

BID INVITATION

U.S. GOVERNMENT PRINTING OFFICE
Atlanta, GA

GENERAL TERMS, CONDITIONS, AND SPECIFICATIONS

For the Procurement of

Composition/Conversion of Forms to Accessible/Fillable Electronic Files

as requisitioned from the U.S. Government Printing Office (GPO) by the

Internal Revenue Service
Atlanta, GA

Multiple Award

The term of this contract is for the period

Beginning Date of Award and ending November 30, 2005

BIDDERS, PLEASE NOTE: These specifications have been extensively revised; therefore, all bidders are cautioned to familiarize themselves with all provisions of these specifications before bidding. Furthermore, no abstract is available that covers the current requirements.

NOTE: DIRECT ALL QUESTIONS OF A TECHNICAL NATURE CONCERNING THESE SPECIFICATIONS TO DEBORAH CHRISTMAS, (404) 605-9160, X9180, OR E-MAIL dchristmas@gpo.gov. REFER ALL OTHER QUESTIONS TO THE CONTRACT ADMINISTRATOR – SUZANNE JONES (404) 605-9160, X9170, OR E-MAIL sjones2@gpo.gov. NO COLLECT CALLS.

BID OPENING: Bids shall be publicly opened at 2 p.m., prevailing Atlanta, GA time, on November 1, 2004.

Bids must be submitted to: Atlanta Regional Printing Procurement Office, 1888 Emery Street NW, Suite 110, Atlanta, GA 30318-2542. *Contractor's complete address, Program Number, and Bid Opening Date and Time should be referenced on the envelope containing the bid.* The following web address will allow you to print a copy of the GPO 910 Form, which is normally found in the back of the specifications:
<http://www.access.gpo.gov/procurement/bids910.pdf>.

DO NOT FAX BIDS TO GPO. See NOTE on page 15 of 29.

SECTION 1. - GENERAL TERMS AND CONDITIONS

GPO CONTRACT TERMS: Any contract which results from this Invitation for Bid will be subject to the applicable provisions, clauses, and supplemental specifications of GPO Contract Terms (GPO Pub. 310.2, effective December 1, 1987 (Rev. 6-01), available on the GPO web-site at http://www.gpo.gov/procurement/ctterms/ct_title.html).

EXTENSION OF CONTRACT TERM: At the request of the Government, the term of any contract resulting from this solicitation may be extended for such period of time as may be mutually agreeable to the GPO and the contractor.

ASSIGNMENT OF JACKETS, PURCHASE AND PRINT ORDERS: A GPO jacket number will be assigned and a purchase order issued to the contractor to cover work performed. The purchase order will be supplemented by an individual "print order" for each job placed with the contractor. The print order, when issued, will indicate the quantity to be produced and any other information pertinent to the particular order.

PREAWARD SURVEY: In order to determine the responsibility of the prime contractor or any subcontractor, the Government reserves the right to conduct an on-site pre-award survey at the contractor's/subcontractor's facility or to require other evidence of technical, production, managerial, financial, and similar abilities to perform, prior to the award of a contract.

PREAWARD EVALUATION: All bidders will be required to submit a sample accessible form in PDF format to demonstrate their ability to deliver accessible forms, the forms to be decided by IRS.

Further, at the Government's option, a pretest may be required to insure that the contractor possesses the ability to create an accessible PDF file using Adobe Forms Access v 1.0 (or higher) from furnished copy with the ability to edit all text matter. Must be a fillable forms file. This test shall take place within 10 workdays of the bid opening.

PAYMENT: Submit all billing to: Comptroller, Stop FMCE, Office of Financial Management, U.S. Government Printing Office, Washington, D.C. 20401. (NOTE: GPO offers a Contractor Fax Billing System. Please, visit <http://winapps.access.gpo.gov/fms/vouchers/barcode> for more information.)

Before any billing will be accepted by the GPO for payment, a photocopy of each page/item ordered must be submitted by the contractor with an itemized statement to IRS, Atlanta Field Publishing, 2970 Brandywine Rd., Suite 201, Chamblee, GA 30341 - Attention of originating Printing Specialist for examination and certification as to correctness of the billings. (Failure to do so may result in nonpayment.)

NOTE: CONTRACTOR BILLING MUST BE ITEMIZED PER THE SCHEDULE OF PRICES – SEE PAGES 13 THROUGH 14.

