

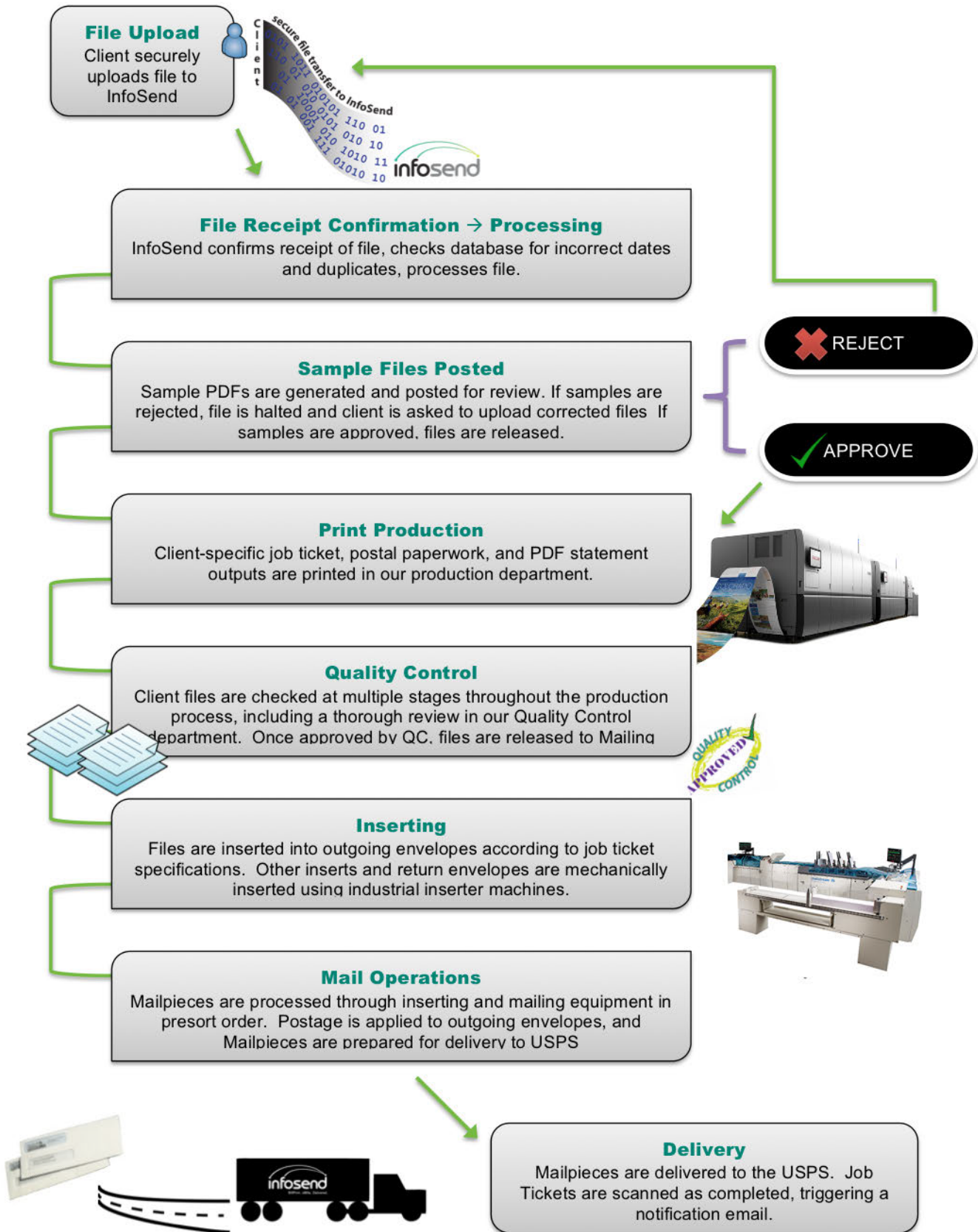
#### 6. Mailing and Electronic Distribution

- **Mailing Department:** Once a job has gone through Quality Control, it is released to the printing department for fulfillment. All printed pages are matched to the correct materials per the Job Ticket and inserted into the envelope for mailing. Mail that has been inserted is then delivered to the USPS with the appropriate postal paperwork for the USPS to validate prior to induction. Upon delivery to the USPS, either at the onsite Detached Mail Unit (DMU) or local distribution center, the job batch is scanned as completed by an InfoSend operator.
- **Electronic, Multi-Channel Distribution:** Upon completion of the job batch, InfoSend's CCM platform begins the electronic distribution of customer records to the InfoSend archive, hosted eBusiness system, back to the client, or other third party distribution networks.

#### 7. Confirmation and Reporting

- **Process Confirmation:** Once InfoSend has completed the distribution of the client job batch, a confirmation receipt is sent to the client with details on the job batch execution. This receipt serves as the final notification regarding the input data received.
- **Reporting:** InfoSend's platform also provides robust reporting back to clients on the output services performed. InfoSend offers detailed address update and suppression reporting, as well as customized, detailed breakdown of the fulfillment.

# Data Processing Workflow Diagram:



**M. Describe your capability to print certain declarations on the invoice such as past due balance, credit balance, in a different color.**

**InfoSend Document Design Services Highlights**

- Customizable document looks and feel for all clients providing "raw data" inputs, hosted and maintained by dedicated InfoSend staff.
- Experience with a wide array of industry-specific document types, including Government, Citations, Utility, Healthcare, Finance, Insurance and more.
- Client Services staff trained in the use of graphic design tools to ensure mockups are professional and accurate.
- During design and mockup, InfoSend advises on latest design best practices for consumer readability, response rate and USPS compliance.
- For documents with OCR, barcode or remittance requirements, full compliance with any specification, including lockbox testing with the delivery of production samples prior to Go-Live.
- Extensive experience, software and dedicated equipment for facilitation of both transactional and promotional documents: full-color Inkjet, high-capacity folding and

# Inserts

**A. Provide the City with the option to insert additional pieces of information literature into the #10 envelope along with the billing statement.**

## InfoSend Direct Communication Service Highlights

- **Single Source Production:** InfoSend produced one-time or recurring print runs for special outbound customer communications; avoid juggling vendors and excessive drop shipping costs by producing content with InfoSend.
- **High Quality Output Range:** Support for low cost black and white through full color communications on uncoated or glossy paper stock. Communication can be:
  - Buck Slips
  - Postcards
  - Letters
  - Flyers
  - Folded Brochures
- **Online Management & Excellent Customer Service:** Dedicated online web request tools and support personnel that provide quotes for any required services, from artwork design through fulfillment.
- **Selective Inserting:** Support for inserting materials within existing customer transactional document, with the capability to selectively insert for specific customers based on client criteria.
- **Inline and Electronic Inserting:** Support for printing marketing materials on the fly, "inline" with customer transactional billing document, as well as show with electronic images produced by InfoSend, for just-in-time manufacturing and reduced postage costs.
- **Envelope Messaging:** Ability to apply special messages that show through windows or directly on the envelope to ensure customer visibility.

**B. The City will occasionally generate inserts, letters and/or notices for mailing. This process may be performed monthly, quarterly, and/or yearly.**

**Insert Handling – Client Provided** - Any special inserts/flyers/stuffers prepared by the client can be inserted with the bills. Clients can drop inserts off or have them shipped to InfoSend where they will be kept in inventory until the end of the run date.

# Mailing

**A. Respondents shall sort, bundle, tray, prepare all postal forms and deliver finished mail to U.S. Postal Service adhering to all applicable U.S. Postage Service Regulations. Regulations.**

InfoSend acknowledges and accepts this requirement.

**B. The Respondents shall process mail through a presort routine which will attach and interface the CASS certified barcode for all qualified pieces and satisfy all documentation requirements of the USPS.**

## **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.

**C. Respondent's service shall include certification of the City's mailing list to U.S. Postal Service, including 100% point of destination bar codes and qualifying all work for appropriate postal discounts.**

InfoSend complies with this requirement.

## **USPS Compliance and Efficiency Highlights**

- InfoSend maintains ongoing USPS regulatory compliance and cost savings on behalf of clients, standard.
- Full Service with Intelligent Mail Barcode (IMb) certified, ensuring clients with qualified mailings receive lowest automated postage rate.
- Address validation applied via Coding Accuracy Support System (CASS) and Delivery Point Validation (DPV), improving the accuracy of addresses and lowering postage.
- Customer Move Updates optionally applied and reported via the NCOALink database or Address Change Service (ACS).
- USPS Seamless Acceptance Provider verifying mail electronically for acceptance
- Detached Mailing Unit (DMU) designation, with USPS personnel on-site at select InfoSend facilities, expediting mail entry into the USPS system and increasing overall efficiency.
- Ability to "house-hold" multiple documents intended for the same customer into a single envelope to provide postage savings.

**D. Each utility billing statement shall be addressed to each customer with point of delivery bar code for U.S. Postal Service in order to receive the lowest possible First-Class postage rate.**

InfoSend complies with this requirement.

**E. Respondents shall be responsible for paying all applicable postage fees and rates through the USPS at the time of each mailing.**

InfoSend acknowledges and accepts this requirement.

## **F. Respondents shall provide proof of postage and an invoice to the City for repayment of postage fees at a cost based on the lowest applicable postage rate – with no markup for postage.**

### **USPS Compliance and Efficiency**

InfoSend's Customer Communications Management (CCM) platform allows InfoSend to distribute client output to multiple channels, including mail via USPS. InfoSend, as a mailing service provider, maintains technology and USPS compliance to ensure clients are getting the best postage rates and features from mailings.

Postage is the *most expensive component* of mailed document production, a very important cost consideration when selecting a document production partner and not all vendors provide the most cost-saving discounts available. 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 \$0.005 on each qualifying mail piece below the normal lowest pre-sort 5-digit postage rate. InfoSend, by default, will implement the Full-Service Intelligent Mail barcode within client documents produced, saving clients many thousands of dollars in postage costs.

#### **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.

#### **USPS Seamless Acceptance**

InfoSend manages USPS compliance by maintaining regulatory and processing standards as a Full-Service provider of the USPS, and has certified as a Seamless Acceptance provider for verifying mail electronically for acceptance. InfoSend meets all mail piece design standards for document design internally as well as maintains USPS business relationship account status with the USPS. InfoSend maintains USPS quality data compliance utilizing USPS approved CASS/Pave, presorting and move update software (BCC Software) to perform address hygiene, achieves optimal postal discounts and applies move updates along with associated reporting.

### **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.

### **InfoSend Invoicing**

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 and 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.

### **Postage Deposit**

InfoSend is the incumbent vendor and has postage on account for City of Lauderhill which is regularly replenished each billing period. The City is responsible for any USPS increases.



AMOUNT PAID	DATE	INVOICE NO.
	2/29/2018	131263

ATTN:  
 SAMPLE CUSTOMER  
 PO BOX 1234  
 ANAHEIM, CA 92807-1234

TERMS	DUE DATE	P.O #	ACCOUNT #	INVOICE
NET 30	3/19/2018		5320	131263

DATE	DESCRIPTION	QTY	RATE	AMOUNT
2/15/18	ABC1214A: Statement Data Processing/Print/Mail Prep Service	37,303		
	ABC1214A: 8.5 x 11 Form	37,303		
	ABC1214A: #10 Standard Envelope	37,300		
	ABC1214A: Standard #9 Return Envelope	37,267		
	ABC1214A: Statement Postage (Level-1 Sort) (37,296 Mailpieces)	1		
	ABC1214A: Statement Postage (Non Bar-Code) (7 Mailpieces)	1		
	ABC1214A: Address Update	16		
	ABC1214A: Print Image Archiving - 12 Months Retention	37,303		
	ABC1214A: CHW 1214STMT 0011.PDF			
THANK YOU FOR YOUR BUSINESS		<b>Total</b>		

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

**G. All mail shall meet First Class automation rate requirements to obtain the lowest possible postage rates and maximize postal discounts.**

**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 \$0.005 on each qualifying mail piece below the normal lowest pre-sort 5-digit postage rate. InfoSend, by default, will implement the Full-Service Intelligent Mail barcode within client documents produced, saving clients many thousands of dollars in postage costs.

