

BID OPENING: JANUARY 8, 2009.

BIDS SHALL BE PUBLICLY OPENED AT 11:00 A.M., PREVAILING WASHINGTON, D.C. TIME.

IF YOU HAVE ANY QUESTIONS CONCERNING THESE SPECIFICATIONS CALL (202) 512-1239 AND ASK FOR FRANK YATOR (AST #5). NO COLLECT CALLS.

SPECIFICATIONS

U.S. Government Printing Office (GPO)
Washington, DC

GPO CONTRACT TERMS: Any contract which results from this Invitation for Bid will be subject to GPO Contract Terms (GPO Publication 310.2, effective December 1, 1987 (Rev. 6-01)) and Quality Assurance Through Attributes Program for Printing and Binding (GPO Publication 310.1, effective May 1979 (Rev.8-02)).

"DISPUTES: GPO Publication 310.2, GPO Contract Terms, Contract Clause 5. Disputes, is hereby replaced with the June 2008 clause found at <http://www.gpo.gov/printforms/pdf/contractdisputes.pdf>. This June 2008 clause also cancels and supersedes any other disputes language currently included in existing contractual actions."

SPECIFICATIONS FOR PRINTING, IMAGING AND BINDING OF EMPLOYER'S QUARTERLY FEDERAL TAX RETURN PACKAGE 941, 941SS, and 941PR (MAILOUT) 1st Quarter 2009

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NOTE: Due to the numerous exhibits (14) in this specification, the exhibits will not be put on the Internet. A complete copy of the specifications may be obtained from the bid room by request, telephone 202-512-0526.

Scope: These specifications cover manufacturing and printing of 2,033,456 total packages plus an additional 1,388 copies of Item (e) English SSA Reporter Pamphlet in Package 1; and 1,388 additional copies of Item (e) Spanish SSA Reporter Pamphlet in Package 3. Assembling for trayed mailing; staging; and release to the USPS for mailing. See Exhibit 1 for the quantity breakdown for each package.

General Construction: All packages consist of (a) imaged Form A; (b) unimaged Form B; (c) unimaged Form C (the same Form C is used in Packages 1 and 2; a Spanish Form C is used in package 3); (d) an instruction; (e) an SSA Reporter pamphlet (the same English version is used in packages 1 and 2; a Spanish version is used in package 3); (f) a return envelope; and (g) a mailer envelope. With the exception of Items (c) F941 Schedule B and (e) English Version SSA/IRS Reporter used in packages 1 and 2, the components for each package are unique to that package. **MAILER ENVELOPE MUST SEAL COMPLETELY.**

All packages must meet all the requirements of the U.S. Postal Service and the requirements of the IRS for returns processing.

Package (1) 941 will be assembled with (a) thru (f) inserted into (g).

- (a). Form A * (4-page F941 Mailout).
- (b). Form B (4-page F941 OTC).
- (c). Form C (4-page F941 Schedule B).
- (d). F941 Instruction (8-page).
- (e). SSA/IRS Reporter Pamphlet- **English Version-** (6 page).
- (f). Return envelope (Extended Flap.)
- (g). Mailer envelope (with covered window).

Package (2) 941SS will be assembled with (a) thru (f) inserted into (g).

- (a). Form A * (4-page F941SS Mailout).
- (b). Form B (4-page F941SS OTC).
- (c). Form C (4-page F941 Schedule B).
- (d). F941SS Instruction (8-page).
- (e). SSA/IRS Reporter Pamphlet-**English Version-** (6-page).
- (f). Return envelope (Extended Flap).
- (g). Mailer envelope (with covered window).

Package (3) 941PR will be assembled with (a) thru (f) inserted into (g).

- (a). Form A * (4-page F941PR Mailout).
- (b). Form B (4-page F941PR OTC).
- (c). Form C (4-page F941PR Schedule B).
- (d). F941PR Instruction (8-page).
- (e). SSA Reporter Pamphlet-**Spanish Version-** (6-page).
- (f). Return envelope (Extended Flap).
- (g). Mailer envelope (with covered window).

* **Imaging:** Form A in Packages 1, 2, and 3 require imaging, by either impact or nonimpact printers applied directly to the face in face in two locations: the mailing address located at the top of page 1 and the payment voucher located at the top of page 4 utilizing furnished CD-ROMS's. See Section 3.9.

BID QUANTITIES: Exhibit 1 shows the Government's bid quantity breakdown by IRS Service Center address.

CHANGES IN QUANTITY: The Government, for the FINAL QUANTITY, may submit increases or decreases of up to 25% of the quantities shown in Exhibit 1 until the date specified in the schedule. These quantity adjustments may be made via successive updates of Exhibit 1 or by telephone and will be the FINAL quantity. Billing adjustments for scheduled quantity changes (+ or -) and for subtraction of undeliverables (see Section 5.2) will be at the contractor's quoted "ADDITIONAL RATE". (See Offers Section) If no changes have been received by the scheduled date for final quantity adjustments, the bid quantities will stand as the FINAL quantity.

NOTE: Must be full Final Quantity to all consignees. No shortages or overruns will be allowed.

SUBCONTRACTS: The predominant production function of this contract is Imaging, inserting and mailing. Any other functions, including printing of the envelopes, forms and instructions may be subcontracted per GPO Contract Terms (GPO Publication 310.2, effective December 1, 1987 (Rev. 6-01)). NOTE: The prime contractor is ultimately responsible for monitoring and the quality of work performed by subcontractors. Any bidder who cannot perform both the imaging and mailing portions of this Contract at the same facility will be declared non-responsible.

Section 1 - Schedule

Date	Event
01-08-09	Bid opening.
01-15-09	Award of contract. Forms to be included with preproduction samples sent to banks available for pickup at GPO.
01-26-09	Electronic transfer of files for the following: dummy pages of form, envelopes and new move service center code correction.
02-02-09	Test CD-ROMs to contractor.
02-02-09	Security letter/plan to IRS (see Section 3.11).
02-02-09	Production & Quality Systems Plans to GPO.
02-12-09	Prior to production samples due for Packages 1, 2, and 3. (See Section 3.12)
Negotiated	Preproduction conference at contractor's plant.
02-19-09	Electronic transfer of files for form, instructions, and inserts for Package 1. (Proofs – see Section 3.13).
02-23-09	Electronic transfer of files for form, instructions, and inserts for Packages 2 and 3. (Proofs – see Section 3.13).
02-23-09 – 03-02-09	Address CD-ROMS furnished to contractor.
02-23-09 – 03-02-09	Final day the Government may make package and envelope quantity adjustments (may be by telephone).

Remainder of schedule is based on date CD-ROMS are received and date final counts are furnished by the Government:

3 workdays from	NCOALINK report to IRS (See Section 5.2).
5 workdays from	Drop shipment plan due (See Section 6.7).
7 workdays from	Postage summary reports due (See Section 1.5).
11 workdays from	60% of mail turned over to USPS for Package 1.
14 workdays from	100% of mail turned over to USPS for Package 1.
16 workdays from	SCF and BMC delivery and appointment schedule.
16 workdays from	100% of mail turned over to USPS for Package 2 (941SS) and Package 3 (941PR).

The Government will attempt to meet the schedules as stated in these specifications. However, uncontrollable circumstances such as Congressional Legislation may delay the furnishing of the electronic files. In such event, the schedule will be adjusted in accordance with contract terms.

1.1 Preaward Plant Survey may be conducted by Government Printing Office and Internal Revenue Service personnel to determine if the prospective contractor (and its subcontractors) have adequate facilities and expertise to accomplish the requirements of these specifications.

1.2 Preproduction Conference will be held at the contractor's plant as indicated in the schedule. The purpose of the conference will be to discuss and review all aspects of the contractor's internal and external operations required to complete this contract. Prior to this conference the contractor will submit 2 copies each of detailed written production and quality systems plans. The plans shall be submitted, by the date in the schedule, (1) to IRS, Room 6242, Attn: Alan Robertson, 1111 Constitution Ave NW, Washington, DC 20224 and (1) to GPO, Attn: Frank Yator, AST 5, Room C-829, 732 North Capitol Street, NW, Washington, DC 20401. The proposed quality systems plan is subject to Government approval. The contractor will conduct this preproduction conference during which the production plan will be discussed and the previously approved quality systems plan will be reviewed in depth. Items to be included in the production plan are: 1) processing and sorting master file CD-ROMs, 2) scheduled start-up dates for all phases of production, 3) how coordination/ communication will flow from one production phase to another, 4) who will be responsible for each phase, 5) how will subcontractors be involved and kept informed, 6) specific production dates of all subcontractors, 7) how the product will be staged and/or shipped, and 8) any other special requirements which are specific to this contract. Items to be included in the quality systems plan are covered in the Quality Systems Section. Attending this meeting will be representatives from the Internal Revenue Service and there MAY be representatives from the Government Printing Office. To establish coordination of all required operations, a representative of all subcontractors involved should also be present as well as representatives from each involved production area for the primary contractor. It is also required that the contractor have the local Postal Service representative in attendance.

Note: Contractor must furnish the Government with names, job titles, telephone numbers, and e-mail addresses of on-site plant personnel that will have the authority to discuss contractual/production issues and / or concerns that occur through all phases of production from receipt of government furnished material through mailing and/or shipping of the final product.

