

# BLANKET PURCHASE ORDER

## STATE OF MARYLAND

\*\*\*\*\* STATE OF MARYLAND \*\*\*\*\*

**BPO NO:** 001B0600400

**PRINT DATE:** 05/06/20

**PAGE:** 01

### SHIP TO:

AS SPECIFIED ON INDIVIDUAL ORDERS

### VENDOR ID:

LEAGUE FOR PEOPLE WITH DISABILITIES  
8808 ORCHARD TREE LANE

TOWSON, MD 21286  
(443 ) 279-6900

### REFER QUESTIONS TO:

MILTON FERGUSON  
(410 ) 767-4612  
ALEX.FERGUSON@MARYLAND.GOV

**ITB:** F10R0600006

**EXPR DATE:** 05/01/23  
**POST DATE:** 04/29/20

**DISCOUNT TERMS:** . NET 30 DAY  
**CONTRACT AMOUNT:** 1,635,056.80

### TERMS:

ARTICLES HEREIN ARE EXEMPT FROM MARYLAND SALES AND USE TAXES BY EXEMPTION CERTIFICATE NUMBER 3000256-3 AND FROM FEDERAL EXCISE TAXES BY EXEMPTION NUMBER 52-73-0358K. IT IS THE VENDOR'S RESPONSIBILITY TO ADVISE COMMON CARRIERS THAT AGENCIES OF THE STATE OF MARYLAND ARE EXEMPT FROM TRANSPORTATION TAX.

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WEEKLY DEBTOR NOTIFICATIONS AND YEARLY TAX INTERCEPT NOTIFICATIONS  
PRINTINGS AND MAILINGS

FOR

DEPARTMENT OF BUDGET AND MANAGEMENT CENTRAL COLLECTION UNIT

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THIS IS AN AGENCY CONTRACT FOR THREE (3) YEARS WITH TWO (2) ONE (1)  
YEAR RENEWAL OPTIONS. TERM OF CONTRACT MAY 1, 2020 THROUGH APRIL  
30, 2023. THIS CONTRACT WAS AWARDED AS A RESULT OF THE PREFERRED  
PROVIDER PROGRAM.

VENDOR NAME: THE LEAGUE FOR PEOPLE WITH DISABILITIES, INC

VENDOR CONTACT: JIM PAPPAS

VENDOR NUMBER: 410-323-0500 EXT. 403

VENDOR EMAIL: JPAPPAS@LEAGUEFORPEOPLE.COM

AGENCY CONTACT: LINDSEY EINSCHUTZ

AGENCY NUMBER: 410-767-4821

AGENCY EMAIL: LINDSEY.EINSCHUTZ@MARYLAND.GOV

### PURPOSE AND BACKGROUND:

THE CCU IS ISSUING THIS SOLICITATION FOR THE PURPOSE OF PROCURING  
SERVICES FOR THE TAX REFUND INTERCEPT PROGRAM (TRIP) MAILINGS AND THE  
WEEKLY MAILINGS OF THE DEBTOR NOTIFICATIONS.

IN THE MOST RECENT YEAR, APPROXIMATELY 1,047,029 TRIP RECORDS WERE  
MAILED TO INDIVIDUALS AND BUSINESSES. WE ARE ANTICIPATING THAT WE

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### TERMS (cont'd):

WILL SUBMIT 900,000 TO 1,300,000 RECORDS IN THE COMING YEAR.

THE TRIP RECORDS ARE SUBMITTED WEEKLY (APPROXIMATELY 12 WEEKS) BEGINNING IN SEPTEMBER AND CONTINUES EACH WEEK THROUGH NOVEMBER. EACH WEEK APPROXIMATELY 115,000-150,000 RECORDS WILL BE SENT. CONTRACT SHOULD BE IN PLACE AS SOON AS POSSIBLE AFTER BID DUE DATE TO ALLOW TIME FOR A POTENTIAL TRANSITION OF VENDORS.