**H. The Respondents shall guarantee that the completed work will reach the United States Postal Service (USPS) each billing day.**

InfoSend acknowledges and accepts this requirement.

**I. Should mailings not be delivered to the USPS in a regular and timely manner, liquidated damages shall be assessed. Additionally, contract termination may result.**

InfoSend acknowledges and accepts this requirement.

# Reporting

**A. The Respondents shall provide a report after each day's billing with the number of envelopes mailed and the amount of postage to the City daily.**

## Job Tracking Tool

The Job Tracker provides the current status of jobs as it progresses through InfoSend's data processing and print production departments. The Job Tracking tool contains details such as job type, number of component files that are contained within the job, file receipt timestamps, sample files that may be downloaded and the status of printing/quality control/mail preparation. Once a file has been completed for mailing and mail pieces have been released to the USPS a timestamp of file completion confirmation will be provided. InfoSend provides a history of the past 100 jobs that were processed through the system.

The screenshot shows the 'Job Tracking' interface. It includes a header, a description of the job list, and a table with columns: Job Type, Job Code, Filename, Received, Processing, Sample File, Sample Status, Printing, QC, Mail Prep., and Confirmation Viewed. The table lists three jobs: RETURN\_BILLS, REGULAR\_BILLS, and DELINQUENT\_NOTICE.

Job Type	Job Code	Filename	Received	Processing	Sample File	Sample Status	Printing	QC	Mail Prep.	Confirmation Viewed
RETURN_BILLS	INF0323B	RETURNS.2012.TXT	2012-03-23 10:28:01	Done	Pending	Pending	Pending	Pending	Pending	Pending
REGULAR_BILLS	IN10323A	REGULARS.2012.TXT	2012-03-23 10:28:01	Done	Pending	Pending	Pending	Pending	Pending	Pending
DELINQUENT_NOTICE	IN10323A	DELINQUENTS.2012.TXT	2012-03-23 10:28:01	Done	2012-03-23 10:45:08	Approve Reject	Pending	Pending	Pending	Pending

**B. For billing purposes, the Respondents shall provide a report monthly detailing the number of envelopes mailed and the amount of postage used for the month.**

## InfoSend Invoicing Highlights

- Accurate counts driven by data processing engine, reconciled and controlled for accuracy
- Physical mail and electronic mail invoice options
- Weekly, bi-monthly and monthly invoice schedules available to meet client needs
- Itemized processing option available in Excel, allowing clients to analyze, group and sort as desired

**C. The Respondents shall conduct quality assurance protocols reconciling billing information received from the City with bill print output upon completion of data processing and generation of customer bill statements.**

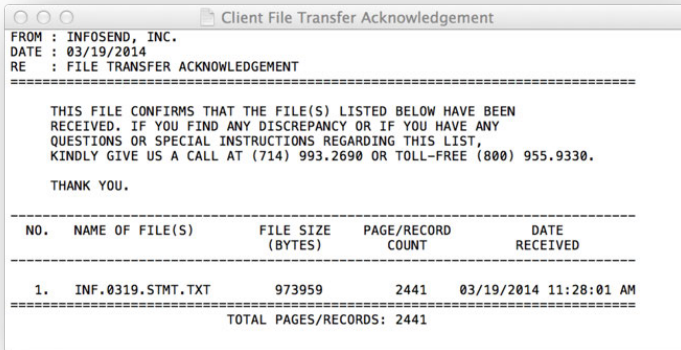
For clients that would prefer to work with the invoice data for additional levels of reconciliation, InfoSend also provides a Process Detail Report for all billable items in a CSV format that may be loaded into Excel. This report for the invoice allows clients to group, sum and analyze the itemized billable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

Job Code	Client ID	Cycle ID	Item Description	Pages	Qty	Rate	Total
1	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

## D. Respondent must provide an e-mail confirming receipt of the file transmission.

### File Transfer Acknowledgement Report

Upon client upload of a data file for processing, InfoSend will send the File Transfer Acknowledgement Report as certification of receipt of the file. The File Transfer Acknowledgement Report provides information about the file name, byte size, page/record count and file receipt date. This report is posted to InfoSend's secure web portal for viewing and is also commonly emailed to designated client staff members.



## E. Daily Production Confirmation Reports via email. Immediately after the processing of the bills is complete a confirmation of completion transmission should be sent with the volume of bills received for processing, the number of bills printed, the number of bills merged into one envelope and the number of bills not printed.

### 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. The Process Confirmation Report can be created in one of three different formats: plain text, XML or HTML.

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.

PROCESS CONFIRMATION REPORT

TO : INFOSEND CLIENT

FROM : INFOSEND, INC.  
 DATE : 03/20/2014  
 RE : PROCESSING CONFIRMATION REPORT

=====

IF YOU HAVE ANY QUESTIONS ABOUT THIS DOCUMENT, PLEASE CONTACT US AT  
 (714) 993.2690 OR TOLL-FREE (800) 955.9330. THANK YOU.

=====

NO.	REFERENCE	AMOUNT(\$)	ORIGINAL	SINGLES	MULTIPLES	UAR/SPECIAL	TOTAL
1.	DLY0319A	332950.60	2441	2363	27	0	2390
STATEMENT DATE: 3/19/2014							
FROM: DLY.0319.STMT.TXT							
=====							
TOTALS =		332950.60	2441	2363	27	0	2390
=====							

\*\*\* END OF PROCESS CONFIRMATION \*\*\*

INFOSEND CLIENT  
 UNDELIVERABLE ADDRESS REPORT

DATE: 03/20/2014  
 PAGE: 1

FILENAME: DLY0319A[DLY.0319.STMT.TXT]

NO.	ACCOUNT	ERROR CODE ERROR MESSAGE	AMOUNT
1.	01212460-56 SAMPLE C 101 HALL STREET DALY CITY CA 94015	411 - Mailed out anyway Invalid Primary Number	51.63
2.	19418560-48 SAMPLE CUSTOM 124 BALMOR TERRACE SAN FRANCISCO CA 94112	491 - Mailed out anyway ZIP+4 coded but failed DPV	80.36

F. Daily report showing the customers that had an address change with the following: • Customer name, • Utility account number, • Previous address (address from City software), • New address (address from USPS).

### Address Update Report

Address Updates including NCOALink hits or ACS updates are provided in InfoSend's reporting section. The ACS/NCOALink report is available in three formats: plain text comma delimited, XML or HTML. Most address update reports are either comma delimited or XML formatted so that InfoSend's clients can automate the process of loading updates into their customer information system.

#### Address Updates

You may view your ACS/NCOA reports by clicking on the corresponding links.

Date	Jobcode	Viewed
2014-03-20 12:10:45	<a href="#">N_DLY0319A</a>	<input type="checkbox"/>
2014-03-14 16:54:16	<a href="#">N_DLY0313A</a>	<input type="checkbox"/>
2014-03-07 13:08:08	<a href="#">N_DLY0306A</a>	<input type="checkbox"/>
2014-03-04 16:50:55	<a href="#">N_DLY0304A</a>	<input type="checkbox"/>

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	MailSequenc	MailerID	JobCode	AccountNum	OAddr1	OAddr2	OCity	OSt	OZip	MAddr1	MAddr2	MCity	MSt	MZip	COAType	Reason
2	700003880	107115	INF0307A	000000-01	123 Water St		WOODLAND CA		91364	123 Water St		Woodland HI CA		91367-4545	NCOA	
3	700004170	107115	INF0307A	000000-02	4240 E La Palma		LOS ANGELES CA		90011-5518	4240 E La Palma		Los Angeles CA		90011-3329	NCOA	
4	700004156	107115	INF0307A	000000-03	5454 Main St		LOS ANGELES CA		90011-3721	5454 Main St		LOS ANGELES CA		90011-3721	UAA	491-ZIP+4 coded but failed DPV because of invalid primary
5	700004182	107115	INF0307A	000000-04	456 Water St		TORRANCE CA		90501	456 Water St		TORRANCE CA		90501	UAA	411-Invalid Primary Number
6	700004080	107115	INF0307A	000000-05	124 Water St		LOS ANGELES CA		90013	124 Water St		LOS ANGELES CA		90013	UAA	491-ZIP+4 coded but failed DPV because of invalid primary
7	700004048	107115	INF0307A	000000-06	4241 E La Palma		LONG BEACH CA		90802	4241 E La Palma		LONG BEACH CA		90802	UAA	491-ZIP+4 coded but failed DPV because of invalid primary
8	700003938	107115	INF0307A	000000-07	5455 Main St		LOS ANGELES CA		90007	5455 Main St		LOS ANGELES CA		90007	RETURN-UAA	V - Vacant
9	700003967	107115	INF0307A	000000-07	5455 Main St		LOS ANGELES CA		90007	5455 Main St		LOS ANGELES CA		90007	RETURN-COA	
10																

## G. The City should be able to track all files that have been sent to the Respondent - before, during, and after processing.

### 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.

## H. Status reports must be provided daily after processing is complete.

### Process Summary Report

The Process Summary Report is a detailed PDF document that summarizes key data points contained within a document run batch. If a client chooses to review sample files prior to printing, the Process Summary Report will be included as a cover page within each set of samples. It is also posted to InfoSend's "Reports" tab of the web portal in PDF form. The Process Summary Report details important information such as data files that were included within the job, document details such as page count and batch amount if documents are bills, print output information, suppressions, inserts included, and USPS presort counts and estimated postage.

Data Files	
Filename	File Received
INFOSEND_BILLINGDATA_20130929A.TXT	2013-09-29 09:25am
INFOSEND_CYCLEDATA_20130929A.TXT	2013-09-29 09:25am

Document Input			
Accounts	First Pages	Total Pages	Batch Amount
12,000	12,000	18,000	\$900,000.00

Print Output							
Accounts	First Pages	Total Pages	Amount	Mailpieces	Non-Barcoded Mailpieces	Householded Mailpieces	NCOA Updates
11,000	10,000	14,000	\$800,000.00	10,005	77	95	38

Suppressions				
Accounts	First Pages	Total Pages	Amount	Name
250	250	250	\$25,000	Undeliverable Address
250	250	250	\$25,000	Client Suppression Rule(s)
250	250	250	\$25,000	eBilling Paperless Suppression
250	250	250	\$25,000	InfoSend Exception Processing

Inserts	
Name	Count
N3896 - Online Payment Options	5,460
N3904 - Fall Water Conservation	10,000

Postage Summary		
Name	Count	Amount
Presorted Mailpieces	9,000	\$3690.00
Non-Presorted Mailpieces	500	\$220.00
Non-Barcoded Mailpieces	350	\$154.00
Extra Postage (Non-Standard Mailpiece)	150	\$112.50

# Quality Control/Reporting

**A. Please provide procedures for ensuring that the bill file transmissions are completed successfully and procedures for correcting issues.**

## InfoSend Service Level Agreement

InfoSend's Customer Communications Management (CCM) platform, eBusiness applications and document manufacturing environments are designed with business continuity and reliability in mind. All client contracts are backed by Service Level Agreements (SLAs) to give clients the assurance that data processing, document production and distribution, and eBusiness applications will perform accurately and on time. During its entire history in business, InfoSend has never lost a client due to failure to deliver on an SLA.

A sample SLA is provided below, however, InfoSend routinely collaborates with clients on an SLA that suits the dynamics of their particular data, documents or eBusiness applications.