Note: The Quality Systems Plan must be approved by the Government prior to the preproduction conference.

1.3 Quality Systems Audit: In connection with the preproduction conference, should the Government elect, a quality systems audit would be conducted. Following the conference, IRS/GPO may conduct an in-depth audit of all contractor quality control methods, quality systems and quality plans in a formal walk-through review of the previously approved written plan. This audit would require the contractor to plan, in advance, all quality related functions which would be required to complete the contract. The Quality Systems Audit shall also include procedures for assuring that all variable data are accurately and completely printed and that all addressed items are mailed. These procedures shall explicitly describe the methods to be used to assure that no records are missed or duplicated during all phases of production. Should subcontractors be involved, a complete audit of their quality systems may also be performed. This procedure will be mandatory for all contractors doing IRS Tax Package work for the first time. Failure to maintain the quality systems in accordance with the contractor's plan approved by the Government, may result in the Government's termination of the contract for default.

1.4 Inspection Notification: 72 hours prior to start of press, imaging, inserting, and mailing operations the contractor must email IRS Form 9558 to betty.j.howard@irs.gov and alan.robertson@irs.gov with the following information: 1) Jacket and Requisition Numbers; 2) Name of company; 3) Location and address of inspection site; 4) Name and phone number of contact person; and 5) Date and time of inspection. Whether IRS elects to be present for the inspection, or waive the inspection, you will be notified at least 24 hours prior to the time for inspection. If IRS fails to respond, proceed as you would have, had there not been an inspection. Do not hold up production unless specifically authorized by GPO. Attendance at, or waiver of, the inspection does not affect any other provisions of the contract.

1.5 Postage Summary: Contractor must e-mail postage summary reports (see Exhibit 9) for each phase for each

IRS service center to alan.robertson@irs.gov no later than the date specified in the schedule. Postage summary reports must show the GPO jacket number; the number of pieces and cost of Carrier Route, 3/5 digit, and Basic broken out by Service Center and the grand total, in a format similar to the one shown in Exhibit 9. The reports are to be submitted following NCOALink processing.

1.6 Shipping Notification: Contractors must submit shipping notification on the final day of shipping. Email the notification to alan.robertson@irs.gov. Contractor must also submit a load plan for each shipment and copies of the 8125's.

Section 2 – Materials

2.1 Furnished by Government:

(1) Electronic Media for forms, instructions, pamphlets, envelopes, Form 6153 Carton Shipping Label (for International packages being sent to DHL); (2) upon request, previous printed samples will be provided, (3) test CD-ROMs and live address CD-ROMs furnished will be ZIP Code sorted and produced in EBCDIC format. Contractors must be capable of reading CD's produced in EBCDIC format. The data will be encrypted/password protected using WinZip 9.0 (256 Bit AES encryption). The password will be emailed to the contractor. CD-ROMs furnished will be ZIP code sorted. Contractor must provide the listings, reports, etc. to perform the mailing operation. Contractor is responsible for coding and assigning all carrier route numbers, endorsements, and delivery point bar codes, (4) IRS Form 13456, IRS Publishing - Postage Report in a fillable PDF file format, (5) IRS Form 13456-A FAX Cover Sheet for IRS USPS Postage Statements, (6) IRS form 9558 – Inspection notification report, (7) a listing of states and zip codes that file at each service center (for correction of new move address service center codes), and (8) forms (one for each bank) to be included with shipment of preproduction samples to banks. (9) CD Video – Safeguarding IRS Confidential Information - A Guide for Contractors (Exhibit 13), (10) Attachment 1 Disclosure of Information – Safeguards (Exhibit 14).

*Note: Electronic transfer will be via e-mail or File Transfer Protocol (FTP), Zip Disk or CD RW disk in Portable Document Format (PDF) generated from Adobe Acrobat 8.0 or later (We will supply a color composite PDF file, and all fonts will be embedded in the files at the PDF level). **Do not unembed fonts!** This may result in a loss of data. The PDF's are backward compatible to Adobe Acrobat 6.0. Prior to image processing the contractor is responsible for checking files to insure that such features as bleeds, register marks, and correct file output selection have been provided for, so as to correctly output for printing. The contractor must supply necessary trapping. High-resolution image processors must be used if generating films. The contractor must verify the accuracy of the Postal barcodes with the USPS output as part of the envelope printing.

Prior to image processing, the contractor is responsible for checking files contained on the furnished diskette to insure that such features as bleeds, register marks, and correct file output selection have been provided. The contractor must supply necessary trapping. High resolution image processors must be used if generating films.

NOTE: If any Government furnished electronic media is unusable, the contractor must contact Alan Robertson (202) 622-3037 within 24 hours. If the contractor fails to do so, no additional time will be allowed in the schedule. No Collect Calls. Contractor must not alter furnished files.

Contractor must schedule an advance planning meeting with the Postal Service, prior to production, to request the furnishing of trays, pallets, trucks and to coordinate a mailing plan.

IMDDS INNER/OUTER LABELS for IMDDS DISTRIBUTION: IRS will furnish electronic files in excel format for the packing list; distribution list; and inner and outer labels. The contractor is required to produce approx. 1,388 each of the inner and outer labels to mail the copies of Item (d) English SSA/IRS Reporter in Package 1 and 1,388 copies of Item (d) Spanish SSA/IRS Reporter Pamphlet in Package 3 (see Section 6) as follows. The contractor will also be required to reproduce the packing list as necessary to be inserted into the shipping containers of each shipment (See Exhibit 12 for additional instructions).

Electronic media provided for Document 12194 “IMDDS ERC Shipping Label” (for outer packages/shipping

containers): Contractor must reproduce approx. 111 labels, 4" x 2" in black ink on white paper stock and affix to each outer package/shipping container. The label must be placed on the outer package (not below the outer label). USPS "readers" look for the last 2 lines of a package to determine mailing locations. Therefore, the outer label should be the lowest label on the outer package. (See Exhibit 12)

DISPOSITION OF FURNISHED MATERIALS: Postal Service will advise contractor of disposition of unused postal pallets. Postal Service will advise contractor of disposition of unused materials furnished by them.

Note: Address CD-ROM's must be kept in a secure environment for 60 days and then shred immediately after a 60 day hold. Upon completion of CD destruction, contractor must submit a signed certificate of destruction to the IRS on company letterhead. CD-ROMs must not be returned to the IRS.

2.2 Furnished by Contractor: All other materials and operations necessary to fulfill the contract requirements, including facsimile transmission capability, any necessary conversion program to utilize Government-furnished CD-ROMs and the following:

The contractor is required to have Internet access provided through an Internet Service Provider (ISP), an email account and a web browser equivalent to Internet Explorer 6.0 or Netscape 4.0. The contractor is also required to have Adobe Acrobat 8.0 Professional (or higher) software (**not Adobe Reader**) and the capability to receive and open file attachments compresses into a Zip (.zip) file format. The contractor must furnish an email address for the IRS to email the forms mentioned above. NOTE: The use of public address or web-based mail servers (ex: Hotmail, Yahoo, Juno) is not permitted.

MAILING VERIFICATION: The contractor *must* update the Electronic Form 13456 (see Exhibit 10) and submit via email to IRS at postage@publish.no.irs.gov and also email to alan.robertson@irs.gov or your convenience, Form 13456 is provided as a fillable PDF file for each GPO job jacket. The IRS will complete the top portion of the form prior to emailing the form to the contractor. If any information is missing or incorrect, contractor must contact Alan Robertson at 202-622-3037.

The contractor is responsible for capturing five data elements from every postage statement (i.e. USPS Form 3602, 3602-R, 3600). The five elements are: (1) barrel stamped post office zip code, (2) postage statement date, (3) quantity mailed, (4) postage amount, and (5) postage statement type.

The form must contain only postage information for the designated GPO jacket. Prior to sending, the contractor must rename the file "GPO Jacket number_date" ie. **123-456_9-02-03.pdf**. If the contractor completes an additional form per day, they should add a suffix to the file name starting with the letter "a" then "b", etc. ie. **123-456_09-02-03a.pdf**. The contractor is responsible for the accuracy of the information returned to the IRS. **Any delay or missing input could result in delay of payment.**

All Postage Statements (i.e. USPS Form 3602, 3602-R, 3600) must contain the IRS Agency Cost Code "**67039**" in the "Federal Agency Cost Code" box. The GPO Jacket Number must be included in the mailer information located in the upper portion of the postage statement.

Faxing USPS Postage Statements: On the same day the completed Form 13456 is emailed, the contractor is also required to FAX all associated postage statement forms to the IRS. Contractor is required to FAX postage statement forms (i.e. USPS Form 3602, 3602-R, 3600) that have received a barrel stamp from the postal service to 1-267-295-7877 (not a toll free number). The first page of every FAX sent to the IRS must be a fully completed IRS Form 13456-A. The number of pages faxed may not exceed 32 pages in any single FAX transmission. The fax must contain only postage statements for the designated GPO jacket number. Contractor must not combine postage associated to multiple GPO contracts in a single FAX transmission.

The form must contain entries in the following fields: Name of IRS publishing analyst, IRS requisition number, GPO jacket number, GPO Contractor number, Name of contractor, Contact person at contractor, Telephone number of contact person, FAX number of contact person, Number of pages faxed (*cannot exceed 32 pages including cover sheet*) and Date of fax transmission.