ORDERING: Items to be furnished under the contract shall be ordered by the issuance of print orders by the Government. Orders may be issued under the contract from Date of Award through November 30, 2005, plus for such additional period(s) as the contract is extended. All print orders issued hereunder are subject to the terms and conditions of the contract. The contract shall control in the event of conflict with any print order. A print order shall be "issued" for purposes of the contract, when it is either deposited in the U.S. Postal Service mail or otherwise furnished to the contractor in conformance with the schedule.

QUANTITIES: This contract is for the items and for the period specified herein. Shipment/delivery of items or performance of work shall be made only as authorized by orders issued in accordance with the clause entitled "Ordering". The quantities of items specified herein are estimates only, and are not purchased hereby. Except as may be otherwise provided in this contract, if the Government's requirements for the items set forth herein do not result in orders in the amounts or quantities described as "estimated", it shall not constitute the basis for an equitable price adjustment under this contract.

Except as otherwise provided in this contract, the Government shall order from the contractor(s) all the items set forth which are required to be purchased by the Government activity identified in the "Ordering" clause.

The Government shall not be required to purchase from the contractor(s), requirements in excess of the limit on total orders under this contract, if any.

Orders issued during the effective period of this contract and not completed within that time shall be completed by the contractor(s) within the time specified in the order, and the rights and obligations of the contractor(s) and the Government respecting those orders shall be governed by the terms of this contract to the same extent as if completed during the effective period of this contract.

If shipment/delivery of any quantity of an item covered by the contract is required by reason of urgency prior to the earliest date that shipment/delivery may be specified under this contract, and if the contractor(s) will not accept an order providing for the accelerated shipment/delivery, the Government may procure this requirement from another source.

The Government may issue orders which provide for shipment/delivery to or performance at multiple destinations.

Subject to any limitations elsewhere in this contract, and pursuant to the section entitled "DETERMINATION OF AWARD AND PLACEMENT OF WORK," the low contractor and each successive low contractor shall furnish to the Government all items set forth herein which are called for by print orders issued in accordance with the "Ordering" clause of this contract, except when the shipping/delivery schedule cannot be met.

REGULATIONS GOVERNING PROCUREMENT

The U.S. Government Printing Office (GPO) is an office in the legislative branch of the United States Government. Accordingly, the Federal Acquisition Regulation is inapplicable to this, and all GPO procurements. However, the text of certain provisions of the Federal Acquisition Regulation as contained in the Code of Federal Regulations (CFR), are referenced in this solicitation. The offeror should note that only those provisions of the Federal Acquisition Regulation which are specifically incorporated by reference into this solicitation, are applicable.

POLLUTION PREVENTION AND RIGHT-TO-KNOW INFORMATION

(a) Federal facilities are required to comply with the provisions of the Emergency Planning and Community Right-to-Know Act of 1986 (EPCRA) (42 U.S.C. 11001-11050) and the Pollution Prevention Act of 1990 (PPA) (42 U.S.C. 13101-13109).

(b) During performance, in whole or in part, of this contract on a Federal facility, the Contractor shall provide to the Contracting Officer all information needed by the Federal facility to comply with the emergency planning reporting requirements of Section 302 of EPCRA, the emergency notice requirements of Section 304 of EPCRA, the list of Material Data Safety Sheets required by Section 311 of EPCRA, the emergency and hazardous chemical inventory forms of Section 312 of EPCRA, and the toxic chemical release inventory of Section 313 of EPCRA, which includes the reduction and recycling information required by Section 6607 of PPA.

SECTION 2. - SPECIFICATIONS

SCOPE: These specifications cover the production of electronic files from manuscript copy and existing electronic files requiring such operations as composition, electronic prepress, proofing, laser copies, and electronic image processing. This includes the conversion of IRS printed forms into fillable OmniForm (OFM) v. 4.0 (or higher) files plus the creation of corresponding electronic files in Adobe Acrobat 5.0 (or higher), as well as fillable Portable Document Format (PDF) (using Adobe Forms Access Tool 1.0), accessible according to the requirements of Section 508 of the Rehabilitation Act, 29 U.S.C. § 794d, as amended. The OmniForm file must be OCR character, ruler, and graphic editable, so as to permit IRS personnel the capability of editing and revising the digital files.

TITLE: Composition/Conversion of Forms to Accessible/Fillable Electronic Files.

FREQUENCY OF ORDERS: Approximately 725 orders during the contract year. Approximately 350 of the orders will be from the Atlanta, GA, area; approximately 150 orders each will be from the Dallas, TX, and Washington, DC, areas; and approximately 50 orders from the Rancho Cordova, CA, area. Anticipate occasional orders will be required from various other IRS offices in the continental United States.