### Sample SLA:

InfoSend agrees to the following Service Level Agreement ("SLA") with penalties for non-compliance during delivery of InfoSend services detailed in this agreement. The SLA applies even in the case of a routine natural disaster (such as an earthquake or fire) or other issues that necessitate the transfer of the Service to a disaster recovery facility. SLA penalties do not apply if errors or delays are caused by Client or if there is a serious issue such as an act of war or region-wide calamity that no company could prevent against using commercially available disaster preparedness techniques. InfoSend and Client agree on the following SLA:

- InfoSend hosted web applications will maintain a 99.99% uptime.
- Documents will be produced and distributed exactly as displayed in the Client-approved sample file.
- Documents will be printed on the correct forms and inserted into the correct envelopes.
- The documents will be printed and mailed the next business day.
- Completed job batch reports will be provided within 24 hours.
- Planned system maintenance will be communicated by InfoSend in advance.

If the above SLA is not met, a 10% Service Fee penalty will be provided for each business day that a batch of documents is delayed. The penalty would apply to InfoSend's Service Fees only and not to postage or materials (printed stock, envelope stock, etc.). If the data is not output as displayed in the Client-approved sample file, a 50% Service Fee credit will be provided if the issue did not impact all documents in the batch or did not impact the ability for customers to understand the documents and remit payments. If the issue affected all documents in the batch or impacted the ability for the customer to understand the document, a 100% Service Fee credit will be applied (e.g. inaccurate data was printed due to an InfoSend data processing error).

**B. The Respondents will make any and all reliable staff available to assist in resolving any and all data receipt problems, which must be resolved within the current business day.**

InfoSend acknowledges and accepts this requirement. Please refer to page 15 for detailed information about our Client Services Support.

**C. The Respondents shall establish and maintain quality control procedures to facilitate logging, tracking, and checking all items from the time they enter the Respondent's system through the time they are transferred for inserting and mailing. This process should be available to City staff.**

InfoSend complies with this requirement.

## InfoSend Quality Control Highlights

- Company culture demands client satisfaction with over 99.99966% accuracy on an annual output in the tens of millions.
- Systems, personnel, and equipment are organized around well-defined processes that control and report the accuracy of work performed.
- Comprehensive Quality Control (QC) built into Data Processing platform, ensuring client output is verified prior to entering manufacturing environment.
- Unique QC process involving dedicated personnel and procedures executed after printing and designed to ensure consistent print quality and 100% accountability for each document
- Automated 2D Barcode Accuracy System utilized, providing individual document tracking and alerting to address errors (damaged or missing documents) real-time during fulfillment.
- Dedicated Quality Assurance Team that performs Root Cause Analysis, coordinates remediation and plans continual process improvements.

## D. Describe Respondent's capability to perform printing and reprinting, folding, sorting and inserting, stocking of forms, envelopes and return envelopes, and mail preparation procedures.

### InfoSend Data Process Flow

InfoSend's Customer Communications Management (CCM) platform is designed to securely and efficiently accept, process and output client data to customers in a reliable and transparent manner. The data flow for InfoSend entails:

1. **Client Input-Data Transfer and Acknowledgement**
2. **Data Processing and Validation**
3. **Document Composition and Sample Approval**
4. **Printing**
5. **Quality Control**
6. **Mailing and Electronic Distribution**
7. **Confirmation and Reporting**

#### 1. Client Input-Data Transfer and Acknowledgement

- **Secure File Upload Options:** On a 24/7 basis, data files can be sent to InfoSend via FTP or SFTP or clients can also log in to InfoSend's secure website and upload files using the HTTPS file upload method. Optionally, and depending on client security requirements, password protected or PGP/GPG encryption can be utilized on the files. When a file is received, it is automatically time-stamped and logged in InfoSend's Job Tracking database.
- **Duplicate File Prevention:** All data transfers are checked against an archive of file-level hashes and if a match is found, the system will detect the file as a duplicate. If a duplicate is detected, the processing program is halted and a warning is generated, calling for immediate follow up by InfoSend support personnel.
- **Multi-File Inputs:** InfoSend's system can be configured to create batches based on multiple source files, as well as wait a predetermined amount of time for more client records to be transferred before beginning the batch processing.
- **Process Confirmation:** Successfully transferred files are identified by client input type, resulting in a confirmation receipt sent.

#### 2. Data Processing and Validation

- **File Integrity:** Each of InfoSend's programs is custom made to work with the clients' specific data file format. Incomplete or erroneous data will result in a program halt, issuing a warning that is escalated to InfoSend support personnel for immediate follow up.
- **Data Checks:** InfoSend programs are set up to check for individual data fields and halt if criteria are not met--for example if a date field contains a value older than an acceptable threshold. All data check halts issue a warning and escalation to InfoSend

support personnel.

### 3. Document Composition and Sample Approval

- **Job Batch Creation:** InfoSend's system will take validated input data and begin processing by assigning a unique production Job Code specific to the client input file(s). This Job Code identifies and accompanies the output through InfoSend's processing.
- **Document Layout and Business Logic:** The input data is rendered by the InfoSend application, resulting in the layout defined during the implementation. Any client defined special business logic conditions are applied at this time.
- **USPS & Special Messaging:** During processing, the system will also validate customer mailing addresses, optionally apply National Change of Address (NCOA) updates, and perform record suppression based on client-defined criteria. The system also performs USPS pre-sorting of records, applying the Intelligent Mail Barcode (IMB) and ensuring the records are in the correct order to maximize postal efficiency. Additionally, InfoSend's CCM platform will check the database for any scheduled messages or inserts to be included with the output.
- **Rendered Output and Sample Review:** Once a file has successfully been rendered, clients have the option to review a sample file containing a PDF output of the documents. Sample outputs can contain a percentage of or the complete output and includes a Process Summary report cover page which lists details on the output work to be performed by InfoSend. Clients are provided the option to either reject and resend their data file with corrections or approve the batch. Once files are approved, an email confirmation of the approval is sent, and the output is released to the manufacturing environment for distribution.

### 4. Printing

- **Job Priority:** Jobs are printed on an as-received basis, with jobs requiring the shortest turnaround time given priority. InfoSend is committed to meeting the agreed upon mail turnaround times for all clients simultaneously and is staffed and equipped accordingly.
- **Operator Controls:** Once a sample file batch has been approved for printing, files are sent to the print production queue. InfoSend's unique Central Print program monitors print jobs in the production department, prohibiting a job from being printed more than once, and provides operator controls including timestamps of printing time and other tracking metrics. InfoSend production staff with appropriate permissions are granted access to queued files.
- **Job Ticket:** A job ticket is attached during processing to each production run. A job ticket contains information such as printing specifications, form type, envelope options, and whether an insert should accompany the file. The job ticket is printed in our production department and remains with a job until it is released to the USPS for mailing.

### 5. Quality Control

- **Dedicated Workflow and Staffing:** InfoSend's emphasis on quality and customer satisfaction requires a dedicated step and operator role in the process to validate the printed output. This step in the process takes place after printing but before distribution. Each job is thoroughly checked a minimum of 4 times for general alignment, printing, color or mailing address block issues which would result in problematic processing or mailing: before printing, after printing, upon delivery to the QC department and finally upon delivery to the mailing department.
- **Uniquely Tailored QC Program:** InfoSend has an internally developed workflow that provides onscreen prompts to QC personnel, requesting they check for bill specific information (such as customer name, account number, address) on randomly selected pages throughout the batch. These onscreen prompts are customized to the client's data and ensure the integrity of data throughout the batch before releasing for distribution.

### 6. Mailing and Electronic Distribution

- **Mailing Department:** Once a job has gone through Quality Control, it is released to the printing department for fulfillment. All printed pages are matched to the correct materials per the Job Ticket and inserted into the envelope for mailing. Mail that has been inserted is then delivered to the USPS with the appropriate postal paperwork for the USPS to validate prior to induction. Upon delivery to the USPS, either at the onsite Detached Mail Unit (DMU) or local distribution center, the job batch is scanned as completed by an InfoSend operator.
- **Electronic, Multi-Channel Distribution:** Upon completion of the job batch, InfoSend's CCM platform begins the electronic distribution of customer records to the InfoSend archive, hosted eBusiness system, back to the client, or other third-party distribution networks.

## 7. Confirmation and Reporting

- **Process Confirmation:** Once InfoSend has completed the distribution of the client job batch, a confirmation receipt is sent to the client with details on the job batch execution. This receipt serves as the final notification regarding the input data received.
- **Reporting:** InfoSend's platform also provides robust reporting back to clients on the output services performed. InfoSend offers detailed address update and suppression reporting, as well as customized, detailed breakdown of the fulfillment.

## E. Please provide Respondent's quality control procedures.

### InfoSend Quality Control

InfoSend has been in business since 1996, with the founders starting the business with the assertion 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 demand 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. **Pre-production Review and Staging**
5. **Manual Fulfillment**
6. **Bulk Mail Insertion and Checks**
7. **Daily SLA Checks**

### Automated 2D Barcode Accuracy System

InfoSend leverages an automated 2D barcode system, which ensures manufacturing accuracy of client output. Key Components include:

#### 2D Barcode Scanner



## 2D Barcode System Monitor



### Printing

Each document is printed with a unique 2D barcode on the address block, and this barcode is stored in the InfoSend database.

### Scanning

A scanner checks every document as they are inserted on InfoSend inserting equipment. The envelope window is scanned and the documents are reconciled in real time with the original document print stream database, ensuring each mail pieces is accounted for.

### Reconciling

The 2D barcode monitor provides real-time alerts for any out-of-sequence, missing, duplicate, misread or invalid document discrepancies during production. If a document is missing or jammed, it will be reproduced. The machine operator must signal a supervisor every single time there is an out of sequence error and receive sign-off on the resolution. InfoSend will not mail any batches which have unresolved errors (e.g. missing mail pieces).

## F. Please provide Respondent's ability to pull a bill from production processing and the process for doing so.

### File Cancellation and Document Pull Request Procedures

InfoSend's CS department accepts requests to cancel entire batches or pull select documents from a batch as a standard function of the department. This request can be placed through InfoSend's online website support ticketing system, via email, or by calling the 800 number. The request is then documented by the CS team and communicated to the InfoSend production departments through our internal systems.

1. **File Cancellation:** These requests are typically submitted to InfoSend just after file transfer but before printing. InfoSend's CS personnel will immediately change the status of the Job to prevent any further progression through the InfoSend manufacturing environment and remove the Job batch from the queue. Clients utilizing the Sample Approval workflow will have the option to cancel their own job, which will then be removed from the queue.
2. **Pull Document Requests:** These requests are typically submitted by the Client after the file is processed and prior to mailing. Ideally, these requests would be submitted to the CS team prior to the mail piece receiving the "Quality Control" timestamp in the website's client-facing job tracking system. Once the job has been marked as completing Quality Control, it will be moved into Mail Preparation. For this reason, Pull Document Requests made after the job has passed through QC should be communicated directly via phone call to ensure that they are handled immediately to minimize the chance that the piece is processed for mailing. The document to be pulled will then be intercepted after the document is printed. Pulled documents can either be recycled or returned to the Client.

**G. Please provide a description of the type and age of equipment to be used for bill printing.**

**InfoSend Print and Mail Equipment**

InfoSend utilizes a mix of plain black, and full-color printing. The documents destined for mailing are inserted on Intelligent Inserters with Mail Piece integrity that ensures all mail pieces are undamaged and accounted for after insertion in preparation for delivery to the USPS.

**Printing Equipment:**

- Roll-fed full color (CMYK) inkjet printing is the primary production method.
- Production sheet-fed full color (CMYK) inkjet printing is also utilized
- Sheet-fed full color and monochrome laser printers for small or specialty jobs and reprints.
- Full-color capacity is over 130 million images per month via full color.
- InfoSend prints images well under capacity for business continuity, new installs, and spikes in volume.

**Inserting Equipment:**

- 4 to 6 station insert feeders and can be expanded if necessary.
- Supports various folds including “C”, “V”, “Z” and Double “V”, etc.
- Capacity to finish over 86 million pieces per month.
- Mail Piece Integrity and Document Verification systems read OMR and industry standard barcodes such as 3 of 9, 2 of 5 Interleaved, 2D.
- InfoSend finishes mail pieces well under capacity for business continuity, new installs, and spikes in volume.