The date on Form 13456-A "Date of fax transmission" must match the date on the associated Form 13456 "Date of fax transmission". Postage reported on the completed Form 13456 must correspond line by line to the postage statements in the associated fax.

Within three (3) workdays of completion of mailing, contractor must ship via overnight, traceable means, one complete set of all Form 13456s' and barrel date stamped postage statements to: IRS, Room 6236, Attn: Alan Robertson, SE:W:CAR:MP:P:B:T, 1111 Constitution Ave NW, Washington, DC 20224.

2.3 JCP Standards: The specifications of all papers furnished must be in accordance with those listed herein or listed for the corresponding JCP Code numbers in the "Government Paper Specification Standards No. 12" dated February 2008.

Forms and SSA/IRS Reporter Pamphlet - Either White Writing, basis weight: 20 lbs. per 500 sheets, 17" x 22", must equal JCP Code D10; OR White Offset Book Paper, basis weight: 50 lbs. per 500 sheets, 25" x 38", must equal JCP Code A60.

Instruction - Any one of the following: White Newsprint, basis weight: 28 to 30 lbs. per 500 sheets, 24" x 36", equal to JCP Code A10; OR White Writing, basis weight: 20 lbs. per 500 sheets, 17" x 22", must equal JCP Code D10; OR White Offset Book Paper, basis weight: 50 lbs. per 500 sheets, 25" x 38", must equal JCP Code A60.

Mailer Envelopes (with covered window) and Return Envelopes (without window) - White Wove, basis weight: 24 lbs. per 500 sheets, 17" x 22", containing a minimum of 30 percent post consumer recovered material.

Section 3 – Form, Pamphlet, and Instruction Specifications

3.1 Quantity:

- Package (1) 941 – approx. 1,982,343 packages plus an additional 1,388 copies of item (e) pamphlet
- Package (2) 941SS – approx. 7,116 packages
- Package (3) 941PR – approx. 43,997 packages plus an additional 1,388 copies of Item (e) pamphlet

NOTE: Packages (1), (2) and (3) each contain three folded forms (one each of Forms A, B & C); a folded instruction; a folded pamphlet; and an extended flap return envelope inserted into a mailer envelope with the address on Form A visible through the window. With the exception of Items (c) F941 Schedule B and (e) English Version SSA/IRS Reporter in packages 1 and 2, the components for each package are unique the that package. **MAILER ENVELOPE MUST SEAL COMPLETELY.**

3.2 Trim Size:

- Forms A and C for Packages 1, 2, and 3: Each form is 17" x 11" flat, folding to 8-1/2" x 11" and then to 8-1/2" x 3-7/8" with the taxpayer's address information on the top portion of the form appearing through the window of the envelope.
(CONTRACTOR'S OPTION: Forms A and C for Packages 1, 2, and 3 may be printed as 8-1/2" x 22" flat, folding to 8-1/2" x 11" and then to 8-1/2" x 3-7/8".)
- Form B (4 pages) for Packages 1, 2, and 3: 17"x 11" flat, folding to 8-1/2" x 11", and then to 8-1/2" x 3-2/3".
- Instructions for Packages 1, 2, and 3: 8-1/2" x 11" bind on the 11" dimension; fold to 8-1/2" x 3-2/3"
- 6-page Pamphlet for Packages 1, 2, and 3: 25-1/2" x 11" folded to 8-1/2" x 11", then to 8-1/2" x 3-2/3".

3.3 Margins:

- Form A, B & C (Face and Back) - 1/2" head, center left and right
(the margins & detached size for pages 1 & 4 of Form A; and pages 1 & 2 of Form B ; and page 1 of Form C must not vary more than 1/16").
- Instructions for Packages 1, 2, and 3: 1/2" head, center left & right.

- Pamphlets for Packages 1, 2, and 3: Head 1/2", center left and right.

3.4 Ink:

- Form A for packages 1, 2, & 3: Black and Pantone 185 Red
- Form B, Form C, Instructions, and Pamphlets for Packages 1, 2, & 3: Black only.
(Note: Contractor may be required to make simple color separations)

3.5 Printing:

Forms A, B and C (Packages 1, 2, and 3): Forms print head-to-head. The face of Form A prints in black ink and a match of Pantone's 185 Red ink, approx. 10% red ink coverage. The back of Form A and the face and back of Forms B and C print black ink only. The face and back of Forms A, B, and C contain black screen areas equal to a 10% tone of a 110-line screen. No halftones. Forms for packages 1, 2, and 3 print on either White Writing or White Offset Book.

(NOTE: If the contractor chooses to produce Form A as 17" x 11", the orientation of these forms is that the head of the Form 941 is towards the top on the right side of the sheet; and the head of the voucher page is towards the bottom on the left side of the sheet. The right edge of the form and the right edge of the must be a clean edge, not perforated.)

Instructions (Packages 1, 2, and 3): Pages 1-8 print head-to-head, in black ink, with no blank pages, on any one of the following: White Newsprint or White Writing or White Offset Book.

SSA/IRS Reporter Pamphlet (Packages 1, 2, and 3): Print pages 1 thru 6 head to head in black ink, on either White Writing or White Offset Book.

Contractor is required to print IMDDS inner and outer Labels for the English and Spanish versions of SSA/IRS Reporters using the electronic file to be furnished. Ship 1,388 copies each of the Spanish and English versions of the SSA/IRS Reporters (primary order points). IMDDS Distribution List and Packing List (to be furnished electronically) for a quantity breakdown for each delivery address by office. Contractor must reproduce the Packing List as necessary to insert into each shipping container.

IMDDS distribution -- The contractor must manipulate the text from the furnished electronic files to create inner and outer address labels, with a maximum of 8 lines per label as follows: (See Exhibit 12 additional instructions)

The inner label contains:

- 1) The nine-digit OPN and req. no.
- 2) The OPN's attention line (it **does not** contain their street, city or zip)
- 3) The comment line (ex: Dist of Document 7130)
- 4) The File number, catalog number and individual quantity.

The outer label contains:

- 1) The return address (consisting of 4 lines total, including Internal Revenue Service as the heading)
- 2) The req. number
- 3) The comment line
- 4) The file number and catalog number
- 5) The Office's Primary OPN (the first five digits on that label match the first 5 digits of the inner label's OPNS)
- 6) The Office's title and mailing address (consisting of 4 lines total)

IMDDS ERC Shipping Label: Contractor is required to reproduce approx. 111 labels, 4" x 2" in black ink on white paper stock and affix to each outer package/shipping container. The label must be placed on the outer

package (not below the outer label). USPS “readers” look for the last 2 lines of a package to determine mailing locations. Therefore, the outer label should be the lowest label on the outer package. (See Exhibit 12 for additional instructions).

3.6 Folding:

Forms A, B and C (Packages 1, 2, and 3): Fold Forms A, B and C from 17” x 11” to 8-1/2” x 11” with Pages 1 and 4 out. Fold again from 8-1/2” x 11” to 8-1/2” x 3-7/8” using two wraparound folds with Form 941 title out (Form A) and the Schedule B title out (Form C). The first fold is 3-1/4” from the bottom trim edge and the next fold is 3-7/8” from the top trim edge. The taxpayers address information on the top portion of Form 941 (Form A) must appear in the window of the envelope.

(CONTRACTOR’S OPTION: Packages 1, 2, and 3, Forms A, B and C may be printed as 8-1/2” x 22” flat. Fold from 8-1/2” x 22” to 8-1/2” x 11” with Form 941 title and voucher pages out (Form A); and Schedule B title and page 1 of Instructions out (Form C). Fold again from 8-1/2” x 11” to 8-1/2” x 3-7/8” using two wraparound folds with Form 941 title out (Form A); and Schedule B out (Form C). The taxpayer’s address information on the top portion of Form 941 (Form A) must appear through the window of the envelope. **The taxpayer ID number must not appear in the window of the envelope.** Fold Form B from 8-1/2” x 11” to 8-1/2” x 3-2/3” using two wraparound folds with the title out.

Instructions (Packages 1, 2, and 3): Paste on fold on the 11” bind dimension. Fold to 8-1/2” x 3-2/3” using two wraparound folds with the title out.

3.7 Perforations (Forms A and C for Packages 1, 2, and 3): All perforations must be slit or slot (pinhole not acceptable) and provide a clean edge. Perforations must be of such strength as to prevent separation during normal mailing and handling.

VERTICAL Perforations (Package 1, 2, and 3, Forms A and C): Perforate vertically along the 11” dimension at 8-1/2” from the outside trim edge of page 1, to provide a detached sheet size of 8-1/2” x 11”. **HORIZONTAL Perforations** (Packages 1, 2, and 3, Form A only): Perforate horizontally at 3-1/4” from the bottom right trimmed edge, to intersect the vertical perforation and provide a detached size of 8-1/2” x 3-1/4” for the payment voucher.

(Contractor’s Option (Package 1, 2, and 3, Forms A and C): If contractor chooses to produce forms as 8-1/2” x 22”, perforate Forms A and C horizontally at 11” from the top edge. Form A requires two additional horizontal perforations, one at 18-3/4” from the top edge and one at 22” from the top edge. The right edge of the form and voucher must be a clean edge, not perforated.).