ITEMS TO BE PRODUCED:

All forms delivered through the contract must meet all requirements of Section 508 of the Rehabilitation Act, 29 U.S.C. § 794d, as amended. The following specific requirements supplement and amplify those specific Section 508 requirements.

A form will be considered accessible when it meets the following specific requirements:

- At a minimum, the accessible form will work with all MSAA (Microsoft Active Accessibility) compliant screen reading software such as JAWS 4.5 for Windows and Window Eyes, as well as Dragon Naturally Speaking (though, full compatibility with its speech recognition system is not required). Accessibility by refreshable Braille devices is desirable, but not required.
- Additional enhancements for accessibility such as the ability to change foreground and background colors, or features to output in large print and/or to Braille embossers are also desired but not required.
- The successful vendor must be able to deliver fully accessible versions in PDF of any form requested through the contract.
- All forms must be prepared with specific prompts in each field that are delivered to screen reading software and read automatically to the user by the screen reading software. Example: when the cursor is moved into the “last name” field, the screen reader delivers a prompt to the user that says “enter your last name” or simply, “last name”.
- When a form is opened, the edit cursor should move into the first logical edit field when the user hits the “TAB” key.
- The “TAB ORDER” followed by the edit cursor must be the logical tab order for completion of the form. In most cases this will result in the tab order starting in the first edit field at the top left of the 1st page, then proceeding through each field left to right, top to bottom.
- Accessible/fillable forms must “auto calculate” the result required by any field which is the product of entries of fields previously completed in tab order. Example: if line 20 says “enter the sum of lines 16 through 19”, the form should automatically calculate that sum rather than requiring the disabled user to back up and listen to the entries to manually add them.
- If the IRS requests an accessible version in PDF format, only one file should be delivered containing all the accessibility features.

- All accessible versions of forms and manuals delivered through the contract must be 100% quality checked before delivery.
- All accessible forms delivered through the contract must be 508 certified by recognized testing process; certification must be returned with final files.

The IRS will provide standards to be followed in creating accessible/fillable PDF files, for such items as radio buttons, check boxes, short descriptions, copy designations, field properties, etc. Any standards not initially provided will be determined with guidance from IRS.

Composition: (Approximately 50% of the total orders.) The contractor will be required to set type from furnished manuscript copy as follows:

Text matter - Approximately 30% of the orders for composition, ranging from 1 to approximately 4 pages. (Mostly pamphlets and brochures).

Fillable Forms - Approximately 70% of the orders for composition, ranging from 1 to 8 forms. (See attached exhibits.)

NOTE: Contractor will be required to typeset the entire order. No corrections and/or mends allowed.

Conversion of Products: (Approximately 50% of the total orders.) Convert (via scanning and/or manual recreation) existing IRS forms, manuals and documents; create new forms, manuals and documents; and revise existing forms, manuals and documents into fillable OmniForm digital files which will be capable of reproducing exact printed copies of the originals. The files created must be OCR editable (by character, rule, and graphic elements, as well as font, spacing, and format changes) so that IRS personnel will be able to call up individual files and make author's corrections within the files, as well as font, spacing and other format changes.

Scanning: All scanning shall be done at 100% of the original image size of the documents, with no enlargements or reductions. Any blank pages within the original documents shall be reflected by blank pages embedded within the corresponding document's electronic files. Contractor will not be allowed to charge for embedding blank pages. The page sequence of all PDF files must match those of the corresponding original copy. The font for sans serif type shall be Arial. The font for serif type shall be Times New Roman. All fonts shall be Type I PostScript or Open Type fonts. These fonts must be embedded in the PDF files.

SIZES:

Format "A" – up to and including 5-1/2 x 8-1/2" - approximately 40% of the orders.

Format "B" – over 5-1/2 x 8-1/2" up to and including 8-1/2 x 11" – approximately 48% of the orders.

Format "C" – over 8-1/2 x 11" up to and including 8-1/2 x 14" – approximately 8% of the orders.

Format "D" – over 8-1/2 x 14" up to and including 17 x 11" – approximately 2% of the orders.

Format "E" – over 17 x 11" up to and including 25-1/2" x 11" – approximately 2% of the orders.

(Native files can be as large as 25-1/2 x 11"; however, the PDF files should be formatted as 8-1/2 x 11" pages for posting to the web.)

EXHIBITS: Exhibits A through M are representative of some of the requirements which will be ordered under the contract. However, it cannot be guaranteed that future orders will correspond exactly to these exhibits.

GOVERNMENT TO FURNISH: One or more of the following:

Manuscript copy will be furnished to the contractor in various forms, including single- and double-spaced typewritten copy, and handwritten copy.

Department seals and illustrations.