**InfoSend Print and Mail Equipment Full Listing**

**Printers**

Type	Printer	QTY	Images per hour (total output if more than 1 machine)
Full Color	Canon Colorstream 6900	1	109,080
Full Color	Canon i300	1	18,000
Full Color	Ricoh Pro VC60000	1	128,820
Full Color	Ricoh Pro VC40000	2	128,820 and 153,000
Full Color	Xerox Rialto 900 MP	2	54,960
Full Color	Ricoh Pro C9100	1	6,600
Monochrome	Ricoh Pro 8320	1	8,160
Full Color	Bluecrest Accellejet	1	42,960
Full Color	Riso GD9630	7	67,200
Full Color	Riso GD9150	1	9,000
Monochrome	Kodak Digimaster HD150	3	27,000

## Inkjet Printing Technology

InfoSend operates roll-fed inkjet presses out of multiple facilities to enable true Disaster Recovery capabilities. Transactional documents can be printed using full-color production inkjet technology. Inserts can be digitally pre-printed as well as offset equivalent quality using the latest high-definition inkjet technology.

Maintenance contracts are in place with qualified vendors for all InfoSend equipment involved in the fulfillment of client documents. InfoSend carefully selects vendors and equipment to guarantee production of documents according to the Service Level Agreement (SLA) between InfoSend and its clients.

### Inserters

Insertor Type	QTY	Insertions Per Hour (total output if more than 1 machine)
Sensible Technologies/Bell & Howell Intelligent Insertor with Mail Piece Integrity	26	195,000
Pitney Bowes/BlueCrest FPS/Rival Line of Inserters	10	120,000
Pitney Bowes/BlueCrest MPS Line of Inserters	1	15,000
MB Inserters	5	74,000

### Envelope Manufacturing

Equipment Type	QTY	Envelopes Manufactured Per Hour
W+D Model 202	2	84,000
W+D Model 102	3	48,000
W+D Model 627	2	54,000

## Equipment Ages

### Printers:

- Roll fed Inkjet printers - 2 years to 6 years
- Cut sheet inkjet printers - 1 year to 4 years
- Cut sheet laser printers - 2 years to 4 years

### Inserters:

- MB Inserters – 2 to 4 years
- Bell & Howell Inserters – 6 years to 12 years
- Pitney Bowes/BlueCrest lines of Inserters – 3 years to 9 years
- Mail Piece Integrity Software – 3 years (recent conversion for upgraded capability)

## H. Data receipt problems, print or other errors shall be reported to the City immediately upon recognition of issues or errors.

InfoSend acknowledges and accepts this requirement.

### InfoSend Quality Control Highlights

- Company culture demands client satisfaction with over 99.99966% accuracy on an annual output in the tens of millions.
- Systems, personnel, and equipment are organized around well-defined processes that control and report the accuracy of work performed.
- Comprehensive Quality Control (QC) built into Data Processing platform, ensuring client output is verified prior to entering manufacturing environment.
- Unique QC process involving dedicated personnel and procedures executed after printing and designed to ensure consistent print quality and 100% accountability for each document
- Automated 2D Barcode Accuracy System utilized, providing individual document tracking and alerting to address errors (damaged or missing documents) real-time during fulfillment.
- Dedicated Quality Assurance Team that performs Root Cause Analysis, coordinates remediation and plans continual process improvements.

## I. Vendor will provide procedures for the following: ▪ after-hours support ▪ a list of company holidays ▪ contact points for customer service

### InfoSend Client Services Support

InfoSend's Client Services department provides web, phone and email support channels for clients, with dedicated support staff available to resolve client requests. Support staff is trained to monitor, analyze, escalate and respond to incoming requests, as well as provide proactive support in the event internal Quality Control procedures detect issues with client data.

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. The following describes InfoSend's standard support coverage, the services that are included as part of annual software support, a listing of call priorities and an outline of escalation procedures.

InfoSend offers emergency an after-hours support line. An after-hours answering service is available 24/7/365. The answering service contacts InfoSend employees sequentially until one receives and acknowledges the call. Requests can be answered within 4 hours. InfoSend provides escalation phone number and contacts during the implementation. After-hours support may be billable. Please note, with the extensive support hours and support channels available, the after-hours answering service being used is extremely rare. Please see typical support channels overview below:

### Support Channels and Availability

InfoSend provides the following methods to be reached to initiate a support request:

- 800 Toll-Free Telephone support: (800) 955-9330
- Email via [support@infosend.com](mailto:support@infosend.com)
- Free electronic access 24 x 7 at [www.infosend.com](http://www.infosend.com) with the following online benefits:
  - Log, track & close support requests
  - View & update support requests
  - Access published documentation

- Access available downloads
- Download reports
- View Job Tracking statistics
- Download sample files in PDF format

Standard hours of support are from 6:00 AM Pacific to 6:00 PM Pacific, Monday through Friday, excluding designated statutory holidays. Weekend assistance is available and must be scheduled in advance and in most cases is billable.

InfoSend recognizes the below holidays and will be closed should they fall on a weekday.

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

## **Inbound Support Ticketing, Escalation, and Resolution Workflow**

All issues or questions reported to support can be tracked via an online support ticket. Account Managers can provide support via telephone, email or the online support ticket tool that can be accessed by logging into [www.infosend.com](http://www.infosend.com).

1. **Contact Dedicated Account Manager:** Each web submission, call or email is handled with personal support. Clients receive support by contacting their dedicated Account Manager. If the client's dedicated contact is not available, the support request will be handled by another cross-trained Account Manager or Senior Account Manager. This representative will be your liaison through the support process, giving you a single point of contact for issue resolution.
2. **Request Logging:** Each support request can be logged using InfoSend's online Support Ticket Tool. Support Ticket requests are assigned a unique ID and can be viewed by both InfoSend Support and the client's authorized representatives. Support Ticket requests are archived and can be filtered by open and closed requests.
3. **Escalation Procedure:** InfoSend staff will internally escalate any required internal technical or operational resources to ensure that quality issues are resolved quickly and completely the first time. All necessary modifications are thoroughly tested before being applied to client applications to ensure that the final product meets quality expectations.
4. **Ticket Resolution:** Once an issue has been resolved, clients are notified of the solution and allowed to review new sets of samples to approve any changes. Extra attention is paid to the new job throughout our production, quality control and mailing process. When all parties confirm that the job is meeting quality expectations through every step in the process, we will approve and release the job for completion.
5. **Client Satisfaction:** Any concerns or questions around the support being provided may be escalated to the Client Services Director.

## **Proactive File Halt, Validation Error and Quality Control Support Procedures**

InfoSend's data processing platform is designed to validate client data and will halt if any anomalies or incomplete data is detected. In addition, InfoSend's dedicated QC process will review all printed outputs to check for issues caused by client data. When issues are detected:

1. **Alert Notification:** InfoSend's internal system will automatically place the Job on hold, open a ticket and alert the CS department via an internal alert system, identifying the client and type of output.
2. **Assessment and Follow Up:** InfoSend's CS personnel will assess and then follow up with the relevant client contacts to notify of the issue.
3. **Resolution:** CS personnel will work with the client on how to address the data, either with a new data file or with programming adjustments.

## File Cancellation and Document Pull Request Procedures

InfoSend's CS department accepts requests to cancel entire batches or pull select documents from a batch as a standard function of the department. This request can be placed through InfoSend's online website support ticketing system, via email, or by calling the 800 number. The request is then documented by the CS team and communicated to the InfoSend production departments through our internal systems.

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## J. Please address the cost for storage of PDF, the time frame the bills are kept, and how City would access the bills.

Please refer to pages 82-84 to see full details regarding cost.

**1. Delivery via Final Doc Transfer (FDT):** For clients who prefer to store and host PDFs within another software environment, InfoSend is able to deliver the PDFs via Final Doc Transfer in the following ways:

- **Secure FTP Transfer:** Upon batch completion by InfoSend, a PDF file of the batch will be sent via secure FTP to the client with a companion XML index file containing standard details of the PDF batch (account #, PDF page number, etc.).
- **Custom Secure FTP Transfer:** Upon batch completion by InfoSend, the PDF data can be delivered in a complete batch or broken down and sent as one PDF file per account or document. In addition, InfoSend can match PDF file naming conventions or provide index data in a specified format. InfoSend will work with the client to define the workflow, and fees may apply depending on complexity.

# Security

**A. The Respondent must provide necessary security to protect the City's data from unauthorized access. Please provide details about the security measures that are in place. Include procedures for ensuring that only authorized persons are admitted to the production floor.**

## InfoSend Security Procedures

- InfoSend employs industry best practices while complying with numerous regulatory requirements for protecting client data.
- Compliant and/or audited by third parties for PCI-DSS Level 1, HIPAA, SSAE18, GLBA and FACTA.
- All Facility Physical Premises Secured
- Secure Encrypted Data Transfer and Storage Practices
- Secure Segmentation Client Data
- Secure Disposal of Client Data
- Firewalls and Web Application Security
- Background Checks and Drug Tests for All New Employees
- Annual Security Policy and Awareness Training for Employees
- Formal Suspected Breach Escalation, Review and Notification Process

## Incident Response Plan

InfoSend's Incident Response Plan is a component of our Information Security Policy, which is confidential and proprietary. InfoSend will provide our detailed Incident Response Plan upon execution of a non-disclosure agreement.

InfoSend has a Computer Incident Response Team (CIRT) comprised of both management and information security employees responsible for implementation of our Incident Response Plan in response to cyber-attacks that includes the following components:

- Detection
- Confinement
- Establishment of Emergency Business Continuity Plan
- Analysis of Intrusion/Forensic Investigation
- Post Forensic Recovery from the Intrusion
- Ensure Proper Security of the System & Network
- Restore Affected Services
- Implement Mandated Reporting
- Update Security Policy to Reflect Lessons Learned

InfoSend's non-confidential Security Procedures are provided below.

## 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 18**)
- 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 Transfer and 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, Fort Worth, TX and Fort Myers, FL. 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.

## **B. Describe in detail, how security is handled for information shared between the Respondent and the City via email or online and compliance with Red Flag procedures.**

### InfoSend Security Procedures Highlights

- InfoSend employs industry best practices while complying with numerous regulatory requirements for protecting client data.
- Compliant and/or audited by third parties for PCI-DSS Level 1, HIPAA, SSAE18, GLBA and FACTA.
- All Facility Physical Premises Secured
- Secure Encrypted Data Transfer and Storage Practices
- Secure Segmentation Client Data
- Secure Disposal of Client Data
- Firewalls and Web Application Security
- Background Checks and Drug Tests for All New Employees
- Annual Security Policy and Awareness Training for Employees
- Formal Suspected Breach Escalation, Review and Notification Process

## **C. Demonstrate capability and describe procedure used in handling confidential information and documents.**

### **InfoSend Security Procedures Highlights**

- InfoSend employs industry best practices while complying with numerous regulatory requirements for protecting client data.
- Compliant and/or audited by third parties for PCI-DSS Level 1, HIPAA, SSAE18, GLBA and FACTA.
- All Facility Physical Premises Secured
- Secure Encrypted Data Transfer and Storage Practices
- Secure Segmentation Client Data
- Secure Disposal of Client Data
- Firewalls and Web Application Security
- Background Checks and Drug Tests for All New Employees
- Annual Security Policy and Awareness Training for Employees
- Formal Suspected Breach Escalation, Review and Notification Process

# Backup & Recovery

**A. The Respondent will perform system backups and ensure they provide system redundancy, fault tolerance, and disaster recovery to assure that the printing, folding, inserting, and stuffing functions can be performed regardless of equipment breakdowns or other potential disasters.**

## InfoSend Business Continuity: Risk Mitigation and Disaster Recovery

InfoSend understands the importance of business continuity. InfoSend's organization and systems are designed to ensure risk mitigation and resilient disaster response in the event of unforeseen events. InfoSend uses its multiple, geographically distinct facilities to ensure regional events do not affect InfoSend operations.