3.8 GPO Imprint: Contractor must typeset and insert a GPO imprint line as specified in GPO Pub. 310.2.

3.9 Computerized Imaging (Form A in Packages 1, 2, and 3): Computerized imaging is required by either impact or nonimpact printers directly on pages 1 & 4 of Form A only utilizing the information contained on the furnished CD’s. **CAUTION:** The image area for Form A is approximately 12” x 9-1/2”. It is the contractor's responsibility to ensure that the imaging equipment used on this contract has the capability to image all required areas. (See Exhibit 7).

Imaging must meet the following specifications:

- a) The font must be OCR-A, Font size 1, 10 pt.
- b) The imaging must be black ink.
- c) All characters must align.
- d) No missing data or entries.
- e) No duplicate data or entries.
- f) Imaged address area will have no more than 5 lines. (7 lines including carrier route line and delivery point barcode)
- g) There will be a maximum of 39 characters per line and spaced 6 lines per inch vertically.
- h) No broken characters.
- i) No smearing.

- j) No visible wicking.
- k) No visible gloss.
- l) Reflectance of characters shall be visually uniform across the whole label.

Address Copy Changes: The addresses change from package to package. Carrier route endorsement and other optional endorsement lines must be in one, set position throughout the run and appear, with the address, within the window of the mailer envelope of Packages 1, 2, and 3 (see exhibit 7, page 11). **The taxpayer ID number must not be visible in the window.**

Addresses and other information are to be placed by computerized imaging directly on pages 1 & 4 of Form A for Packages 1, 2, and 3. If the furnished CD-ROMs do not conform to contractor's equipment, the contractor must take IRS data and reformat it to produce all of the required information using their own equipment.

Unique Number: The contractor will also be required to produce a unique number (that may be printed on page 4 (Exhibit 7 page 9) of packages 1, 2, and 3), so the contractor may retrieve & reproduce records for any unusable forms, by using their equipment. If the unique number contains more than 10 characters, it must NOT begin with 1800, 1866, 1877, 1888, or 1900. The contractor will be furnished a record layout (see Exhibit 7 pages 1-6).

NOTE: If the addresses for Package 1 do not contain a second name line, leave a blank line between the first name line and the address line (See exhibit 7, page 8). The EIN must have a clear band, at least 1/16" in width, from the top and bottom of the EIN.

See Exhibit 7 for examples of the information that is required to be imaged. The contractor will be required to take information from the furnished CD-ROMs and format it to create an 11 digit Delivery Point Barcode for the purpose of the Government receiving the U.S. Postal Service's delivery point bar-coded mail discounts. This Barcode is to be imaged within the corner marks near the top of the page, below the last line of the address, in accordance the current USPS Domestic Mail Manual.

Planet Bar Code (for Package 1 only): Contractor must also create a USPS Planet Bar Code that must be imaged in the top portion of Form A above the taxpayer address, following USPS regulations. The planet code must be obtained from **Trackmymail.com** and consists of 12 digits represented in a full and half bar configuration. Trackmymail.com will provide a planet code font electronically to the contractor. The planet code is to be placed on every 20th address file. The contractor must put together a file containing zip codes and the number of pieces to each zip code of all planet code addresses and submit to **Trackmymail.com** to enable the detailed map of planet code results to be displayed in color. The contractor, through Trackmymail.com, will provide custom mail tracking capabilities that can break planet code information down by state, date, and SCF utilizing planet bar code. Tracking reports must be submitted on a daily basis. The planet code must be imaged on Prior to Production samples as specified in paragraph 3.10. Contractor must contact its local postal representative for specific instructions (See Exhibit 7, page 11).

Voucher: There is a payment voucher located at the top of page 4 of Form A (Packages 1, 2, and 3). Most of the information that will be imaged on the voucher is the same information that is imaged on page 1, with the exception of : the carrier route endorsement and barcode; the addition of one OCR-A voucher scan line; and an IRS P.O. Box address (see Exhibit 7). The size of the detached voucher is 8-1/2" x 3-1/4". The voucher scan line must be vertically positioned 1/2" from the bottom of the voucher to the bottom of the scan line. The rightmost character of the scan line must be placed 3-1/2" from the right (leading) edge of the document. The recommended maximum displacement is no more than .014" between characters. The scan line must have a clear band at least 3/8" in width, from the top of the scan line to the bottom of the address line above.

NOTE: Name and address character positions 42 - 205 will be repeated above and to the left of the voucher scan line in an area 3" x 9/16". Print each group of 40 bytes, line by line, beginning with the 1st name line followed by the 2nd name line, street address, city, state and zip code. Taxpayer ID number (TIN) character positions 04-13 will be repeated above and to the left of the voucher scan line in an area 3" x 1/4" (See Exhibit 7 page 10). The contractor will have to create and image the appropriate IRS P.O. Box address above and to the right of the voucher scan line in an area 3" x 9/16". Each IRS Service Center will have a different P.O. Box address. The contractor will use the IRS P.O. Box address on the extended flap of the approved return envelope proofs. The IRS P.O. Box address will be the same for each taxpayer within the same IRS Service Center (See Exhibit 11

for a listing of the states within each service center and their corresponding IRS P.O. Box Address).

After the IRS P.O. Box addresses have been programmed in (but prior to passing the file), the contractor must submit, as soon as the contractor deems necessary in order to comply with the contract schedule, a printout by e-mail to Dotis.E.Bethea@irs.gov and Maria.Y.Jackson@irs.gov marked Lockbox Address Proof, with the GPO Jacket number for approval to ensure that the programmed addresses are in conformance with the approved return envelope proofs. Approval, conditional approval, or rejection will be given (by telephone or e-mail) within one workday of receipt in the IRS.

3.10 Quality Control: The contractor must maintain a thorough quality assurance program to guarantee that not more than 6% of the delivered forms contain an illegible (non-scannable) line when run on a Scan-Optics Series 9000; Banc Tec Models TRP 700, 9400, 9500, DP500; or Unysis scanner models. One questionable character in any of the print constitutes an illegible line. The contractor must immediately replace any damaged, mutilated or illegibly addressed forms during the imaging operation. Any packages damaged so as to be unusable during the folding and inserting operations must be replaced at the end of the run by using the unique number on the forms to rerun replacement. These packages can go with the residual mail but must be accounted for with the IRS mail coordinator and/or mail listing. Spoiled and recaptured mail must be catalogued in a database. The database report must be emailed to alan.robertson@irs.gov at time of completion.

Spoiled Packages: The contractor must replace all spoiled imaged packages. The contractor must provide sufficient detail to fulfill the contract requirements for 100% mailing that there are no missing pieces.

Production Interruptions: Anytime an equipment, materials or personnel interruption occurs (machine problems, web break – printing or imaging, roll changes, shift changes, etc.), whether printing, printing and imaging or imaging only, the onsite IRS Resident Coordinator/Quality Monitor (if applicable) must be notified. This will be done to allow the Quality Monitor to observe the last correct piece, the destruction of all bad pieces and the new first correct piece. The Quality Monitor must also have access to the contractor log containing this information for each piece of production equipment.

3.11 CD-ROM Security and Security Letter/Plan: The contractor must guarantee that it and any of its subcontractors will not reproduce, or allow reproduction of, the CD-ROMs furnished by IRS, nor use or allow any person to use the CD's or addresses themselves for any other purpose than mailing the tax packages. The contractor must email to alan.robertson@irs.gov a detailed report of the inventory and tracking system and the security measures to be taken to secure the IRS CD-ROMS, and any information output from them, throughout the period the contractor and/or subcontractors have possession of taxpayer information. (See IRS Pub. 1075 "Tax Information Security Guidelines for Federal, State and Local Agencies". A copy may be obtained either from the Internet by entering <http://www.irs.gov> then click on forms and pubs, or from IRS by calling 1-800-829-3676. (Also see Privacy Act Exhibit 6). The IRS will also provide the contractor with the video, Publication 4465, Safeguarding IRS Confidential Information and Publication 4465-A, IRS Disclosure Awareness Pocket Guide.

Unusable CD's: The contractor may notify IRS Enterprise Computing Center (ECC) directly for missing CD-ROMs and/or for replacing CD-ROMs received in unusable condition or out of ZIP code sequence. *If the contractor has not reported any discrepancy to the Government, within five (5) workdays after receipt of CD-ROMs, it will be taken that none exists.* Call ECC Production Control Help Desk (304) 264-7501 and provide the following: Job Run File ID; Batch Cycle Group; CD number; and a brief explanation of the problem. The contractor will be required to develop software to edit and reposition the various data elements taken from the CD-ROMs to be applied in the required areas of each package.

Note: The contractor must maintain all Address CD-ROM's 60 days after completion of this contract, then shred all CD-ROMs immediately after the 60 day hold. Please keep the CD's in a secure area. CD-ROMs must not be returned to the IRS.