Printed copy with corrections, changes, additions, and/or deletions indicated.

Electronic Media:

Platform: Windows 98 & 2000, Windows NT, Windows XP

Storage Media: Floppy disk (3.5"), CD-ROM (up to 700 MB, 80 minutes), and digital files sent via e-mail and FTP.

Software: Microsoft Office Suite, Adobe Acrobat 5.0 (or higher).

Note: All software upgrades (for specified applications and/or operating systems) which may occur during the term of the contract, must be supported by the contractor.

GPO Form 952 (Desktop Publishing - Disk Information) will be provided with all electronic files.

A visual of the furnished electronic files may or may not be furnished.

Print orders.

Facsimile, Form 6153 – IRS Carton Label, with labeling and marking specifications for shipping containers.

Performance Records: A *Facsimile Transmission Sheet* will be furnished to the contractor. Information such as the GPO program, jacket, and print-order numbers, quantity, and date of shipment must be filled in by the contractor and faxed/mailed to the GPO on the day shipment is due.

CONTRACTOR TO FURNISH: All materials and operations, other than those listed under "Government to Furnish," necessary to produce the product(s) in accordance with these specifications.

On all of the Composition orders, the contractor shall deliver electronic files in two formats: 1) PDF (Portable Document Format) using Adobe Forms Access Tool 1.0 or higher with the ability to edit all text matter and accessible in compliance with Section 508 of the Rehabilitation Act (1998), 29 U.S.C. § 794d, as amended, and 2) an OMNIFORM v4.0 or higher native application format. Files shall be delivered on CD-ROM. OMNIFORM files should only contain the image area of the product being designed. Adobe Acrobat files must have crop marks in place. All other miscellaneous marks (color bars, specification bars, gray scales, slug lines, cross hairs, etc) must be removed. The PDF files shall be fillable forms files.

The Section 508 accessible PDF files shall/must support an MSAA (Microsoft Active Accessibility) approved screen reader such as JAWS 4.5 or higher, and Windows Eyes.

COMPOSITION: The entirety of each category of composition (text, tabular, and display) must be identical throughout the product(s) ordered under these specifications.

Laser prints will be produced at a minimum of 600 dpi.

Forms composition for the purpose of the contract will be defined as matter set in all sizes which includes type matter; vertical, horizontal, and diagonal rules; box heads, numbered lines, check boxes, arrows, etc., and screened areas. All elements shall be accurately positioned in their proper location to provide spaces for hand or typewritten information to be filled in. Each component of the form shall be composited into a single image unit.

Type Page Size: Sizes will vary for different products from approximately 20 x 28 picas to approximately 45 x 60 picas; however, other type page sizes may be ordered occasionally.

Approximately 15% of the total orders will be for forms, text, etc., in Spanish. Contractors must have the capability to typeset any special characters for the Spanish language. There will be no additional charge allowed for composition or conversion of Spanish documents.

Makeup: Assemble all elements of composition, allow space for illustrations, and space out to page depth. Unless otherwise specified, space for illustrations should be inserted as near as possible to their reference, with 6 to 12 points of space between illustration and legend/caption (if applicable) and 12 to 18 points of space between text and illustration and/or legend/caption.

Line spacing requirements must be strictly adhered to by the contractor.

Typefaces and Sizes: Standard 35 Adobe Type 1 Postscript and Open Type Fonts. See Attachment 1.

The typeface or typefaces to be used will be indicated on the individual print order. Fonts must be embedded within the PDF files.

Payment for text matter from furnished manuscript will be made on a per page rate as listed in the "Schedule of Prices."

AUTHOR'S ALTERATIONS: Author's alterations consist of all marks made by the author at variances with the original manuscript as submitted to the contractor, but do not include corrections marked by the editor due to the failure of the contractor to follow copy literally.

Author's alterations will be measured and paid for in the same manner as Miscellaneous Typelines.

No time-work charges will be allowed.

PROOFS:

Occasional composition orders may require up to two sets of page proofs (at the Government's option contractor may FAX or e-mail the proofs to agency).

Proofs on conversion orders will be submitted as electronic files of the finished form and will be required on all orders.

The contractor will be responsible for performing all necessary proofreading to insure that the composition is in conformity with the copy submitted.

If any contractor's errors are serious enough in the opinion of the GPO to require revised proofs, these proofs are to be provided at no expense to the Government. No extra time can be allowed for this reproofing; such operations must be accomplished within the original production schedule allotted in the specifications.

Rejections and Corrections: Any material rejected by the Government must be picked up by the contractor immediately upon notification for correction.