Hundreds of clients depend on our platforms and staff to provide business-critical services. Our excellent client retention track record speaks to our system reliability and high-quality processing. While InfoSend has never had to implement a disaster recovery plan in a live environment, a great importance is placed on maintaining and testing a successful disaster recovery strategy. InfoSend's knowledge of a strong disaster recovery strategy comes from testing, consultation with IT experts, and from years of research.

**B. The Respondent must have a backup and disaster recovery facility to process bills if the main facility becomes inoperable.**

## InfoSend Business Continuity: Risk Mitigation and Disaster Recovery Highlights

InfoSend approaches the risk of technology failure or operational interruption via the following methodologies:

- Operations run under capacity for Data Center, Equipment and Labor Force potential
- Specific pandemic protocols to prevent labor shortages and protect employees
- Operational and Procedural Documentation
- Redundant Communication Lines
- Server Virtualization Used
- Multiple Forms of Data Redundancy: RAID, SAN, VPN Data Sync and Off-Site Hard Drive Backup
- Automated Alerts and 24/7 Employee Coverage
- Disaster Recovery Plan and Preparedness

**C. Facilities must be geographically diverse to protect against regional events.**

## InfoSend Facilities Highlights

- InfoSend is located strategically across the nation, ensuring both disaster mitigation and regional access to the USPS.
- Corporate Headquarters, Primary Data Center & Western US Production Facility located in Anaheim, California.
- Midwest, Backup Data Center & Northeastern US Production Facility located in Downers Grove, IL, near Chicago.
- Texas & Central US Production Facility located in Fort Worth, TX, near Dallas.
- Florida & Southeastern Production Facility located in Fort Myers, FL, near Tampa.
- Massachusetts and Northeastern Production Facility located in Haverhill, MA near Boston.

## D. Please list your facilities.

### InfoSend Facilities

InfoSend is located strategically across the nation, ensuring both disaster mitigation and regional access to the USPS.

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#### **Florida: Southeast Production Facility**

**13891 Jetport Loop · Fort Myers FL 33912**

InfoSend's 13,000 sq. ft. Southeastern production facility is located South of Tampa, FL. This facility is used to process documents for clients located in Florida, the Southeast and up the Eastern Seaboard.



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#### **Illinois: Midwest & Northeastern Production Facility**

**1406 Centre Circle · Downers Grove IL 60515**

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.



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#### **Texas: Southcentral Production Facility**

**4301 Cambridge Road Suite A · Fort Worth TX 76155**

InfoSend's 46,000 sq. ft. Texas Production facility is located in the Dallas - Fort Worth Metroplex and is the main production center for clients in the South and the Central US. This facility also provides out-of-state disaster recovery for InfoSend's other locations.



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#### **California: Western US Production Facility (Corporate HQ)**

**4240 E. La Palma Ave · Anaheim CA 92807**

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 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.



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#### **Massachusetts: InfoSend Northeast Production Facility**

**41 Rogers Road · Haverhill MA 01835**

InfoSend Northeast, LLC is a certified woman owned affiliate of InfoSend, Inc. It is located in Massachusetts and services clients in the Northeastern US of both InfoSend and InfoSend Northeast. InfoSend provides disaster recovery services to InfoSend Northeast.



## E. Provide a detailed summary of the Respondent's disaster recovery plan.

### InfoSend Business Continuity: Risk Mitigation and Disaster Recovery

InfoSend understands the importance of business continuity. InfoSend's organization and systems are designed to ensure risk mitigation and resilient disaster response in the event of unforeseen events. InfoSend uses its multiple, geographically distinct facilities to ensure regional events do not affect InfoSend operations.

Hundreds of clients depend on our platforms and staff to provide business-critical services. Our excellent client retention track record speaks to our system reliability and high-quality processing. While InfoSend has never had to implement a disaster recovery plan in a live environment, a great importance is placed on maintaining and testing a successful disaster recovery strategy. InfoSend's knowledge of a strong disaster recovery strategy comes from testing, consultation with IT experts, and from years of research.

InfoSend's approaches business continuity through:

- **A. Risk Mitigation**
- **B. Disaster Recovery Plan**

#### A. Risk Mitigation

InfoSend has designed the organization and systems to mitigate various risks that could impact or completely disable national or regional operations. By building resiliency at the local level, InfoSend ensures highly available and secure operations at each facility and system-wide. Risk is mitigated through:

- **Organizational Design**
- **Data Center Design**
- **Data Backup Design**
- **Network Security**
- **Labor Management**
- **Client Material Redundancy**
- **Equipment Mirroring**
- **Facility Mirroring**

#### Organizational Design

1. **Operations Run Under Capacity:** This ensures that each local facility can endure well above normal interruptions in labor force or fulfillment equipment availability. Employees in critical roles are cross-trained to provide coverage of any specialized work.
2. **Operational and Procedural Documentation:** All systems and practices are documented both for internal training and reference, as well as to meet outside audit requirements in order to maintain compliances such as PCI-DSS Level 1 and HIPAA.
3. **Redundant Communication Lines:** InfoSend's headquarters utilize both wired and wireless lines, with seamless failover should an Internet provider have an outage.
4. **Server Virtualization Used:** InfoSend fully leverages server virtualization technology, ensuring any critical processes can be hardware agnostic and quickly cut over to other available hardware resources in the event of a failure.
5. **Multiple Forms of Data Redundancy:** RAID, SAN, VPN Data Sync and Off-Site Hard Drive Backup. InfoSend utilizes a combination of these methods to ensure real-time accuracy, redundancy and disaster-proof availability of data.
6. **Automated System Alerts and 24/7 Employee Coverage:** InfoSend ensures that all systems are automatically monitored and reported on, with failures triggering emails and text messages to employee phones. Multiple employees are cross-trained in systems engineering and administration for around the clock coverage across all facilities.
7. **Disaster Recovery Plan and Preparedness:** In the event of severe labor interruptions or physical premises becoming incapable of production due to external causes, InfoSend will utilize its Disaster Recovery site to continue operations.

## Data Center Design

- Redundant data centers; system architecture uses industry-standard security practices and a multi-layered security approach
- Redundancy for all critical servers, switches, etc. Virtualization used to provide automatic backup and restoration of live operating systems
- Highly scalable; system scales horizontally so that additional processing power can be added quickly. Load balancing for high availability
- Multiple methods of secure data transmission with firewall failover are available to ensure that client data reaches InfoSend securely, quickly, and in whole
- Each InfoSend facility has high speed Internet connections with a minimum of 10mb of bandwidth. Both the primary data center facility (corporate H.Q.) and DR data center use a fiber optic Internet connection from AT&T with a minimum of 100mb of bandwidth. The primary data center also has a backup wireless Internet connection from a different provider.
- UPS systems for battery backup and 600KW backup generator to power data center automatically in the event of grid failure
- Large secure storage array; all network storage uses RAID and SAN technology
- Backup copies of all data files are made before processing; data is backed up to external hard drives, stored in a fireproof safe, and picked up by an enterprise media vaulting service provider
- System and facility capacity and responsiveness are constantly monitored with Icinga protocol; alerts sent to internal systems administration staff when potential issues arise
- The system is scaled to prepare for upcoming volume increases.
- InfoSend's security and compliance procedures ensure infrastructure is constantly improved and evolved.

## Data Backup Design

InfoSend utilizes a secure VPN to ensure the primary data center is continually syncing data to the disaster recovery site. Server virtualization technology is also leveraged to ensure applications are hardware agnostic and can be configured and run at any of the InfoSend sites with little to no cutover time. All data is committed to encrypted media backup and routinely taken offsite to a secure location.

Four separate backup methods are in place to protect data and assure systems are fully restored after a disaster of any type:

1. All servers are duplicated at the Disaster Recovery Facility. Data is automatically synced between the main facility and the Disaster Recovery Facility over a secure VPN.
2. Server data is backed up to secure encrypted media that are both stored in fireproof safes and taken off-site routinely.
3. The RAID system is used on all servers to ensure that data remains available in the event of a hard disk failure.
4. Network SAN systems are used that expand upon RAID by duplicating the entire network storage system to a redundant node with its own RAID.

## Network Security

- HTTPS encryption on all web server connections, server authentication
- Client authentication for TCP/IP connections
- Firewalls blocking all traffic unless expressly permitted, no direct connections to the LAN
- Only authenticated users of InfoSend's intranet can access the LAN locally or remotely (via the VPN), two-factor authentication required for VPN access
- System attack attempts are monitored and directly reported to system administrators
- Limited access points due to tiered permission levels for InfoSend's CRM system, client data access points, storage drives, and networks. Each access point is guarded by separate firewalls.
- Separation of firewalls and networks in order to isolate production network. Enterprise-class firewalls are used to safeguard data, using a combination of the layer-3, layer-4, and layer-7 security technologies.

- Perimeter network security data/protection. HTTP, FTP, and SFTP networks located within networks behind secured servers
- HTTP, FTP, and SFTP set application protocols and application filtering
- Continuous monitoring of web applications by InfoSend's system administrators, with automated notifications, enable in the case of threat detection or web vulnerability
- Static and dynamic packet filtering
- Scheduled testing of InfoSend's systems
- Meets rigorous audit requirements
- Notifications from McAfee, CERN, etc.
- Data transmission through HTTPS web uploads or FTP/SFTP with PGP encryption
- VPN system hardening
- External third-party security monitoring alerts InfoSend if there is a potential security risk

### **Labor Management**

InfoSend's employees are cross-trained and can manage tasks that span the entire production process. InfoSend employs more production staff than is required to handle spikes in volume and/or employees being unavailable for any reason. At InfoSend's current size and capacity, operations can run normally with the absence of key personnel with no effect on production.

During periods of pandemic-related labor shortages and/or outbreaks, InfoSend has deployed the following strategies:

- Require face coverings in all common areas
- Distance production staff and equipment by at least 6 feet, following social distancing protocols
- Enable remote working arrangements for workers who can perform their duties remotely by providing necessary equipment and secure remote access as needed
- Facility mirroring at InfoSend's 5 nationwide locations allows InfoSend to load balance client production across facilities should a localized shut-down result in sudden impacts

### **Client Materials Redundancy**

- InfoSend's standard envelopes are stored at each facility.
- InfoSend manufactures its own envelopes as well as purchases from suppliers to ensure ample inventory.
- InfoSend's standard forms (including the blank white form with a perforation) are stored at each facility.
- All paper materials required for mail piece production are sourced from American paper mills to avoid global supply chain disruption.
- The custom pre-printed form elements (e.g. logo, statement backer) can also be printed on white paper if a client's custom forms are not available.

### **Equipment Mirroring**

- Intelligent mail inserters (with mail piece integrity) are actively in use at all facilities.
- Each facility uses multiple printing and inserting production lines, each that operate independently of the others in the case of equipment maintenance or downtime.
- InfoSend's Job Tracking application logs where each batch is produced and can redirect individual jobs to other facilities on the fly if needed.

### **Facility Mirroring**

- InfoSend owns and operates facilities in 5 different states: California, Texas, Illinois, Florida and Massachusetts (affiliate). By not relying on third party contracts for DR capacity InfoSend has true Disaster Recovery.
- Large clients can opt to have their jobs split from two facilities on a normal day to day basis. This ensures that DR capabilities are continually tested.

- All facilities utilize inkjet printing onto white paper and stock standard envelopes (see above sections).

## B. Disaster Recovery

Should one of InfoSend’s facilities operations become partially or fully disabled, then the InfoSend Disaster Recovery (DR) Plan is enacted. The DR Plan requires the following steps be followed:

1. **Detection:** The InfoSend Emergency Management Team (EMT) is notified and assembled to evaluate the degraded operations.
2. **Assessment:** An Assessment Checklist is completed to assess and assign a DR Response Level.
3. **Response/ Facility Failover Checklist:** Upon completion of the assessment, InfoSend immediately begins the DR Response Checklist according to the Disaster Level.
4. **Notification:** Notifications are provided both internally to staff and externally to clients according to the Response Level, including details on service impacts and timelines for resolution.
5. **Recovery:** InfoSend ensures the completion of the DR Checklist and measures to ensure normal operations have resumed.
6. **Facility Restoration:** Repairs begin immediately upon resumption of normal operations, and eventual service restoration to the regional facility is planned.