IT IS IMPORTANT TO NOTE THAT THE FINAL TRIP MAILING DURING THE LAST WEEK OF NOVEMBER MUST BE POSTMARKED AND MAILED BY DECEMBER 1ST.

WITHIN THE CURRENT CALENDAR YEAR, APPROXIMATELY 6 MONTHS, 326,500 WEEKLY DEBTOR NOTIFICATIONS WERE MAILED TO INDIVIDUALS AND BUSINESSES. THERE WILL BE AN INCREASE OF THIS NUMBER DUE TO THE RE-SUBMISSION OF E-Z PASS ACCOUNTS TO THE CCU. THE ESTIMATE IS 600,000-800,000 ACCOUNTS. THIS WILL BEGIN IN OR ABOUT NOVEMBER 2020.

THE VENDOR MUST ENSURE THAT THE MAILINGS HAVE A MARYLAND POSTMARK, NOT AN OUT-OF-STATE POSTMARK.

PLEASE NOTE THAT THE CCU MAY SOMETIMES REQUEST ADDITIONAL MAILINGS OF LETTERS OR INSERTS THAT ARE NOT APART OF THE MAILINGS STANDARD TRIP NOTICES. WE WOULD PROVIDE ADVANCED NOTIFICATION TO ALLOW FOR PREPARATION AND ACCOMMODATION OF THE REQUEST. ESTIMATED COUNTS SHOULD BE WITHIN OUR STANDARD TRIP AND WEEKLY DEBTOR NOTIFICATION AMOUNTS.

#### GENERAL REQUIREMENTS:

THE CONTRACTOR SHALL DEMONSTRATE ITS ABILITY TO MEET THE FOLLOWING REQUIREMENTS FOR THE PLANNING, PREPARATION AND MAILING OF THE TAX REFUND INTERCEPT PROGRAM AND WEEKLY DEBTOR NOTIFICATIONS. THE CONTRACTOR MUST HAVE AT LEAST THREE REFERENCES OF CLIENTS FOR MAILINGS OF A SIMILAR SIZE AND DURATION.

THE BASIC FUNCTIONS OF THE TAX REFUND INTERCEPT PROGRAM AND WEEKLY DEBTOR NOTIFICATIONS MAILING SERVICES SHALL INCLUDE: ALL LETTERS ARE TO BE FOLDED, INSERTED, CASS CERTIFIED (VERIFY STREET ADDRESS EXISTS, REQUIRED BY THE STATE), MAILED (PRESORT) FIRST CLASS, ETC. INTO #10 DOUBLE WINDOW ENVELOPES.

ENVELOPES AND PAPER MUST BE SUPPLIED BY THE SUCCESSFUL BIDDER AND APPROVED BY THE CENTRAL COLLECTION UNIT. THE VENDER MUST ALSO ALLOW FOR ERROR RESOLUTION AS FAR AS PAPER STOCK, ENVELOPE STOCK, AND PRODUCTION TIME. THE VENDOR MUST HAVE THE ABILITY ACQUIRE ANY ADDITIONAL SUPPLIES FOR MAILINGS WITHIN A TWO-WEEK PERIOD.

TAX INTERCEPT MAILING PROGRAM-FILES WILL BE SUPPLIED TO THE VENDOR BY SEPTEMBER. FILES SUBMITTED WILL BE EITHER CCU ACCOUNTS OR ANY OF THE

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### **TERMS (cont'd):**

FOLLOWING THREE OUTSIDE AGENCIES, MARYLAND AUTOMOBILE INSURANCE FUND, MARYLAND DEPARTMENT OF LABOR AND OFFICE OF THE PUBLIC DEFENDER (ESTIMATES LISTED BELOW).