Black and white laser copy must be on a good quality laser paper, Hammermill Color Copy paper or equal (96 white).

Electronic proofs must be identified by the file naming conventions and document information as detailed under FILE NAMING CONVENTIONS, on page 8.

PDF proofs must be Press Quality and will be required on all orders.

DELIVERABLES: Upon completion of each conversion order, the contractor must furnish to the Government all fillable OFM and accessible/fillable, press-quality PDF files on CD-ROM, plus corresponding hard copy printouts in each format requested, and Section 508 testing certification.

HARD COPY PRINTOUTS: Each final OmniForm file and corresponding PDF file must have a laser printed hard copy printout submitted along with the disk on which the files exist. Each printout shall be identified as OmniForm or PDF source. All printouts shall be produced on a laser printer with a minimum resolution of 600 dots per inch (DPI), on white paper in sizes matching the intended output of the files and at 100% with crop marks in place. The paper copy should not be less than 8-1/2 x 11”.

FILE NAMING CONVENTIONS: The file names of all OFM digital files and PDF files shall be consistent with the following convention: 8 digit file name, 3 digit extension:

OmniForm Source File Example: the file name for Form 1767 (Rev. 6-96) = 61490F96.OFM

PDF Example: the file name for Form 1767 (Rev. 6-96) = 61490F96.PDF

The first 5 digits of the file name = IRS “Catalog Number” of product. (The catalog number and issue/revision date will be provided to the contractor with each print order.)

6th digit is an alpha character corresponding to the “month” of the product’s revision date. Alpha characters are defined as follows:

A = January	G = July
B = February	H = August
C = March	I = September
D = April	J = October
E = May	K = November
F = June	L = December

And Y = Year or Tax Year (for products that have a “Tax Year” associated with them).

7th and 8th digits = last two digits of the year of the product’s revision date.

3-digit extension = OFM or PDF.

All PDF files shall have 2 of 4 document information fields completed as follows:

TITLE: Product identification and revision/issue date. The title “Product Identification” shall be pulled verbatim from the original document being scanned.

Example: Form 2290 (Rev. 09-95) or Form 10235 (1-97).

SUBJECT: Long Title. The “Long Title” shall also be pulled verbatim from the original document being scanned.

Example: Heavy Vehicle Use Tax Return.

AUTHOR: Blank.

KEYWORD: Blank.

OMNIFORM VERSION 4.0 PROGRAM PARAMETERS: Document properties must include Form No., Revision Date, Title, and indicate that the file is “fillable”.

Form Margins: No forms shall have less than 3/8” margins. For forms that have margins greater than 3/8”, follow the margins on the existing form.

Grid: Grid must be set off.

Attributes for “Text blocks” and “Fill text blocks” for all forms: “Text blocks” = Stand alone text such as headings. “Fill text blocks” = Text that is surrounded on three or more sides by rules.

OBJECT APPEARANCE WINDOW:

Background

Color	White
Pattern	None
Pattern Color	Black
Clear	Should be checked.

Border

Color	Black
Style	Unbroken line.
Weight	see below.

Top and Bottom Rules on each page should be 2pt.
All other rules will be ½ pt.

Clear	Not checked
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Shadow

Location	None
Offset	Hairline

Fill Line

Color	Black
Style	Unbroken line
Weight	½ pt.
Clear	Should be checked.

Start Fill line at first indentation – should be blank.

Visible Display Always

OBJECT DEFINITION WINDOW: OmniForm defined values are acceptable.

SIZE AND POSITION WINDOW: No requirements – will equal size and position of item selected.

FONT WINDOW: Font size must be actual and in whole numbers (no decimals) point sizes (i.e., 8pt. or 9pt. Not 8.3pt.)

TEXT WINDOW:

Alignment	Horizontal = LEFT Vertical = Top (for text blocks).
Alignment	Horizontal = LEFT Vertical = Bottom (for fill text blocks).
Spacing	Single
Margins	All are equal to 0.015 (top, bottom, left, right).
Text Flow	Text must flow across lines.

PACKING: All art must be packed suitable in order to guarantee safe delivery to destination. Assemble in proper sequence and slip-sheet before wrapping. Boards must be packed flat. Disks must be packaged or cartoned flat in suitable containers so as to prevent any damage to product during transit.

LABELING AND MARKING: Reproduce shipping labels from furnished repros (IRS Form 6153), fill in appropriate blanks and attach affix one label to each shipping container according to instructions at the top of the base label sheet. Failure to use IRS label or to follow packing instructions may be cause for refusal, or repacking on site at contractor's expense.