InfoSend Corporation Disaster Levels and Definitions				
Level	Extent of Damage?	Recovery Point Objective (RPO)	Return To Operations (RTO)	Loss of Function
Level 1	<ul style="list-style-type: none"> <li>• No critical damage to the location</li> <li>• Primary facility and all operations will become accessible in 6-hour timeframe</li> <li>• Limited damage to equipment</li> <li>• Equipment damage could include hardware, software, mechanical and/or electrical</li> <li>• Data and print operations can be continued at the site and repairs started immediately</li> </ul>	N/A	2 to 6 hours	None to Minimal
Level 2	<ul style="list-style-type: none"> <li>• Some damage to the location</li> <li>• Facility is accessible but cannot be fully occupied</li> <li>• Some of the equipment must be replaced</li> <li>• Data and print operations can resume within 4 business days</li> </ul>	N/A	6 to 96 hours	Minimal to Moderate
Level 3	<ul style="list-style-type: none"> <li>• Heavy damage to the location</li> <li>• Facility is inaccessible or</li> </ul>	6 to 12 Hours	24 hours +	Moderate to Complete

	<p>completely destroyed</p> <ul style="list-style-type: none"> <li>• Some or all equipment must be replaced</li> <li>• Data and print operations can be restored within 7 business days</li> </ul>			
--	--	--	--	--

Maximum Acceptable Outages (MPO) for critical services:

- Provide limited replacement of lost functions within 24 hours
- Recover to normal operation within 7 days

**Testing and Documentation**

InfoSend’s disaster recovery procedures are continuously improved. Documentation is regularly updated as necessitated by new requirements or changes to internal procedure or systems engineering.

InfoSend tests the DR Plan annually with executive management review and approval.

**F. The Respondents will provide routine backup and recovery procedures.**

**InfoSend Business Continuity: Risk Mitigation and Disaster Recovery Highlights**

InfoSend approaches the risk of technology failure or operational interruption via the following methodologies:

- Operations run under capacity for Data Center, Equipment and Labor Force potential
- Specific pandemic protocols to prevent labor shortages and protect employees
- Operational and Procedural Documentation
- Redundant Communication Lines
- Server Virtualization Used
- Multiple Forms of Data Redundancy: RAID, SAN, VPN Data Sync and Off-Site Hard Drive Backup
- Automated Alerts and 24/7 Employee Coverage
- Disaster Recovery Plan and Preparedness

**G. In the event of a disaster, the Respondents shall immediately notify the City and provide information about the alternate location to be used for processing utility bills and of any delay in process start up.**

InfoSend complies with this requirement. Please see Question E above for detailed information regarding our Disaster Recovery process.

# Optional Services

While the intent of this RFP is to obtain printing and mailing services for Utility Billing printing and mailing service, other services will be considered. Vendors should list optional services available and estimated costs for these services, which are listed in the Bid Sheet. The City reserves the right to utilize the selected vendor for these services at a future date, depending on budget. Services may include, but are not limited to the following:

## A. Ability to provide real-time customer support on billing inquiries;

### InfoSend Client Services Support

InfoSend's Client Services department provides web, phone and email support channels for clients, with dedicated support staff available to resolve client requests. Support staff is trained to monitor, analyze, escalate and respond to incoming requests, as well as provide proactive support in the event internal Quality Control procedures detect issues with client data.

- Dedicated Account Manager from implementation also assigned to monitor and provide support.
- Dedicated Support Staff for reviewing and responding to incoming issues.
- Multiple communication channels available for client preference: web support ticketing tool, email, and phone.
- Proactive support initiated by InfoSend staff when client data issues are detected by InfoSend Quality Control processes.
- Issues tracked via InfoSend CRM tool, ensuring full resolution before the ticket can be closed.

## B. Ability to provide customer notifications of impending disconnections;

InfoSend makes every effort to stay informed about possible risks to our production services and will, whenever possible, be proactive in determining the likelihood of a service interruption and notify clients ahead of time. An example would be monitoring a storm system that is likely to impact a production facility and moving work to another site ahead of the event.

In the event of a unexpected complete interruption of service at one of InfoSend's production facilities, clients will be notified of the outage within 6 hours of the determination that the site is unable to produce work. This allows time for InfoSend to assess the situation and to take mitigating steps before determining that production is unable to proceed at the site. Clients will typically be notified via email, and generally no client action is required to move work to other sites. InfoSend will begin moving work to the designated DR locations early in the process, to minimize any potential delays to production. If clients have any concerns about the impact of a service interruption, they may contact their Account Manager for more information.

## C. Ability to provide Inserts as follows:

**Inline Inserts - An automated process is set up to selective print the inserts immediately after each bill is printed.**

**Inline and Electronic Inserting:** Support for printing marketing materials on the fly, "inline" with customer transactional billing document, as well as show with electronic images produced by InfoSend, for just-in-time manufacturing and reduced postage costs.

**Offline Inserts – The vendor must accept inserts printed by other vendors, and provide insert printing services as well. Please provide insert specifications. The vendor must agree to receive shipments of inserts and store/warehouse all forms and envelopes used to process bills.**

Communications produced by InfoSend leverage InfoSend's Customer Communications Management (CCM) platform to ensure the message is delivered to the right customers on-time and in the desired channels. Communications can be inserted with existing client mailings performed by InfoSend, or printed "inline" with the existing document as an additional page. The communication can also be inserted "selectively", allowing clients to target specific customers.

### **InfoSend Warehousing and Inventory Management Highlights**

- Excess warehousing capacity in all locations, with 49,000 square feet of warehouse space in Anaheim alone.
- Warehouses optimally placed within facilities to ensure efficient and smooth print and mail production flow.
- Dedicated warehouse personnel on staff to manage inventory and enhance client support and notification.
- Strictly controlled intake procedure ensures all drop shipped or internally produced materials match expected quality and counts before storage.
- Inventory controls ensure that InfoSend staff manages client reorder points while monitoring inventory levels with daily, weekly and monthly counting cycles.

# BILL REVIEW & APPROVAL

**A. The City will provide, via email, a confirmation of transfer of the utility bills to the Respondents. Included in the email will be the number of utility billing statements transferred to the Respondents.**

## **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. The Process Confirmation Report can be created in one of three different formats: plain text, XML or HTML.

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.

**B. The Respondents shall provide the following information to assist in the review: Number of statements produced; Number of statements suppressed (if any)**

InfoSend acknowledges and accepts this requirement.

## **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.

# TAB #6 – Cost Proposal

Insert completed Attachment “C” – Cost Schedule.

## ATTACHMENT “C” COST SCHEDULE

### RFP 2026-025 UTILITY BILLING PROCESSING SERVICES

#### INITIAL BILL DESIGN & DEVELOPMENT

Description	Unit Bid Price
Initial bill design and programming	\$ 0.00 - Existing Client
<hr/>	
Startup costs	\$ 0.00 - Existing Client
<hr/>	
Additional Cost	\$ 0.00 - Existing Client
<hr/>	
<b>Bill processed via mail</b>	
Price per mailed statement, bills processed: To include all services and supplies excluding postage.	\$0.145 /piece
Charge for combined bills.	included /piece
Charge for bill insertion (single page printed material 8 ½” x 11”)	included /piece
Charge for bill insertion (multi page printed material or trifold brochure.) Expand on cost element if required	\$0.01 /piece
PDF (electronic services if available)	\$0.011 /piece
E-mail statement	\$0.0075 /piece
Monthly charge	\$ 25.00 ebill support
<hr/>	
Per Image Charge (PDF)	\$ PDF creation included
<hr/>	
Storage of PDF (time frame for storage & employee/customer access) EOM CD Charge	\$ 0.011 per PDF in Final Doc Transfer
<hr/>	
<b>Hourly Services</b>	
Programming per hour after initial set up hour	\$ 205.00 per

Company Name: InfoSend, Inc.  
Representative: Marty Bielecki  
Title: Territory Sales Manager  
Phone: 239.247.4419 Email: marty.b@infosend.com

## Client Volume Assumptions

### Customers Contacted or Billed Monthly

- Approximately 12,000 utility bills per month
- Approximately 9,000 certificate of use notices.

### Number of Batches Monthly

- Data is uploaded 16x per month (daily)

## InfoSend Data Processing, Print and Mail Pricing

### Document Production Summary

#### Utility Bill or Notice

Package includes: one printed page up to 4/1 ink, InfoSend outgoing #10 envelope, InfoSend #9 return envelope

**\$0.145 per document**

Finished mail pieces are delivered to the USPS on the same business day. If electronic PDF samples (proofs) are requested then the mailing will be completed on the same day of sample approval. File upload deadline for same-day mailing is 8:30AM local time at the production facility designated for your account. If samples are required then they must be approved by 9:30AM local time for the file to be mailed by the same business day.

*The below provides the components of the summary price given above. All pricing is based on "Client Volume Assumptions" listed below and excludes applicable sales tax.*

### Data Processing

Setup Fee - Express PDF Input Files	\$0.00 – Waived for existing client
Setup Fee – Data Only Input Files	\$0.00 – Waived for existing client
Document Re-Design Fee	\$205.00 per hour after Go Live
<b>Data Processing Fee (per document)</b>	<b>\$0.009</b>

### Printing and Mailing Service

<b>Bill or Notice Printing &amp; Mailing Fee per Page with up to 4/1 Ink</b>	<b>\$0.073</b>
<b>USPS Postage</b>	<b>Pass-through</b> A postage deposit will be required prior to starting service.
Print Color Options (colors per side) *	\$0.073 for 4/0 or 4/1 printing \$0.076 for 4/4 printing
Inline Insert Print Fee*	\$0.067 Black printing \$0.076 Color printing
Batch Fee (per mailing batch under 200 mail pieces)	\$5.00
Excess Pages Handwork Surcharge (per mail piece)	\$0.38
Address Updates – per "hit" (address that gets updated)	\$0.35 NCOA \$0.35 ACS

\*Prices assume normal ink/toner coverage for business documents. Flood coating the entire page in color or other types of extremely high coverage designs may cost more or not be technically feasible. Extremely high coverage designs can cause content to bleed through to the other side of the page or to cause the page to curl too much to work properly with high-speed mail inserting equipment.