3.12 Prior-to-production samples (required for Packages 1, 2, and 3): Using furnished electronic media for dummy pages of Form A, submit 2,460 total samples (Package 1 – 1,370; Package 2 – 545; Package 3 – 545) printed in black ink and in Panetone's 185 Red ink, and imaged (include NCOA "#" symbols that will be used to identify new move addresses on 70 samples of Package 1) in black ink (use test CD-ROMS's for imaging 2,540 samples; and use the "James A and Andrea A Business," scan line information below for imaging 100 samples) on specified stock. The 2,330 samples which are to be imaged using the test CD-ROM's must have the

corresponding IRS P.O. Box Address imaged in the correct position on the payment voucher (See Exhibit 11 for a listing of the states within each service center and their corresponding IRS P.O. Box Address). NOTE: The 10 samples of Package 1 containing the NCOA bars to be sent to Alan Robertson must also be accompanied by the associated computer dumps.

Submit samples no later than the date specified in the schedule. Samples are to be shipped at the contractor's expense, by an overnight delivery service. Contractor must include a copy of his shipping documents along with the samples submitted to the IRS to show that the remaining samples have been sent and include the furnished forms with samples shipped to banks (one form per shipment per bank). These samples will be used to test for proper type font, spacing, alignment, stock, imaging quality, etc. Contractor will be given an approval, conditional approval, or rejection within 5 workdays after receipt in IRS. Contractor is not authorized to print prior to his receipt of an approval or conditional approval.

The following "James A and Andrea A Business" scan line information is to be imaged on 100 test samples:

TIN: AA 32-3456789
 ECRLT **CO 17
 MAR2009 S29 C
 Name JAMES A & ANDREA A BUSINESS
 and JAMES A & ANDREA A BUSINESS
 address 16305 Main Avenue N.W. 000 [denotes tray number]
 data: ANYTOWN US 99999-9999
 [include delivery pt. barcode]

scan line: 323456789 AA 0000 01 2 200903 610

IRS Internal Revenue Service
 P.O. Box P.O. Box 0000
 address Cincinnati OH 99999-0000
 data:

Ship 25 (**intact**) copies of Package 1, imaged using the "**James A and Andrea A Business**" scan line information (also include shipping documents proving remaining samples have been sent) to U.S. Government Printing Office, Stop CSAB, Room C-A843, 27 G St. NW, Washington, DC 20401. The container and accompanying documentation must be marked "Attention: IRS Desk, PRIOR-TO-PRODUCTION SAMPLES" and must include the GPO Jacket Number.

Ship 25 (**intact**) copies each of Package 1, 2 and 3, imaged using the "James A and Andrea A Business" scan line information to - Internal Revenue Service, C5-163, Attn: Doris Bethea, SE:W:CAS:SP:RD:LP, 5000 Ellin Rd., Lanham, MD 20706.

Ship 2,360 (detached) samples imaged using the test CD-ROMs as follows. **Forms must be perforated, then detached (not cut) to provide an 8-1/2" x 11" Form 941 and an 8-1/2" x 3-1/4" 941V - payment voucher.** (Include one furnished form per bank shipment and all container labels must be marked "TEST SAMPLES for IRS Package 941- 1st Qtr".)

500 copies of Package 1, Service Center 29 Odgen); 500 copies of Package 2; and 500 copies of Package 3 to: Bank of America, 2059 Northlake Parkway, Attn: David Talford, Tucker, GA 30084-5399.

500 copies of Package 1, Service Center 17 Cincinnati to: US Bank, Cincinnati, OH (Austin Service Center 18), 1401 Dalton Avenue, Attn: Kerri Behanan, Cincinnati, OH 45214

10 copies of Package 1 (5 each of service centers 29 and 17) and 10 copies each of Packages 2 and 3 (Include 10 samples of Package 1 with the NCOA "#" symbols plus computer dumps) to: IRS, Room 6236, Attn: Alan Robertson, SE:W:CAR:MP:P:B:T, 1111 Constitution Ave NW, Washington, DC 20224.

10 copies of Package 1 (5 each of service centers 29 and 17) and 10 copies each of Packages 2 and 3. (Include

10 samples of Package 1 with the NCOA “#” symbols) to: IRS, C5-163, Attn: Doris Bethea, SE:W:CAS:SP:RD:LP, 5000 Ellin Rd., Lanham, MD 20706.

300 copies of Package 1 (150 each of service centers 29 and 17). (Include 50 samples of Package 1 with the NCOA “#” symbols) to: IRS, M:I:S:SD:SP:DI:SC, A3-252, Attn: Ramona Henby, 5000 Ellin Road, Lanham, MD 20706.

3.12 Proofs: Contractor must submit 2 sets of Dylux, or similar proofs for Forms A, B and C (Packages 1, 2, and 3), and the Instructions (Packages 1, 2, and 3); plus 3 sets of Dylux or similar proofs each for the English and Spanish Versions of the 6-page SSA Reporter Pamphlet.

At contractor’s option, digital proofs created using the same Raster Image Processor (RIP) that will be used to produce the product may be furnished. Proofs provided must be of 1200 DPI Resolution or better. Proofs must be printed on the actual production stock, must be 2-sided, trimmed and folded to replicate finished product. Proofs must be submitted within 5 days after receipt of electronic files. Proofs will be withheld 5 workdays from receipt in the IRS until they are made available for pickup by the contractor. Contractor is not authorized to print prior to his receipt of an approval or conditional approval. At the government’s request, one revised proof may be requested. Revised proof will be held two (2) days from receipt at IRS until made available for pickup.

If, in the opinion of the GPO and/or the IRS, the proofs are not a true representation of the furnished copy, or if any contractor’s errors are considered serious enough in the opinion of GPO, revised proofs may be required and are to be provided at no additional expense to the Government. No additional time will be allowed for this reproofing and such operations must be accomplished within the original production schedule allotted in this contract.

Submit 2 sets of proofs for each item by traceable means to: Internal Revenue Service, SE:W:CAR:MP:P:B:T, Room 6236, Attn: Alan Robertson, 1111 Constitution Ave NW, Washington, DC 20224. The container and accompanying documentation must be marked “FORMS/INSTRUCTION/INSERT PROOFS” and must include the GPO Jacket Number.

Submit 1 set of proofs each for the English and Spanish Versions of the SSA/IRS Reporter to: John Berger, 283 Rugby Cove Rd., Arnold, MD 21012.

Section 4 - ENVELOPE SPECIFICATIONS (Packages 1, 2, and 3)

4.1 Size and Quantity: See Exhibit 1 for quantities of each Package (camera copy is different for each package).

Mailer Envelope: 4-3/4” x 9-3/4”; approx. 1-1/2” x 4-3/4” covered window on the face; located approximately 1” from the left face edge and 1-3/8” from the bottom face edge. See Exhibit 3 for envelope dimensions but contractor must determine exact placement of window so mailing information shows after form is inserted. The check digit and taxpayer identification number are not part of the mailing information and must not be visible through the window. **NOTE:** It is the contractor’s responsibility to determine the final size and position of the window after the receipt of the print files and the position of the imaging has been determined.

Extended Flap Return Envelope : 4-1/4” x 9”.

4.2 Paper: White Wove, sub. 24.

4.3 Ink for Envelope Printing (Ink must be carbon based): Mailer Envelopes print black only. Extended Flap Business Return Envelopes print Pantone 100 Yellow and black.

4.4 Construction: All envelopes must have a fold at bottom, the bottom may not be glued. No perforations are allowed on the bottom or top folds.

Construction options for Mailer Envelopes (Manufacture diagonal seam or side seam): Side seam envelope – the gum line must be applied along the length of the flap to within not more than 1/2” of each end of the flap and must be 5/8” wide. Diagonal seam - the gum line must be applied along the length of the flap to within not more than 1/2” of each end of the flap and must be at least 1/2” wide. Envelopes must be completely sealed prior to mailing.

(See Exhibits 2 and 3).

Construction for Extended Flap Return Envelope: Manufacture open side with side seams and a 2-3/8" flap with a 1-3/4" x 7-1/2" gum line. Perforate (slit or slot without ink) the flap in three places: once horizontally 1-1/4" from and parallel to the flap fold and vertically in two places 3-7/16" from left and right edge of the flap (See Exhibit 4).

4.5 Printing:

Mailer Envelopes: Envelopes print face and back in black ink. Copy is unique to each package. One copy change is required for the mailer envelope used for Packages 1 and 2 - the postage permit indicia is removed for approximately 908 total copies for DO 96, 97, and 98 International mail.

Extended Flap Return Envelopes: Envelopes print face and back with black ink. The outside (ungummed) of the flap prints black and Pantone 100 Yellow. There are three different versions of the Extended Flap envelope for Package 1. Package 2 and 3 contain one version of the Extended Flap envelope. See Exhibit 1 for the quantity breakdown.

4.6 Sorting Codes: Each postal sorting bar code is comprised of fifty-two full and half-bar configurations and is for scanning by the U.S. Postal Service. A Postal Bar Code will print below each of the two addresses on the extended flap of each return envelope. Postal Bar Codes will be in position in the furnished files. It is the contractor's responsibility to check the postal bar codes for accuracy.

4.7 Facing Identification Marks (FIM Bars) are printed in the upper right face of envelope. They print the same on all extended flap envelopes. FIM Bars will be in position in the furnished files.