A PDF SAMPLE FROM THE VENDOR TO THE CENTRAL COLLECTION UNIT WILL BE SUBMITTED VIA EMAIL AND SHOULD CONTAIN A MINIMUM OF 20 SAMPLE PROOFS OF EACH LETTER TO AUTHENTICATE THE ACCURACY OF THE DATA MERGED FROM THE FILE TO THE LETTER PRINTS. THE CENTRAL COLLECTION UNIT WILL THEN RENDER APPROVAL FOR THE PRINTING AND MAILINGS TO OCCUR.

DEBTOR WEEKLY NOTIFICATION MAILINGS- FILES WILL BE SUPPLIED TO THE VENDOR AT THE END OF EACH WEEK WITH SAMPLES TO BE RETURNED TO CCU BY TUESDAY OF THE FOLLOWING WEEK.EACH FILE SUBMITTED WILL HAVE ACCOUNTS TYPES FROM EITHER CENTRAL COLLECTION UNIT, E-ZPASS MARYLAND OR THE MOTOR VEHICLE ADMINISTRATION.A PDF SAMPLE FROM THE VENDOR TO THE CENTRAL COLLECTION UNIT WILL BE SUBMITTED VIA EMAIL AND SHOULD CONTAIN A MINIMUM OF 20 SAMPLE PROOFS OF EACH NOTIFICATION LETTER TO AUTHENTICATE THE ACCURACY OF THE DATA MERGED FROM THE FILE TO THE LETTER PRINTS. THE CENTRAL COLLECTION UNIT WILL THEN RENDER APPROVAL FOR THE PRINTING AND MAILINGS TO OCCUR.

UNDER NO CIRCUMSTANCES CAN AN APPROVED PROOF BE ALTERED AFTER CCU'S APPROVAL UNLESS A NEW PROOF IS SUBMITTED. THE CENTRAL COLLECTION UNIT RESERVES THE RIGHT, WITHOUT CHARGE, TO CHANGE INFORMATION ON THE LETTERS AFTER RECEIVING PROOFS OF PRINTED LETTERS.

TAX INTERCEPT MAILINGS-ALL PRINTING AND MAILINGS MUST BE COMPLETED BY NOVEMBER 30TH YEARLY.THE MAILINGS ARE TO BE STAGGERED. VENDOR MUST PROVIDE A BUSINESS AND TECHNICAL CONTACT AVAILABLE BETWEEN THE HOURS OF 8:00AM-5:00PM. ALL MAILINGS ARE TIME SENSITIVE AND MUST BE VIEWED AND TREATED AS PRIORITY.THE VENDOR IS REQUIRED TO PROVIDE CCU WITH CONFIRMATION DATES OF ALL LETTERS DROPPED.A COVER DOCUMENT SHOWING A SUMMARY OF MAILING DETAIL SHOULD BE SUBMITTED VIA EMAIL FOR CCU TO RECONCILE THE AMOUNTS SUBMITTED AND RETURNED.

TAX INTERCEPT MAILINGS-THE CCU WILL FURNISH AN ELECTRONIC LIST OF APPROXIMATELY 700 CREDITOR NAMES AND/OR LEGACY CLIENT NUMBERS. THERE IS SPECIFIC DATA THAT WILL BE MERGED FROM DATA THAT CCU WILL PROVIDE. VENDOR MUST HAVE THE ABILITY TO READ THE PREDEFINED RECORD LAYOUT AND SPECS.

DEBTOR NOTIFICATION MAILING- THE CCU WILL FURNISH AN ELECTRONIC LIST OF APPROXIMATELY 700 CREDITOR NAMES AND/OR LEGACY CLIENT NUMBERS. THERE IS SPECIFIC DATA THAT WILL BE MERGED FROM DATA THAT CCU WILL PROVIDE. VENDOR MUST HAVE THE ABILITY TO READ THE PREDEFINED RECORD LAYOUT AND SPECS. SELECTED VENDOR SHOULD HAVE THE ABILITY TO CREATE

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### TERMS (cont'd):

A TEMPLATE OF EACH NOTIFICATION LETTER TYPE TO DETERMINE WHICH LETTER WILL BE PRINTED.