### Materials

Standard 8.5" x 11" Paper Stock (per sheet)	\$0.016
Standard Double Window Outgoing #10 Envelope	\$0.025
Standard Single Window Return #9 Envelope	\$0.022
Outgoing 6 x 9.5 Envelope – may be used in cases of mail pieces with excess pages	\$0.053
Outgoing Flat Envelope (9 x 12) – used for mail pieces with excess pages	\$0.17 (19 current)

Insert Services	
InfoSend Produced	Quoted based on specification
Envelope Messaging (Snipes)	Quoted based on specification
Electronic Inserts	\$0.01
<b>Inserting Fee</b>  Fee to insert an InfoSend produced or Client provided marketing or informational insert. Client provided (drop-shipped) inserts must be professionally packaged and ready for usage. If folding is required then additional fees apply based on folding requirements. Minimum fee is \$0.01 per insert for folding. If inserts are not professionally packaged and damaged in shipment or require additional labor to prepare for inserting then additional fees can apply.  Per item fee assumes the insert will be included in all mail pieces. Selective inserting is available but requirements must be reviewed on a case by case basis to determine if additional fees will apply for setup and handling.	\$0.01 per insert

Email Ebilling Service	
<b>Per Email Fee</b> Per email sent. Includes creation of email bills and bill summaries based off of flagged accounts in the data provided by Client.	\$0.075
<b>Monthly Support Fee</b> Per month fee to support the Email eBilling Service.	\$25 – ebill support
<b>Email eBilling Service Initial Set-up Cost</b>  <b>Please note:</b> Clients must sign off on requirements documents (Statement of Work, project plan, etc.) before programming and system configuration can begin. Quoted implementation timeline begins upon approval of the SOW. Client can be charged additional fees and/or have the project go-live date delayed if requirements are changed after they have been finalized and signed off.	\$395 - one time set up fee

Optional Document Services	
Print Image Archiving (Per Document Image), with included USPS mail tracking	\$0.01 - For 12 Months of Retention \$0.022 - For 24 Months of Retention \$0.027 - For 36 Months of Retention
Print Image Archive API Monthly Support Fee	\$100.00
Final Doc Transfer (FDT)	Option 1: \$0.011 per document. One PDF will be provided per batch with multiple documents in it. InfoSend standard batch file format provides account and page numbers for each record in the batch.  Option 2: \$0.015 per document. Each document will be provided in a separate PDF file. A custom batch file format can be provided if the InfoSend standard format will not work.
Professional Services Rate (per hour)	\$205.00
Returned Mail Handling	\$0.35 per reported returned mail piece
Remit Tracking	\$50 monthly support fee
Data Infrastructure Surcharge	\$50.00 monthly fee

## Fee Explanations

### Data Processing

- **Setup Fee - Express PDF Input:** requires a final composed PDF is uploaded to InfoSend for processing. Clients maintain control of document look and feel, but InfoSend designs a program to parse the necessary data from the PDF.
- **Setup Fee - Data Only Input:** requires the client provide a flat data extract, InfoSend creates, hosts and maintains an application to generate documents. Existing document design is copied.
- **Document Re-Design Fee:** using the "Data Only Input" method, InfoSend's Client Services Team assists in redesigning the format of printed documents to improve communications or to take advantage of new printing capabilities.
- **Data Processing Fee:** per document image that is processed by the InfoSend system for output.

### Printing and Mailing Service

- **Print Fee:** price includes baseline number of colors printed on the front and back of the document. All variable and static images are dynamically imaged onto white form with a perforation.
- **Postage:** clients are invoiced for the exact postage used. Leveraging InfoSend's USPS compliance and expertise, clients are provided the lowest possible USPS automated rates when client batches qualify.
- **Optional Color Upgrades:** Different options are available at different prices. Numbers fewer than 4 equal individual colors, 4 equals full color. The number 1 means black or grey. All sheets are billed at the same rate; the price for the sheet with the highest number of colors is the applicable fee. **4 equals CMYK (full color).**
- **Batch Fee:** assessed to cover InfoSend costs when batches transferred to InfoSend fall below threshold.
- **Inline Insert Print Fee:** price for inserts printed on demand as additional pages. Allows for more dynamic customer messaging without the extra pre-production lead time and overhead.
- **Excess Pages Handwork Surcharge:** surcharge is assessed per mail piece (not per page). This surcharge only applies to multiple page bills that have too many pages to be inserted into a #10 envelope by machine. This surcharge covers the necessary manual labor required to process these mail pieces.
- **Address Updates – NCOALink or ACS:** per reported update. InfoSend electronically reports the addresses it received in your data that need to be updated because the customer filed a Change of Address Report with the USPS. Cost is per update.

### Materials

- **Paper Stock:** white paper stock with or without perforation. Paper is 8.5x11" and 24lb. Price includes all inventory costs. A larger 8.5x14" format is available at a higher material cost and higher printing cost.
- **Outgoing #10 Envelope:** #10 InfoSend Standard Double Window Outgoing Envelope. Includes security tint printed on the inside of the paper stock and clear film that prevent the contents of the envelope from being viewed. Sourced with sustainably logged paper (SFI).
- **Return #9 Envelope:** #9 InfoSend Standard Single Window Return Envelope. Includes the same security tint and SFI paper as the #10.
- **Outgoing Flat Envelope:** single window envelope, only used for multiple page statements that do not fit in the #10 envelope.

### Insert Services

- **InfoSend Produced Inserts:** utilizing InfoSend printing and/or design services, inserts can be produced by InfoSend. Price quoted on request.
- **Envelope Messaging (Snipes):** custom messages and images can be printed onto the standard InfoSend #10 double window envelope as a more cost-effective alternative to pre-manufactured custom envelopes. The price depends on the artwork – number of colors and whether it prints on one or both sides of the envelope, as well as order quantity. Price is quoted upon request.
- **Electronic Inserts:** fee per digital image of a physically produced insert included in the PDF copy of a document. Ensures that client representatives and client customers can get the same information in the electronic bill as would go out physically.
- **Inserting Fee:** client provided or InfoSend produced inserts to be included with InfoSend produced mail. Additional fee applies if insert arrives at InfoSend but requires folding prior to insertion. Setup fees may apply for programming selective inserting. InfoSend-printed inserts are quoted upon request.

### Optional Document Services

- **Enhanced Print Quality:** the baseline print image quality for transactional documents such as statements and invoices is 600 x 600 DPI. Work produced from InfoSend's Anaheim facility can be printed at an enhanced image quality at an additional cost. This option uses high definition pigment ink & variable drop sizes to achieve a perceived 1200 x 1200 DPI image quality.
- **Print Image Archiving:** fee per document to process, index, and store a document as a PDF for a set number of months. PDFs are securely accessed using an InfoSend website application, and includes USPS mail tracking for all outbound First Class mailed documents. Setup fees may apply depending on configuration needs.
- **Print Image Archive API Monthly Support Fee:** a flat monthly support fee to provide API access to documents in the InfoSend Print Image Archive. InfoSend will work with the designated third parties that a Client chooses, and provide support and open access to API calls on a monthly basis.
- **Final Doc Transfer FTP:** each completed InfoSend batch is indexed and transferred to you via FTP or SFTP to store on your own network. InfoSend's standard Batch File format is one PDF per batch with an XML companion file providing meta data and page numbers. If the client requires a custom scheme, including individual PDFs per each image in a batch, the Custom fee applies. Note: setup fees may also apply for some custom setups.
- **Professional Services Fee:** per hour and performed only upon request for customizations made to processing program or document format after go-live. Work is only started after receiving client approval of a formal quote.
- **Returned Mail Handling:** InfoSend will provide electronic reporting of mail that is returned by USPS, saving clients the hassle of receiving and opening returned mail to update records. All records which are not delivered will be securely destroyed and recycled after reporting.
- **Remit Tracking:** for clients utilizing the Print Image Archiving service, InfoSend can also track inbound mail from customers utilizing an included remittance stub in the outbound mail. With Remit Tracking clients will be able to see when a customer responded to the original mail piece, as well as get a daily report of inbound mail with an estimated value of payment remittances based on the outbound mail.

# TAB #7 – Personnel & Management

Provide resumes of key personnel. Include an organizational chart showing staffing and reporting structure.

Please see Tab #3 for InfoSend’s Organizational Chart.

<b>Name</b>	<b>Bob Woods</b>
<b>Experience</b>	<p><b>InfoSend, Inc</b> Carrollton, TX (2014-present) Senior Account Manager</p> <ul style="list-style-type: none"> <li>• Manage new client implementation projects in a variety of verticals</li> <li>• Provide ongoing personal support to clients</li> <li>• Coordinate between clients and internal departments to ensure compliance with best practices and procedures</li> </ul> <p><b>DataProse, Inc</b> Coppell, TX (2011-2014) Strategic Account Manager</p> <ul style="list-style-type: none"> <li>• Responsible to build relationships and maintain Clientele</li> <li>• Manage internal and external client relationships</li> <li>• Ensure prompt issue resolution, client education and communications.</li> <li>• Responsible for knowing client’s business as well as the client’s objectives and challenges.</li> </ul> <p><b>CSG Systems, Inc.</b> Coppell, TX (2010-2011) Senior Account Manager</p> <ul style="list-style-type: none"> <li>• Serves as main contact between CSG and client base of 90</li> <li>• Works closely with other departments to ensure quality of product, timeliness of delivery and client satisfaction</li> <li>• Plans and manages project timelines, budgets and priorities</li> <li>•</li> </ul>
<b>Education</b>	<p><b>Bachelor of Science in Computer Engineering</b> California State Polytechnic University, Pomona</p>

<b>Name</b>	<b>Alicia Tsang</b>
<b>Experience</b>	<p><b>Developer, IT</b> InfoSend, Inc.   2018 – Present</p> <ul style="list-style-type: none"> <li>• Implemented systems for automated client data processing and established business logic for client mailing output</li> <li>• Performed maintenance on programs involving data submission, and mailing logic to ensure streamlined workflow</li> <li>• Produced quality programs to client specifications in fast-paced scrum environment</li> <li>• Developed over 125+ new implementations and software conversions</li> <li>• Experience in multiple programming languages</li> <li>• Experience in parsing various data formats</li> </ul>
<b>Education</b>	<p><b>Bachelor of Science in Computer Engineering</b> California State Polytechnic University, Pomona</p>

<b>Name</b>	<b>Audra Maxwell</b>
<b>Experience</b>	<p><b>InfoSend, Inc</b> Fort Myers, FL (2019-present) Account Manager</p> <ul style="list-style-type: none"> <li>• Manage software conversions and new client implementation projects in a variety of verticals</li> <li>• Provide ongoing personal support to clients</li> <li>• Coordinate between clients and internal departments to ensure compliance with best practices and procedures</li> </ul> <p><b>Southwest Direct</b> Fort Myers, FL (2016-2019) Project Manager</p> <ul style="list-style-type: none"> <li>• Provide front line support for data processing and change requests to clients in a wide range of industries</li> <li>• Work with clients to identify issues and/or change requests and coordinate with internal and external stakeholders on resolution.</li> <li>• Manage custom materials orders and changes requests</li> <li>• Work on one-time mailing projects utilizing internal resources to meet short turnaround schedules.</li> <li>• Manage software conversions and new client implementation projects in a variety of verticals</li> <li>• Provide ongoing personal support to clients</li> </ul> <p>Run reports and audits for billing, as well as provide support for client questions or concerns related to invoices.</p>

<b>Name</b>	<b>Jeffrey Chiu</b>
<b>Experience</b>	<p><b>DPPM Programmer, IT</b> InfoSend, Inc.   2018 – Present</p> <ul style="list-style-type: none"> <li>• Developed over 150+ applications for new client onboards and or software conversions</li> <li>• Implemented application systems for automated client data in a variety of verticals establishing programming logic and or business rules for client mailing output.</li> <li>• Performed maintenance on programs involving data submission, electronic payments, and mailing logic to ensure streamlined workflow</li> <li>• Produced quality programs to client specifications in fast-paced scrum environment with best practices and procedures.</li> </ul>
<b>Education</b>	<p><b>Bachelor of Science, Computer Engineering</b> California State Polytechnic University, Pomona   2012– 2016</p>























































## **TAB #9 – Required Attachments**

Insert the following completed forms and documentation: • Attachment “A” – Proposer’s Qualifications Statement • Attachment “B” – Non-Collusive Affidavit • Attachment “C” – Cost Schedule • Attachment “D” – Drug-Free Workplace Certification • Attachment “E” – Signature Page / Certification • Attachment “F” – List of Subcontractors • Attachment “G” – References / Verification Form • Attachment “H” – Acknowledgement of Addenda • Attachment “I” – Anti-Human Trafficking Affidavit • Certificate of Insurance • Applicable Licenses

## **Attachment “A” – Proposer’s Qualifications Statement**

**Please see Tab #1 - Proposer’s Qualification Statement**

**ATTACHMENT "B"**  
**NON-COLLUSIVE AFFIDAVIT**

STATE OF California

COUNTY OF Orange

Russ Perez being first duly sworn deposes and says that:

BIDDER \_\_\_\_\_ is \_\_\_\_\_ the

\_\_\_\_\_,  
(Owner, Partner, Officer, Representative, or Agent)


BIDDER is fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such Bid;

Such Bid is genuine and is not a collusive or sham Bid;

Neither the said BIDDER nor any of its officers, partners, owners, agents, representative, employees or parties in interest, including this affidavit, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other BIDDER, firm or person to submit a collusive or sham Bid in connection with the Contract for which the attached Bid has been submitted; or to refrain from bidding in connection with such Contract; or have in any manner, directly or indirectly, sought by agreement or collusion, or communications, or conference with any BIDDER, firm, or person to fix the price or prices in the attached Bid or any other BIDDER, or to fix any overhead, profit, or cost element of the Bid Price or the Bid Price of any other BIDDER, or to secure through any collusion conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Contract;

The price of items quoted in the attached Bid are fair and proper and are not tainted by collusion, conspiracy, connivance, or unlawful agreement on the part of the BIDDER or any other of its agents, representatives, owners, employees or parties in interest, including this affidavit.