4.8 Envelope Proofs: Contractor must submit 3 sets of constructed proofs for each service center return envelope and each mailer envelope. Submit proofs as soon as the contractor deems necessary in order to comply with the contract schedule. Contractor will be given either an approval, conditional approval, or rejection, may be by telephone. Proofs will be withheld 4 workdays from receipt in the IRS until they are made available for pickup by the contractor. Contractor is not authorized to print prior to his receipt of an approval or conditional approval. At agency request, one revised proof may be requested. Revised proof to be held 2 workdays from receipt at IRS until made available for pickup by the contractor.

Submit 2 sets of proofs for each service center return envelope and mailer envelope by traceable means to Internal Revenue Service, SE:W:CAR:MP:P:B:T, Room 6236, Attn: Alan Robertson, 1111 Constitution Ave NW, Washington, DC 20224. The container and accompanying documentation must be marked "ENVELOPE PROOFS" and include the GPO Jacket Number.

4.9 Envelope Quality Control Procedures: The prime contractor must establish and administer a quality assurance program which will ensure all envelopes meet specifications whether they are produced "in line" or at a subcontractor's site.

4.10 Subcontractor: If envelopes are produced by a subcontractor, production must be completed in sufficient time and available for quality assurance inspections. This schedule is to facilitate timely replacements necessitated by failure to meet contract specifications.

4.11 Envelope Samples: Immediately after the start of envelope production, contractor must send samples of each envelope (mailer & business reply envelopes) by an overnight delivery service, at contractor's expense, to IRS. See Production Samples Section 7.8 (B).

Section 5 - Addressing and Mailing of Tax Packages

5.1 Imaging Quantity: Contractor is required to image taxpayer information, name, and address on approximately 1,982,343 Package 1 (Form A); 7,116 Package 2 (Form A); and 43,997 Package 3 (Form A). The contractor is to call GPO IRS desk 202-512-0307 for instructions on how to handle any remaining copies after the addressing is complete.

5.2 Preparation for Mailing and NCOALink, LACSLink, & Delivery Point Validation: IRS will furnish the contractor with imaging CD's sorted by ZIP code. The service center code included in the record layout can be used by the contractor for sortation of addresses by service center. The raw data contained on these CD's has been passed through Finalist Software (equivalent to Code 1 of Group One Software) for hygiene and standardization. Contractor is responsible for taking the IRS raw data file and, using a licensed full service NCOA^{Link} provider, passing the file against the National Change of Address^{Link} (NCOA^{Link}), LACSLink, and DeliveryPoint Validation (DPV). file. Contractor must provide IRS with a file of the NCOA^{Link} Return Codes listing the return code, the address designation, and the how description code. In addition, contractor must provide all applicable reports. Email the file to alan.robertson@irs.gov.

Contractor must specify in their bid the name of the NCOA^{Link} licensed full service provider to be utilized (see Offers Section 8.6).

Contractor must pass the entire file against a Coding Accuracy Support System (CASS) certified software address hygiene program. Contractor's software must also be Presort Accuracy Validation and Evaluation (PAVE) certified

Contractor must use Group 1 International cleansing software or equivalent to increase deliverability of the foreign mail.

Undeliverables: **Code 03/closed post office box, Code 02/ no forwarding address, and Code 01/ foreign move** will be taken out of the mailing. Provide IRS with a summary report of the NCOA^{Link} Return Codes listing the return code, the address designation, and the how code. The summary report will include the number of undeliverable mail pieces and the number of good move address mail pieces as well. Email this report to alan.robertson@irs.gov within 3 workdays of completing NCOA^{Link}.

Contractor must select the new move addresses from the mail file, verify the service center code of the new move addresses (making all necessary service center code corrections) using the furnished electronic file, and merge the new move addresses back into the mail file. There are expected to be approx. 35,000 new move addresses of which approx. one percent will require correction of the service center code.

Change of Address Indicator: Image “#” symbols vertically, to identify each new move address with a space between the symbols. Image at least 4 “#” symbols vertically, to the left of the taxpayer's name and address (see Exhibit 7). NOTE: When the Change of Address indicator is present, the check digit must be suppressed but the EIN must remain in the same position (see Exhibit 7).

NOTE: The information contained on CD-ROMs provided to IRS must be formatted, as for an address label. Computer dumps are not acceptable.

5.3 Carrier Route Presort: Contractor must utilize a commercially prepared software package for assigning a portion of the mail file in an approved carrier route format (carrying carrier route endorsement and number on first line of the mailing address).

The contractor's software package must also analyze and resequence mail lists for tray optimization. It must provide bar-coded tray tags coded to addresses.

In general, the carrier route mail preparation must consist of tying or wrapping packages of ten or more pieces per carrier route. The number of pieces per carrier route is indeterminate, and random (may be resequenced) but will be at least ten. The contractor must tie by carrier route quantities less than a full tray.

Presort Palletization: As outlined by the Postal Service in the current Domestic Mail Manual, the carrier route presort palletization program requires that in most cases, depending on the thickness and weight, individual packages of ten or more pieces be prepared for carrier routes. This may take the form of packages or packages in bundles presented on pallets. See current DMM for specific requirements.

5.4 Carrier Route Address: Each carrier route address must contain a carrier route endorsement and carrier route number. There must be no carrier routes that have fewer than ten pieces. Each new carrier route must be identified by change indicators in the address area.

5.5 Carrier Route Listing: Contractor must provide printout listings for the carrier route portion that show the number of pieces for each carrier route, within ZIP Code, city and state. A subtotal by 5-digit ZIP Code, 3-digit ZIP Code, residual mail, and service center must also be provided.

5.6 USPS Regulation Compliance: The contractor must comply with all U.S. Postal Service regulations governing Standard Mail (or parcel post, for some bulk shipments), as outlined in the current Domestic Mail Manual (DMM).

5.7 Tray Numbers: The addressed packages must carry a tray number/code.

5.8 ZIP Code Sequence (within the Service Centers): Contractor must maintain addresses in ZIP code sequence. The first address with either a new five-digit ZIP code, new carrier route, new package or tray must contain change indicators in the City, State Zip Code line.

5.9 ZIP Code Count Listing: Contractor's software must provide 3-digit, 5-digit, and carrier route ZIP Code count report for the contractor's use during the addressing operation. A copy must also be provided to the IRS resident coordinator.

5.10 IRS Resident Coordinator: One or more IRS representatives may be on-site at the contractor's facility to provide project coordination in the receipt, verification and organization of the address CD-ROMs; monitoring all stages of production, mailing and distribution of the tax packages. These coordinators do not have contractual authority and cannot make changes in the specifications or contract terms but are to bring any and all defects they see to the attention of the contractor's Quality Control Officer. These coordinators will have full and unrestricted access to all production areas where IRS work is being produced. The contractor will furnish office space to include a desk, telephone, personal computer with CD drive and internet access to send and receive e-mail. Personal computer must be loaded with Adobe Acrobat 8.0, Microsoft Word and Microsoft Office 2003 for submitting reports. Access to a fax machine will also be required for the coordinators. This space will be in an enclosed, secure area adjacent to the addressing/ mailing operations. Long distance telephone charges will be reimbursed by the Government. Desk and telephone access is also required for a postal clerk during the turnover of packages to the Postal Service. The contractor and resident coordinator will conduct product sampling as part of the Quality plan. The contractor must make (12) random daily pulls and the monitor will make (32) random daily pulls off each production line. These samples are outside the scope of any sampling the contractor may do as part of their own internal quality plan and must be captured as spoilage and put back into the mailing. The contractor must maintain storage of these samples for a warranty period of 120 days as outlined in GPO contract Terms (see section 7.3).

5.11 Daily Production Report: The contractor will provide daily production information required to complete Report Form 9659 (See Exhibit 5). The IRS Resident Coordinator will email this report every weekday to betty.j.howard@irs.gov and also to alan.robertson@irs.gov. In the absence of the coordinator, contractor must email the report as specified above. ALL PRODUCTION DATA, ETC., WILL BE KEPT IN STRICT CONFIDENCE BY THE GOVERNMENT.

5.12 Loading Information: In addition to daily production report, contractor must furnish a copy of postal service loading sheets, as trailers are released.

5.13 Order of Addressing: Addressing may be affected by Turnover Requirements, See Section 6.9.

Section 6 - Packing and Loading Packages (F.O.B Contractor's City/F.O.B Destination)

6.1 Postal Pallets and Trays: The U.S. Postal Service will furnish trays and pallets upon contractor's request. Contractor may utilize their own pallets that meet postal requirements at their own expense. Loaded pallets must be wrapped with a shrinkable or stretchable plastic strong enough to retain the integrity of the pallet during transportation and handling. Pallets must be prepared in accordance with the requirements outlined in the current DMM for "Packages and Bundles Presented on Pallets" and "Palletizing Sacks". See the current DMM for preparation requirements for palletizing Standard Mail. Packages must palletized separately from sacks. The sack tags must be barcoded and readable by USPS equipment. Further details on pallet loading and flagging may be obtained by consulting local Postal Customer Representatives or regional pallet team.

6.2 Tray Loading and Marking: The Postal Service Standard Mail rate will be used for this mailing. The contractor must comply with the requirements of the Postal Service, as outlined in the current Domestic Mail Manual (DMM).

6.3 Internal Tying: Pieces may be packed loose (no internal wrapping or tying) in either carrier route or 5-digit ZIP code direct trays. All trays containing mixed carrier routes or 5-digit ZIP codes require internal wrapping or tying in direct bundles of ten or more pieces. See current Domestic Mail Manual for more details.