DISTRIBUTION: Deliver f.o.b. contractor's city, utilizing the small courier service/account number indicated on the print order, to the following areas in the Continental United States: Atlanta, GA; Dallas, TX; Washington, DC; Rancho Cordova, CA. Complete addresses will be furnished with the print orders.

All shipments must be shipped via the IRS Small Package Ground Service Carrier Account Number established for this purpose. **The contractor must NOT use his/her own small package carrier account. Contractor will NOT be reimbursed any shipping charges.**

NOTE: Contractor is cautioned that the courier service/account number is for use under these specifications only.

Upon completion of each order, all Government furnished material and a photocopy of the airbill must be returned to the address indicated on the print order.

All expenses incidental to the pickup and return of furnished materials from and submitting proofs must be borne by the contractor.

SCHEDULE: Adherence to this schedule must be maintained. Contractor must not start production of any job prior to receipt of the individual print order (GPO Form 2511).

No definite schedule for pickup of material can be predetermined. The contractor will be notified by the Government when furnished materials and print order are available for pickup or ready to FAX or e-mail (Government's option).

Furnished materials must be picked up from (unless Faxed or e-mailed) and delivered to one of the following areas: Atlanta, GA; Dallas, TX; Washington, DC; Rancho Cordova, CA. Complete addresses will be given at time of award of the contract. (The majority of the jobs will originate from the Atlanta, GA, area.)

The following schedules begin the same day as notification of availability of each individual print order and furnished material if notified by 2 p.m. in the prevailing time of the city where the Government furnished materials are to be picked up. When notification of availability is given after 2 p.m. the date of notification shall be 9:00 a.m. the following day.

Composition Orders:

Proofs: Proofs, when requested, due within 3 to 5 workdays for orders with 8 pages or fewer, and within 5 to 15 workdays, as indicated on print order, for orders more than 8 pages. The Government will give "OK" within 5 workdays for PDF files. Complete production and delivery must be made within 1 to 3 workdays after receipt of an "OK".

Conversion Orders:

Electronic proofs must be submitted via e-mail. E-mail addresses will be furnished on the print order. Include name of subscriber on E-mail subject line.

Submit proofs within 3 - 5 workdays after notification of availability of furnished material and print order.

Proofs will be withheld up to 5 workdays from receipt by the Government until proofs are e-mailed back to the contractor. The first workday after receipt of proofs by the Government is day one of the hold time.

Simple corrections to proofs will be transmitted electronically. For extensive corrections a hard copy will be provided.

If revised proofs are required due to author's alterations, they must be e-mailed within 2 workdays after receipt of e-mailed first set of electronic proofs.

Revised proofs will be withheld 3 workdays from receipt by the Government until proofs are e-mailed back to the contractor and an "OK to Proceed" is given.

Ship disks and hard copy within 3 workdays after receipt of an "OK to Proceed" is given. The first workday after receipt of "OK to Proceed" is given, is day one.

The ship/deliver date indicated on the print order is the date products ordered must be delivered to the destination specified.

Unscheduled material such as shipping instructions, delivery lists, labels, etc., will be furnished with each order or shortly thereafter. In the event such information is not received in due time, the contractor will not be relieved of any responsibility in meeting the shipping schedule because of failure to request such information.

SECTION 3. - DETERMINATION OF AWARD AND PLACEMENT OF WORK

The Government will make multiple awards under this solicitation since it is anticipated that one firm may not be able to meet all of the requirements.

Each order will be individually abstracted to determine the lowest bid.

In placing work, the Government will first communicate with the low contractor to determine whether or not at that time one or more orders for specified quantities can be accepted for shipment within the time required by the Government. The Government will be obligated to place each order with the low contractor first, the next low contractor second, and so on until the order has been accepted. Placement of orders shall be made only to those contractors whose prices are determined to be fair and reasonable. The low contractor and each successive next low contractor shall be obligated to accept the order except when the shipping schedule cannot be met. Contractors refusing to accept orders with the requested ship date shall be required to provide the best date that can be met. When the contractor accepts, a formal print order will be issued.

Due to the urgency of the work, orders will be placed by telephone and the contractor must reply within 2 hours (maximum) whether or not the order can be accepted.

Any contractor's position in the sequence of awards may be jeopardized by consistently refusing work of one type and accepting work of another. When such an instance is found, the contractor involved will be notified and unless prompt adjustment in order acceptance is made to maintain the lowest cost to the Government, the contractor may be disqualified from further participation under this contract.

Exception: Noncompliance with the shipping and/or delivery schedule, or any other term, condition, or specification of this contract will be cause, and the GPO reserves the right, to withhold further orders until the contractor is judged by the Government to have established adequate procedures to fulfill the requirements.