EACH PRINTED LETTER WILL HAVE TWO SIDES; ONE SIDE WILL BE POPULATED FROM THE MAIL MERGE DATA FLOW. THE REVERSE SIDE WILL HAVE CONSISTENT DATA. THE PRICE IS TO BE QUOTED ON A PER PIECE BASIS INCLUDING THE COST OF PRINTING, FOLDING, INSERTING, MAILING, ETC. THE BILLINGS SHALL BE BEFORE THE ACTUAL NUMBER OF PIECES MAILED.

POSTAGE IS THE RESPONSIBILITY OF THE CCU AND WILL BE PLACED IN THE CCU'S POSTAGE ACCOUNT. THIS IS DONE BY BULK MAIL RATE. USPS POSTAGE STATEMENT MUST ACCOMPANY EACH INVOICE SUBMITTED FOR PAYMENT.

COPIES OF THE LETTERS ARE ATTACHED, AND PERTINENT INFORMATION IS TO BE INSERTED IN THE SELECTED AREAS OF THE LETTERS. INFORMATION IS TO BE SELECTED FROM ELECTRONIC MEDIA IN A TEXT FORMAT VIA CCU'S SFTP SERVER. VENDOR WILL BE REQUIRED TO SUBMIT AN APPLICATION FOR USERS OF CCU'S SFTP SERVER.

ANY ACCOUNTS WITH ADDRESS STATUS Y=INVALID, ARE NOT TO BE PRINTED OR MAILED. THERE WILL BE A SEPARATE FILE PROVIDED SHOWING INDIVIDUAL NAMES AND BUSINESSES. ANYTHING MARKED CODE 2 ONLY REQUIRES A NCOA CHECK NO MORE THAN 18 MONTHS PRIOR.

EACH LETTER MUST HAVE A BARCODE PRINTED ON IT OF THE CCU ACCOUNT NUMBER PRINTED IN A VISIBLE LOCATION TO BE DETERMINED, SO OPENING THE ENVELOPE WILL NOT BE NECESSARY. THE BARCODE MUST BE READABLE AND PRODUCE AN ACCURATE OUTPUT FILE OF ACCOUNT NUMBERS.

THE MAILINGS ARE GROUPED BY THE FOLLOWING CATEGORIES: NCOA (NATIONAL CHANGE OF ADDRESS), FILE CONVERSION, CASS CERTIFY AND PRESENT. ONCE EACH FILE GOES THROUGH NCOA IT MUST BE RETURNED TO CCU IN A SPECIFIC RECORD FORMAT (.CSV FORMAT). THESE WILL BE SUBMITTED IN 3 SEPARATE FILES FOR EACH MAILING SHOWING THE FOLLOWING, ALL ITEMS MAILED, AND A COUNT GIVEN, ALL ITEMS MAILED TO NEW ADDRESS AND A COUNT GIVEN, AND ALL ITEMS UNDELIVERABLE AND A COUNT GIVEN.

\*\*SPECIAL PROGRAMMING IS NEEDED FOR THE MAIF TRIP LETTER TO ENSURE NAME/SECTION IS ASSOCIATED WITH THE CORRESPONDING PHONE NUMBER.

CONFIDENTIALITY. DUE TO THE CONFIDENTIAL AND SENSITIVE NATURE OF THE PERSONAL VARIABLE DATA INFORMATION CONTAINED IN THIS SOLICITATION, THE FEDERAL PRIVACY ACT REQUIREMENTS SHALL BE ENFORCED. PRIOR TO AWARD, A SITE VISIT MAY BE CONDUCTED TO ENSURE SECURITY OF THE OPERATION AND DATA PROVIDED TO THE CONTRACTOR.

NO SUBCONTRACTING - THE ADMINISTRATION OF AND ALL WORK PERFORMED UNDER THIS CONTRACT WILL BE THE SOLE RESPONSIBILITY OF THE CONTRACTOR.