6.4 Standard Mail Rate: The Postal Service will verify the total weight of the mailing. No optional mailing procedures will be allowed, all mail must be weighed. IRS will not apply for plant load authorization nor optional acceptance procedures. The contractor must comply with all current Domestic Mail Manual regulations governing use of Standard Mail (or parcel post, for some bulk shipments). The IRS will obtain the bulk mail permit for this mailing. All stamped Postage Statements, with the IRS Agency Cost Code "67039" in the appropriate box, must be sent via traceable means upon completion of the mailing as indicated in Section 2.2 of this contract and must be completed for each truckload shipment leaving the contractor's facility.

6.5 Location of Point of Entry: Contractor will specify in his bid the location of his proposed point of entry for the tax package mail (see Offers Section 8.5).

6.6 Postal Trucks: If truck-trailers (vans) will be needed from the U.S. Postal Service it is the contractor's responsibility to schedule an advance planning meeting with the Postal Service and request these services. However, physical loading is contractor's responsibility in conformance with the U.S. Postal Service loading plan.

6.7 USPS Plant-Verified Drop Shipments: The contractor will be required to drop ship all mailed quantities directly to the BMCs and SCFs, and to accomplish this, must prepare and implement a detailed plant-verified drop shipment plan, the cost of which must be included in the contractor's total bid price; a separate charge will not be allowed for any administrative costs for preparing and implementing the drop shipment plan.

On or before the date in the schedule, the contractor MUST submit its detailed plant-verified drop shipment plan, which is subject to government approval, for direct shipments to the BMCs and SCFs. The detailed drop shipment plan must be submitted to fyator@gpo.gov and also to alan.robertson@irs.gov. The drop shipment plan must be basically in the format shown in Exhibit 8 page 1, showing the piece count, approximate weight, postal discount, freight charges, net savings, number of transit days for each shipment, fuel surcharges, air freight charges and net postage costs to the Government.

Reimbursement for the actual freight costs will be made from copies of the commercial carrier freight bills that must be submitted with the contractor's invoice, and each freight bill must show the shipping cost and weight of the shipment. If the contractor utilizes a freight consolidator, payment will be made with submission of the consolidator's invoices showing actual charges to the contractor. Reimbursed freight costs will not be subject to any "prompt payment discounts." The contractor must provide the scheduled dates for dropping at the BMCs and SCF, etc. (see exhibit 8). Contractor must include copies of USPS Forms 8125 signed by recipient at destination with their freight bills/invoices or Track/Trace reports showing the appointment dates and USPS furnished confirmation numbers. Freight charges must not exceed those in the furnished drop shipment proposal, except for allowable fuel surcharges. Current allowable fuel surcharges must be included in the plan.

6.8 SCF and BMC Appointments: Contractor must submit logistics plan outlining SCF and BMC appointments.

6.9 Turnover requirements: The priority for the mail turnover is as follows: 1) Approx. 8,000 packages for Alaska, approx. 12,000 packages for Hawaii; approx. 44,000 for Puerto Rico; and approx. 3,000 for Guam, which are part of the Ogden Service Center; 2) then packages for the furthest destinations; and 3) packages for the closest destinations.

The packages for Alaska, Hawaii, Puerto Rico and Guam must be delivered via AIRFREIGHT, within 3-5 days

after release by the contractor. If the quantity to any one of these destinations is less than 200 pieces it must be sent via AIRFREIGHT and marked to the specific postmasters (see Exhibit 1B for additional information). The costs for these deliveries will be reimbursed by the Government and must be included in the drop shipment plan (see Section 6.7).

6.10 Packing

F.O.B. Contractor City: Consignments weighing less than 1 pound must be mailed via reimbursable (contractor must prepay postage) First Class Mail.

The balance of consignments weighing 750 lbs. or less to one destination, must be shipped via UPS using an IRS account number which will be provided after award. The print contractor must have the capability to generate UPS shipping labels electronically. It is the print contractor's responsibility to be familiar with UPS electronic shipping methods. There are several methods to generate electronic shipping labels, either through a UPS shipping system, UPS WorldShip System or UPS Internet Shipping) or a 3rd Party Shipping Software (Pitney Bowes Shipping Software, etc.). In addition to basic addressing requirements, UPS shipping systems provide two reference fields "GPO Jacket Number" and "IRS Print Requisition Number" that are required to be used.

SSA/IRS Reporter Pamphlets: Contractor will prepare and mail/ship approx. 1,388 copies each of Item (e) SSA Reporter Pamphlet for Package 1 (English Version) and Package 3 (Spanish Version) using furnished inner and outer labels to approximately 111 nationwide destinations in quantities ranging from 1 to 500 copies, via the appropriate method, using the appropriate shipping container (outer) labels. (See Exhibit 12 for additional instructions).

Packing Requirements for inner/outer labeling: For "IMDDS Copies", whenever there is more than one office receiving copies at the same delivery address and there are not full carton quantities of the same office, the copies must be wrapped (Kraft paper or Shrink-film) or banded, by office, in packages not to exceed 6" in height and packed in shipping containers. Packages for offices within the same delivery address (primary order point) must be consolidated in shipping containers, keeping multiple packages for the same office in the same container whenever possible. Each delivery address will be designated by a primary order point number of 5 digits. Each office within the same delivery address will be designated by an order point number of 9 digits. The first 5 digits of an order point number will be common for all offices at the same delivery address and match the primary order number for that address. The 4 digit extension designates the specific office within the delivery address.

The Contractor will be provided a packing list for shipments to delivery addresses receiving copies for more than one office. The packing list must be reproduced as necessary and inserted in the shipping containers for each shipment. The provided packing list will contain the primary order point number, a breakdown of the quantities by order point number, item, and catalog number.

Inner and Outer Labels (used with SSA/IRS Reporter Pamphlets on the outer package/shipping container): Package the quantity specified that is indicated on both the distribution list (use for verification) and INNER Label; affix the corresponding label to the outside of the package(s). All packages labeled with OPNs beginning with the same first 5 digits will be consolidated as specified by the packing list and bulk packed into the least number of shipping containers possible. Consignments requiring multiple shipping containers to a single address must have the shipping containers numbered 1 through however many containers are involved (i.e. "Box 1 of 6", "Box 2 of 6", etc.). The appropriate portion of the distribution instruction insert (packing list) to be furnished must be included in the first shipping container ("Box 1 of _") for each bulk destination. The appropriate "matching" OUTER label with the matching numbers will be affixed to the outside of each shipping container. Shipping container packages are correct when the first 5 digits on the INNER labels "match" the office code of Bigelow, M:I:S:SP:EI:TS, Bldg. A3-370 the OUTER label. (See Exhibit 12)

Document 12194 "IMDDS ERC Shipping Label" (used with SSA/IRS Reporter Pamphlet on the outer package/shipping container): The label must be placed on the outer package (not below the outer label). USPS "readers" look for the last 2 lines of a package to determine mailing locations. Therefore, the outer label should be the lowest label on the outer package. (See Exhibit 12)

F.O.B Destination - INTERNATIONAL PACKAGES (D.O. 96, 97, and 98):

The international packages for D.O. 96, 97, and 98 are not to be shrink-film wrapped individually. Pack copies in shipping cartons in alphabetical order separated by country with a slip sheet between each country and number cartons 1 of 5, 2 of 5, etc. A completed IRS Carton Shipping Label (Form 6153) must be affixed to the end of each carton (never on the top, sides, or bottom). Deliver via UPS to:

DHL Global Mail #5105988
100 E. Howard
Des Plaines, IL 60018
(847) 227-6100

**** If you are located in the Chicago Area – Please call DHL for pick-up, instead of shipping to DHL.**

Section 7 - Quality Systems

7.1 Quality Systems: The prime contractor shall initiate, prior to start-up and maintain throughout the life of this contract, Quality Systems to assure conformance to all requirements of this contract. The Quality Systems should be documented in a Quality Systems Plan. The plan should also address what actions will be initiated when defects are detected.

The Quality Systems shall assure the quality of components from subcontractors and subsidiary plants. This element includes assuring that components from different sources will be compatible BEFORE the start of production.

The Quality Systems shall include procedures for assuring that all variable data are accurately and completely printed and that all addressed items are mailed. These procedures shall explicitly describe the methods to be used to assure that no records are missed or duplicated when an interruption of variable printing occurs (e.g., due to equipment malfunction).

7.2 Quality Systems Official: The prime contractor shall designate an official who shall monitor and coordinate the quality system. This official shall serve as the Government's single point of contact on quality matters during the life of the contract. The name of the official shall be provided in the plan along with title, position, and telephone number.

7.3 Records: Records of tests, inspections, and critical process controls shall be time stamped and maintained on file. The records must be made available to the GPO and/or IRS inspector until the expiration of the warranty period of this contract. Copies of the forms used to record the inspections and test results shall be submitted with the plan.

All quality control samples must be produced at no additional cost to the Government.

7.4 Inspection by the Government: The right of the Government to make general or specialized tests and inspections does not relieve the contractor of any responsibility.

Performance of all elements and functions of the Quality Systems shall not relieve the contractor of responsibility for meeting all requirements in this contract.