SECTION 4. - SCHEDULE OF PRICES

Bids offered are f.o.b. contractor’s city.

Bids for each item listed in its respective format group, as defined in Section 2.- Specifications, must include the cost of all required materials and operations in accordance with these specifications.

Bidder must make an entry in each of the spaces provided. Bids submitted with any obliteration, revision, or alteration of the order and manner of submitting bids, may be declared nonresponsive.

An entry of NC (No Charge) shall be entered if bidder intends to furnish individual items at no charge to the Government.

An entry of NB (No Bid) must be entered if bidder does not intend to furnish certain items.

Bids submitted with blank spaces for the individual items will be considered as an entry of NB for that particular item.

The Contracting Officer reserves the right to reject any offer that contains prices for individual items of production (whether or not such items are included in the Determination of Award) that are inconsistent or unrealistic in regard to other prices in the same offer or to GPO prices for the same operation if such action would be in the best interest of the Government.

All billing submitted to the GPO shall be based on the most economical method of production.

The contractor is cautioned not to perform any operation(s) or produce any product(s) for which a price has not been offered under the contract. Further, the contractor is not to accept print orders which are outside the scope of the contract. Any changes made to the print order MUST be confirmed in writing by the Contracting Officer, Atlanta GPO. If such orders are placed by the agency, and no Modification is received from the Atlanta GPO, the contractor is to notify GPO Atlanta immediately. Failure to do so may result in nonpayment.

I. COMPOSITION: (Includes the price of CD and proofs.)

	Format “A”	Format “B”	Format “C”	Format “D”
(a) Keyboarding from manuscript copy or scanning from previously printed copy, text matter only: per page	\$ _____	\$ _____	\$ _____	\$ _____
(b) Forms, including the costs of typesetting and makeup: per page	\$ _____	\$ _____	\$ _____	\$ _____
(c) Author’s Alterations*/Miscellaneous typelinesper line	\$ _____			

*Contractor will be allowed charge under (c) **ONLY** when AAs are indicated on the initial proofs submitted, and this information **MUST** accompany billing in order for the contractor to receive payment.

(Return in triplicate) _____
(Initials)

II. CONVERSION OF FORMS TO FILLABLE OMNIFORM FILES AND ACCESSIBLE/FILLABLE PDF FILES: The prices offered shall be all-inclusive for producing electronic file forms in accordance with the terms of these specifications (including proofs).

	Format "A"	Format "B"	Format "C"	Format "D"
(a) Conversion of scanned form to fillable OmniForm and accessible/fillable PDF files per page	\$ _____	\$ _____	\$ _____	\$ _____
(b) Conversion of unfillable PDF form to fillable OmniForm and accessible/fillable PDF files per page	\$ _____	\$ _____	\$ _____	\$ _____
(c) Revisions to existing electronic files per line.....	\$ _____			

Price offered under Item II(c) is all inclusive for setting typelines, assembling typelines and making mends in accordance with these specifications, as required by the Government. Additional charges to correct contractor's errors are NOT allowed.

TYPEFACES: If alternate typefaces are proposed, the bidder must list on the line of the same number as the preferred typeface, the name of the alternate typeface and composing machine to be used.

Preferred Typefaces:

- Standard 35 Adobe Type 1 Postscript or Open Type Fonts (See Attachment 1)

Alternate Typeface	Name of Composing Machine
1. _____	_____
2. _____	_____

 (Initials)

(Return in triplicate)

BIDDER'S NAME AND SIGNATURE: Fill out and return three copies of all pages in "Section 4.- Schedule of Prices" relating to the category or categories for which bids are submitted, initial or sign each in the space provided and submit with the original and duplicate copies (parts 1 and 2) of GPO Form 910, "Bid." Do not enter bid prices on GPO Form 910. NOTE: The schedule of prices will prevail in instances where prices are inadvertently entered on GPO Form 910.

Bidder _____

(City - State)

By _____

(Signature and title of person authorized to sign this bid)

(Person to be contacted)

(Telephone Number)

NOTE: For the purpose of this solicitation, facsimile bids that are transmitted to and have been received by a commercial enterprise and subsequently delivered to the Government will be considered. Facsimile bids transmitted to GPO offices will NOT be considered.