By



Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_,  
20\_\_\_\_\_.

*(A large diagonal blue line is drawn across the signature and date fields.)*

\_\_\_\_\_  
Notary Public  
(Signature)

My Commission Expires:

\_\_\_\_\_

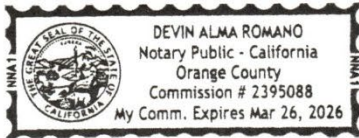
*See attached*

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California  
County of Orange

Subscribed and sworn to (or affirmed) before me on this 19th  
day of February, 2026, by Rusteen Rezai

proved to me on the basis of satisfactory evidence to be the  
person(s) who appeared before me.



(Seal)

Signature Devin Alma Romano

## Attachment “C” – Cost Schedule

Please see Tab #6 – Cost Proposal

**ATTACHMENT "D"**  
**CONFIRMATION OF DRUG-FREE WORKPLACE**

In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibitions.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or Contractual services that are under Bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employee that, as a condition of working on the commodities or Contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any State, for a violation occurring in the workplace no later than five (5) days after the conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

A signed copy of your Drug-Free Workplace Policy must be attached to this signed copy and submitted with the Bid Documents.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

  
\_\_\_\_\_  
Vendor's Signature

**ATTACHMENT "E"**  
**CERTIFIED RESOLUTION**

I, Roxana Weil, the duly elected  
Secretary  
(person's name)

of Infosend, Inc. Secretary Infosend, a corporation  
organized and (Business Name)

existing under the laws of the State of  
California

do hereby certify that the following Resolution was unanimously adopted and passed by a quorum of the Board of Directors of the said corporation at a meeting held in accordance with law and the by-laws of the said corporation.

"IT IS HEREBY RESOLVED THAT  
Russ Rezaei"  
(Person's name)




The duly elected President of Infosend, Inc.  
(Title of Officer) (Business Name)

is hereby authorized to execute and submit a Bid and Bid Bond, if such bond is required, to the City of Lauderhill and such other instruments in writing as may be necessary of behalf of the said corporation; and that the Bid, Bid Bond, and other such instruments signed by him/her shall be binding upon the said corporation as its own acts and deeds. The secretary shall certify the names and signatures of those authorized to act by the foregoing resolution.

The City of Lauderhill shall be duly protected in relying upon such certification of the secretary and shall be indemnified and saved harmless from any and all claims, demands, expenses, loss or damage resulting from or growing out of honoring, the signature of any person so certified or for refusing to honor any signature not so certified.

I further certify that the above resolution is in force and effect and has not been revised revoked or rescinded.

I further certify that the following are the name, titles, and official signatures of those persons authorized to act by the foregoing resolution:

NAME	TITLE	SIGNATURE
<u>RUSS REZAI</u>	<u>President</u>	
<u>MAHMOOD REZAI</u>	<u>CEO</u>	
<u>Roxana Weil</u>	<u>EVP &amp; Secretary</u>	
_____	_____	_____

Given under my hand and the Seal of the said corporation

this 26<sup>th</sup> day of February, 2026.

By:   
 Secretary

(SEAL)



Executive Vice President  
 Corporate Title

**NOTE:**

The above is a suggested form of the type of Corporate Resolution desired. Such form need not be followed explicitly, but the Certified Resolution submitted must clearly show to the satisfaction of the City of Lauderhill that the person signing the Bid and Bid Bond for the corporation has been properly empowered by the corporation to do so, on its behalf.



**ATTACHMENT G**

**REFERENCES**

Please list a minimum of five (5) government agencies, with whom you have done business during the last five years, as well as the types of advertising service provided. (Please use additional sheets if you wish to provide additional references).

---

<b>Agency/Firm Name</b>	<b>Contact Name</b>	<b>Address, City, St., Zip</b>	<b>Phone/Fax Email</b>	<b>Services Provided</b>
City of Pembroke Pines	Melinda Maugeri	601 City Center Way 3rd Floor Pembroke Pines, FL 33025	Phone: 954-518-9000 Fax: 954-517-8402 Email:mmaugeri@ppines.com	Data Processing Print and Mail
City of Tamarac, FL	Christine Cajuste	6001 Nob Hill Road Tamarac, FL 33321	Phone: (954)-597-3553 Fax: 954-597-3500 Email: christine.cajuste@tamarac.org	Data Processing Print and Mail
City of Clearwater, FL	Nemanja Kuzmanovic	100 S Myrtle Avenue Clearwater, FL 33758	Phone: 727-444-8651 Fax: (727) 562-4000 Email: Nemanja.Kuzmanovic@myclearwater.com	Data Processing Print and Mail, Print Image Archiving, Mail Tracking
City of Cape Coral, FL	Bill Boyd	1015 Cultural Park Boulevard Cape Coral, FL 33990	Phone: 239-574-7722 x4010 Email: bboyd@capecoral.net	Data Processing Print and Mail
City of Fort Myers, FL	Fabian Bustos	2200 Second Street Fort Myers, FL 33901	Phone: (239) 321-8105 Email: fbustos@cityftmyers.com	Data Processing Print and Mail
City of Lauderhill, FL	Douglas W. Downs	5581 W. Oakland Park Blvd. Lauderhill, FL 33313	Phone: (954)-730-3021 Email: ddowns@lauderhill-fl.gov	Data Processing Print and Mail

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*Please ensure all requested information is filled out for each reference, providing a complete and accurate listing of your past clients.*

Attachment "H" – Acknowledgement of Addenda

**Attachment H  
Acknowledgement of Addendums**

**RFP NO.: #2026-025**  
**TITLE: UTILITY BILLING PROCESSING SERVICES**

Acknowledgement is hereby made of the following Addenda received since issuance of Specifications:

Addendum No. <sup>1</sup> \_\_\_\_\_ Dated 2/26/26

Addendum No. \_\_\_\_\_ Dated: \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated: \_\_\_\_\_

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Name of Vendor's Service Contact:  
RFP NO.: #2026-025 - UTILITY BILLING PROCESSING SERVICES

Address:  
4240 E. La Palma Ave. Anaheim, CA 92807

Signature  \_\_\_\_\_  
Date 02/19/2026

**This page must be submitted with RFP. Failure to provide the requested documents may result in your proposal being deemed Non-Responsive.**

**ATTACHMENT I**

**Affidavit of Compliance with Anti-Human Trafficking Laws**

Pursuant to Section 787.06(13) of the Florida Statutes, the undersigned, on behalf of Entity, hereby affirms under penalty of perjury the following:

1. Entity does not engage in the use of coercion for labor or services as defined in Section 787.06, Florida Statutes, relating to "Human Trafficking."
2. The undersigned is duly authorized to execute this affidavit on behalf of the Entity, and affirms that the statements made herein are true and correct under penalty of perjury.

Dated this 19<sup>th</sup> day of February, 2024

Signed: \_\_\_\_\_  
Name: Russ Rozai  
Title: President  
Entity: InfoSend, Inc.

Certificate of Insurance



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
2/12/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Marsh & McLennan Agency LLC Marsh & McLennan Ins. Agency LLC 1 Polaris Way #300 Aliso Viejo CA 92656  License#: 0H18131 INFOSENDI	CONTACT NAME: Emilia Alvarez PHONE (A/C, No, Ext): E-MAIL ADDRESS: OCCerts@MarshMMA.com FAX (A/C, No):
	INSURER(S) AFFORDING COVERAGE INSURER A : StarNet Insurance Company INSURER B : American Casualty Company of Reading PA INSURER C : The Continental Insurance Company INSURER D : Underwriters at Lloyd's London INSURER E : Arch Insurance Company INSURER F :
INSURED InfoSend, Inc. 4240 E. La Palma Avenue Anaheim CA 92807-CA	NAIC # 40045 20427 35289 55555 11150

COVERAGES CERTIFICATE NUMBER: 1959546717 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSP	SUBR WVVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	N	N	TCP20531712	2/1/2026	2/1/2027	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPIOP AGG \$ 2,000,000 \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY	N	N	TCP20531712	2/1/2026	2/1/2027	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0	N	N	TCP20531712	2/1/2026	2/1/2027	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
B C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N	N/A	7064059628 7064059631	2/1/2026 2/1/2026	2/1/2027 2/1/2027	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D D E	Prof Liab / Cyber Retro 12/01/06 Crime	N N	N N	AMWIN10207 AMWIN10207 PCD100556503	2/1/2026 2/1/2026 2/1/2026	2/1/2027 2/1/2027 2/1/2027	Agg. / Claim Retention Limit / Retention \$5,000,000 \$100,000 \$500,000 / \$10,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 RE: Evidence of Coverage.

CERTIFICATE HOLDER  Evidence of Coverage	CANCELLATION  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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ACORD 25 (2016/03)

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# *State of Florida*

## *Department of State*

I certify from the records of this office that INFOSEND, INC. is a California corporation authorized to transact business in the State of Florida, qualified on August 21, 2014.

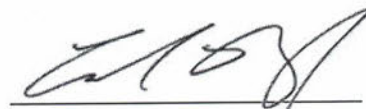
The document number of this corporation is F14000003553.

I further certify that said corporation has paid all fees due this office through December 31, 2025, that its most recent annual report/uniform business report was filed on April 1, 2025, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the First day of April, 2025*



  
*Secretary of State*

Tracking Number: 2254660966CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>



# BUSINESS TAX CERTIFICATE

POST CERTIFICATE IN A CONSPICUOUS PLACE

This certificate is not transferable or assignable. This certificate evidences that the person(s), firm or entity named herein paid the applicable tax required by Title 3 of the Anaheim Municipal Code for the period indicated and is not a regulatory permit or entitlement to do business. There may be additional requirements before the business may be legally conducted. This certificate does not authorize the conduct or continuance of any illegal or unlawful operation in violation of any law or ordinance.

Business: **INFOSEND INC**  
Address: **4240 E LA PALMA AVE**  
Owner / Officer: **MAHMOOD REZAI, OFFICER**  
Corporation / Partnership: **INFOSEND INC**

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Classification **3122**

This certificate is issued without verification that the holder is subject to or exempted from licensing by the state, county, federal government, or any other governmental agency.

Expiration Date **10/01/22**

Business License Number **BUS2011-00180**

Date issued **01/25/21**

Type of Business **BILL PRINTING, MAILING AND E-BILLING COMPANY SERVICES**

To: **INFOSEND INC**  
**4240 E LA PALMA AVE**  
**ANAHEIM, CA 92807 0000**

Under federal and state law, compliance with disability access laws is a serious and significant responsibility that applies to all California building owners and tenants with buildings open to the public. You may obtain information about your legal obligations and how to comply with disability access laws at the following agencies:  
The Division of the State Architect at [www.dgs.ca.gov/dsa/Home.aspx](http://www.dgs.ca.gov/dsa/Home.aspx).  
The Department of Rehabilitation at [www.rehab.cahwnet.gov](http://www.rehab.cahwnet.gov).  
The California Commission on Disability Access at [www.cdda.ca.gov](http://www.cdda.ca.gov).

# Items for Negotiation and Contract Discussion

If selected, InfoSend, Inc. respectfully requests the opportunity to include a force majeure clause and to revise the indemnification clause in a manner that is mutually agreeable to both parties.