7.5 Quality Systems Plan: The prime contractor shall submit, in duplicate, written outline plans of the Quality Systems and copies of the forms by the date in the schedule in Section 1. The plans shall be submitted to the Contracting Officer, U.S. Government Printing Office, Stop CSAB , Room C-A843, North Capitol & H Sts. NW, Washington, DC 20401, Attn: IRS Desk. The proposed Quality Systems Plans are subject to Government approval. Also, email plans to: Alan.Robertson@IRS.GOV.

7.6 Quality Assurance Levels and Standards: The following levels and standards apply to the products ordered under these specifications:

Product Quality Levels. -

- (a) Printing Attributes -- Level III.
- (b) Finishing Attributes -- Level III.
- (c) Exceptions. - Trim size and margins must be maintained within a 1/16" variation for the forms. Any deviation will be considered a major defect.

Inspection Levels (from ANSI/ASQC Z1.4).-

- (a) Non-destructive Tests - General Inspection Level I.
- (b) Destructive Tests - Special Inspection Level S-2.

Specified Standard. - The specified standards for the attributes requiring them shall be:

Attribute	Specified Standard
P-7. Type Quality and Uniformity	O.K. Press Sheets
P-9. Solid and Screen Tint Color Match	O.K. Press Sheets

Special Instruction: In the event the inspection of the press sheets is waived by the Government, the following alternate standards (in order of precedence) shall become the Specified Standards.

- P-7. Electronic Files.
- P-9. Pantone Matching System.

7.7 Production Samples: The copies included in A, B, and C are considered sample copies and will not be included in the quantity ordered and can not be included in the quantity billed. For package samples use any version return envelope. All package samples should include Insert B.

A. Quality Assurance Samples: 200 live imaged packages, comprised of an equal number of packages from each Service Center, shall be sent at the completion of production to test for compliance against specifications. The contractor must divide the entire order into equal sublots and select one copy from a different general area of each subplot. The contractor will be required to execute "Certificate of Selection of Random Copies", furnished by GPO, certifying that copies were selected as directed.

These randomly selected copies must be packed separately and identified by a special Government-furnished, Pink label, affixed to each affected container. Additional labels, if needed, are to be reproduced on Pink stock. The container and its contents shall be recorded separately on all shipping documents and sent at contractor's expense, by traceable means, to U.S. Government Printing Office, Printing Procurement, Stop: PPSQ, Room A-843, Quality Assurance Section, North Capitol & H Sts. NW, Washington, DC 20401.

A copy of the SPECIFICATIONS and the signed Government-furnished "Certificate of Selection of Random Copies" must be included with the Quality Assurance Random Copies.

B. ENVELOPE SAMPLES: Immediately after the start of envelope production, contractor to ship or mail the following envelope samples, at contractors expense using an overnight delivery service:

5 copies of each package mailer envelope and each business reply envelope to: IRS, Room 6236, Attention: Alan Robertson, SE:W:CAR:MP:P:B:T, 1111 Constitution Ave NW, Washington, DC 20224.

500 copies each of the Cincinnati Service Center business reply envelopes for each package to: US Bank, Cincinnati OH (Austin Service Center 18), 1401 Dalton Avenue, Attn: Kerri Behanan, Cincinnati, OH 45214.

500 copies of the Ogden Service Center business reply envelope to: Bank of America, 2059 Northlake Parkway, Tucker, GA 30084-5399, Attn: David Talford

C. PACKAGE SAMPLES: Ship or mail, by an overnight delivery service at contractor's expense, 200 printed and

imaged (using the furnished "James A and Andrea A Business" scan line information from the prior-to-production samples section), unsealed packages; plus 25 copies of the English and Spanish versions of the SSA/IRS Reporter Pamphlet, within 24 hours of inserting startup to the following destinations:

25 copies each of Packages 1, 2, 3 to: IRS, C5-163, Attention: Doris Bethea, SE:W:CAS:SP:RD:LP, 5000 Ellin Rd., Lanham, MD 20706.

5 copies each of Packages 1, 2, 3 to: IRS, Room 6242, Attention: Betty Howard, SE:W:CAR:MP:P:B:T, 1111 Constitution Ave NW, Washington, DC 20224.

5 copies each of Packages 1, 2, 3 to: IRS, Room 6242, Attention: Pedro Mendez, SE:W:CAR:MP:P:B:T, 1111 Constitution Ave NW, Washington, DC 20224.

15 copies each of Packages 1, 2, 3 to: IRS, Room 6236, Attention: Alan Robertson, SE:W:CAR:MP:P:B:T, 1111 Constitution Ave NW, Washington, DC 20224.

15 copies each of Packages 1, 2, 3 to: IRS, C7-266, Attention: Bob Coar, SE:W:CAR:MP:T:T:SB, 5000 Ellin Rd., Lanham, MD 20706.

10 Copies of Package 1 only to: IRS, C5-186, Attn: Gerry Lords, S:CAS:PBR:SD:E, 5000 Ellin Road, Lanham, MD 20706.

25 Copies of Package 1 only to: IRS, A3-252, Attn: Ramona Henby, M:I:S:SD:SP:DI:SC, 5000 Ellin Road, Lanham, MD 20706.

25 copies of the English and Spanish versions of the SSA/IRS Reporter pamphlet to: John Berger, 283 Rugby Cove Rd., Arnold, MD 21012.

Section 8- OFFERS

Offers must include the cost of all materials and operations for the total quantity ordered in accordance with these specifications.

BILLING ADJUSTMENTS DUE TO SCHEDULED QUANTITY CHANGES (+ or -) AND FOR SUBTRACTION OF UNDELIVERABLES WILL BE AT THE CONTRACTOR'S "ADDITIONAL RATE". Prices for the "ADDITIONAL RATES" must be based on a continuing run, exclusive of all basic or preliminary charges and will not be a factor for determination of award. Bidder MUST submit a price for each line item under the "Additional Rate" Section. If an entry of NC (No Charge) is entered, it shall be held that the bidder intends to furnish those items at no charge to the Government. NA (Not Applicable) should be entered if a line item will not be used.

Mailing cost to the Government will not be used as a factor in determining award.

8.1 Package (1) 941: Printing, folding, and imaging 1,982,343 copies of Item A; printing and folding 1,982,343 copies each of Items B and C; printing and folding 1,982,343 copies of Item D; printing and folding 1,983,731 copies of Item E; printing and manufacturing 1,982,343 copies of Items F and G; inserting Items A thru F into Item G.

Package (2) 941SS: Printing, folding and imaging 7,116 copies of Item A; printing and folding 7,116 copies each of items B, C, D and E; manufacturing and printing 7,116 copies each of Items F and G; inserting Items A thru F into Item G.

Package (3) 941PR: Printing, folding and imaging 43,997 copies of Item A; printing and folding 43,997 copies each of items B, C and D; printing and folding 45,385 copies of Item E; manufacturing and printing 43,997 copies each of Items F and G; inserting Items A thru F into Item G.

Staging and turning over of 2,033,456 total packages to Postal Service for Standard Mail as per specifications

.....\$_____

The bidder must state the administrative cost for preparing and implementing the drop shipment plan included in the total bid price above.

.....\$_____

8.2 Prices for quantity changes

"ADDITIONAL RATE"

(A price must be submitted for each line item)

Printing and folding Form A.....per 1,000..\$_____

Computer imaging Form A.....per 1,000..\$_____

Printing and folding Form B.....per 1,000..\$_____

Printing and folding Form C.....per 1,000..\$_____

Printing and folding instruction.....per 1,000..\$_____

Printing and folding SSA Reporter pamphlet (6-page).....per 1,000..\$_____

Manufacturing and printing mailer envelopes.....per 1,000..\$_____

Manufacturing and printing extended flap return envelopes.....per 1,000..\$_____

Inserting forms, instruction, pamphlet, and return envelope into a mailer envelope.....per 1,000..\$_____

Packing, storing, staging and turnover of packages (including carrier route sorting).....per 1,000..\$_____

Packing for bulk shipments.....per 1,000..\$_____

Passing records through NCOA^{LINK}.....per 1,000 records..\$_____

Initials

The bidder must also furnish the following information:

8.3 Type of addressing equipment that will be used: _____

8.4 Name, address, point of contact, and phone number of all subcontractors, if any, and what function they will perform on this contract:

Envelope Manufacturers: _____

8.5 Post Office for entry of mail packages (Standard Mail):

City State Zip Code

8.6 NCOA^{LINK} full service provider:

Name Address City, State, Zip Code

8.7 **At the same time invoices are submitted to GPO for payment, contractor must email a duplicate copy to alan.robertson@irs.gov.**

Bidder must fill out, sign or initial page 23 and 24 of these specifications and return them attached to the GPO Bid Form 910.

SUBMIT WRITTEN BIDS TO: U.S. Government Printing Office, Bid Section (PPSB), Room C-161, 36 H St. NW, Washington, DC 20404.

FACSIMILE BIDS ARE PERMITTED. Submit facsimile bids to FAX number 202-512-1782, one bid per facsimile. Refer to Solicitation Provisions in GPO Contract Terms (GPO Pub. 310.2), Page 1, Paragraph 6.

Note: With each bid submitted, whether written or facsimile, bidder must provide a duplicate copy.

Name of Firm

Signature of Bidder