SUBCONTRACTING OF THIS CONTRACT SHALL NOT BE ALLOWED IN WHOLE OR IN PART WITHOUT THE WRITTEN CONSENT OF THE STATE AND ONLY WHEN THE VENDOR HAS ESTABLISHED TO THE SATISFACTION OF THE STATE THAT IT POSSESSES THE NECESSARY PLANT, EQUIPMENT AND FACILITIES IN ACCORDANCE WITH THE FEDERAL PRIVACY ACT TO PROPERLY AND SATISFACTORILY DISCHARGE THE

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RESPONSIBILITY IMPOSED BY THESE SPECIFICATIONS.

PRINTED LETTERS PAPER - PAPER SIZE IS 8 ½" X 11", 20# WHITE RECYCLED BOND PAPER, RECYCLED CONTENT 30% POST-CONSUMER WASTE, OPACITY 85.5 BRIGHTNESS BASIS FACTOR 83, CONTAIN A MAXIMUM OF MECHANICAL WOOD OF 5% AND SUITABLE FOR HIGH SPEED COPIERS, DUPLICATORS AND LASER PRINTERS.

CCU DEBTORS 1,505,000  
MARYLAND AUTOMOBILE INSURANCE FUND 8,100  
MARYLAND DEPARTMENT OF LABOR 15,000  
OFFICE OF THE PUBLIC DEFENDER 85,000  
NATIONAL CHANGE OF ADDRESS 991,000  
NET MAILED 167,100  
CCU DEBTORS/WEEKLY NOTIFICATIONS 900,000

PAYMENT: FOLLOWING DELIVERY AND ACCEPTANCE OF ALL MATERIAL AND EQUIPMENT, THE LEAGUE SHALL SUBMIT AN ORIGINAL INVOICE TO THE FOLLOWING LOCATION:

DEPARTMENT OF BUDGET AND MANAGEMENT CENTRAL COLLECTION UNIT  
300 W. PRESTON STREET, ROOM 503  
BALTIMORE, MD 21201

VENDOR MUST INCLUDE THE 9-DIGIT ZIP CODE OF COMPANY ADDRESS ON ALL INVOICES. FAILURE TO DO SO MAY RESULT IN DELAY OF PAYMENT.

#### BASE CONTRACT TERM

1ST YEAR	MAY 1, 2020 TO APRIL 30, 2021	\$532,671.88
2ND YEAR	MAY 1, 2021 TO APRIL 30, 2022	\$544,912.68
3RD YEAR	MAY 1, 2022 TO APRIL 30, 2023	\$557,472.24

#### OPTIONAL RENEWAL TERM

1ST YEAR	MAY 1, 2023 TO APRIL 30, 2024	\$570,300.12
2ND YEAR	MAY 1, 2024 TO APRIL 30, 2025	\$583,381.50
TOTAL CONTRACT PRICE:		\$2,788,738.42

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<u>LINE #</u>	<u>STATE ITEM ID</u>	<u>U/M</u>	<u>UNIT COST</u>	
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0001	91558	EA	1,635,056.8000	
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MAILING SERVICES (INCLUDING COLLATING, PACKAGING, AND SORTING)

\_\_\_\_\_ END OF ITEM LIST \_\_\_\_\_

THE BLANKET PURCHASE ORDER (BPO) ISSUED AS A RESULT OF THE INVITATION TO BID (ITB) AND ANY SUBSEQUENT AMENDMENTS, MODIFICATIONS OR OPTIONS ISSUED RELEVANT TO THE ITB OR BPO, SHALL COMPLY WITH ALL OF THE TERMS, CONDITIONS AND SPECIFICATIONS ISSUED WITH THE ITB AND ARE INCORPORATED IN AND MADE PART OF THE BPO.

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**AUTHORIZED BY:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

BUYER AUTHORIZED DESIGNEE