(Return in triplicate)

ATTACHMENT 1

Standard 35 Adobe Type 1 PostScript Fonts

ITC Avant Garde® Book
ITC Avant Garde Demi
ITC Avant Garde Book Oblique
ITC Avant Garde Demi Oblique

ITC Bookman® Light
ITC Bookman Demi
ITC Bookman Light Italic
ITC Bookman Demi Italic

Courier
Courier Bold
Courier Oblique
Courier Bold Oblique

Helvetica*
Helvetica Bold
Helvetica Oblique
Helvetica Bold Oblique

Helvetica Narrow
Helvetica Narrow Bold
Helvetica Narrow Oblique
Helvetica Narrow Bold Oblique

New Century Schoolbook Roman
New Century Schoolbook Bold
New Century Schoolbook Italic
New Century Schoolbook Bold Italic

Palatino* Roman
Palatino Bold
Palatino Italic
Palatino Bold Italic

Symbol

Times* Roman
Times Bold
Times Italic
Times Bold Italic

ITC Zapf Chancery® Medium Italic

ITC Zapf Dingbats®

ABCDEFabcdef1234!#%&
ABCDEFabcdef1234!#%&
ABCDEFabcdef1234!#%&
ABCDEFabcdef1234!#%&

ABXΔEΦαβγδεφ1234!#%&

ABCDEFabcdef1234!#%&
ABCDEFabcdef1234!#%&
ABCDEFabcdef1234!#%&
ABCDEFabcdef1234!#%&

ABCDEFabcdef1234!#%&



EXHIBIT "A"

Estate Tax Classification Check Sheet (Selected Returns)		Estate of/Donor
		Date Filed
		Type of Audit---
		<input type="checkbox"/> Field <input type="checkbox"/> Correspondence <input type="checkbox"/> Under 300,000 <input type="checkbox"/> Office <input type="checkbox"/> Single Item <input type="checkbox"/> Over 300,000
Reason(s) for Selection-----(X)-----		Remarks and/or Item Number
Gross Estate	SCHEDULE	
	A -- Real Estate	
	B -- Stocks and Bonds	
	C -- Mortgages, Notes, and Cash	
	D -- Insurance	
	E -- Jointly Owned Property	
	F -- Other Miscellaneous Property	
	G -- Transfers During Decedent's Life	
	H -- Powers of Appointment	
Deductions	I -- Annuities	
	J -- Funeral and Misc. Administrative Expenses	
	K -- Debts, Mortgages and Liens	
	L -- Net Losses During Administration	
	M -- Bequests to Surviving Spouse	
	N -- Orphan's Deduction	
Other	O -- Charitable Bequests	
	P -- Credit for Foreign Death Taxes	
	Q -- Credit for Tax on Prior Transfers	
	Recapitulation	
	Taxable Estate---Resident	
	Taxable Estate---Non-Resident	
Computation of Tax	Gross Tax	
	Credit for State Death Taxes	
	Credit for Federal Gift Taxes	
	Credit for Tax on Prior Transfers	
	Credit for Foreign Death Taxes	
	Other	

INSTRUCTIONS TO VALUATION CLERK

- Valuation not Needed
- Verify Listed Stocks and Bonds
 - Date of Death
 - Alternate Date

ESTIMATED TAX DEFICIENCY

- Over \$10,000 "A"
- \$5,000 to \$10,000 "B"
- Under \$5,000 "C"
- REFUND

Exhibit "B"

EXHIBIT "B"	
Applicant's Branch	Date sent to Branch
Employee's Name	Date due in Personnel
Vacancy Anno. No.	Title
Series	Branch
Grade	

Instructions:

The above named employee has been rated eligible for this position. The type of evaluation required is shown below.
Form 6477 and 6477-A: The latest evaluation will always be used, if it accurately reflects current performance.
Form 6568: May be used for one (1) year and the applicant should be rated in item E for the position for which application is made.
Form 6850A: The employee's last annual rating may be used, but only if the rating accurately reflects current level of performance. Ratings more than six months old must be reevaluated. For measured employees, see date of TEPS report to be used below.

Fill in "Date of Evaluation to be Used", attach copy, and return to Personnel Branch by the date shown above. Notify the employee of impending use of the evaluation for this vacancy announcement.

Type of Evaluation Requested	<input type="checkbox"/> 6477 and 6477-A	<input type="checkbox"/> 6568	<input type="checkbox"/> 6850-A - For measured employees use TEPS evaluation report ending _____	<input type="checkbox"/> Other
Date of Evaluation to be Used				

Form 11197 (2-98)
 Prev. issued as MSC Form RM-32
 Catalog Number 25-560X
 Department of the Treasury - Internal Revenue Service

Evaluation Data Request

Exhibit "C"

EXHIBIT "C"

FIELD ASSISTANCE ACTIVITY REPORT

1. Qualify Reviewed By: _____ 2. Four Digit Document Number _____ 3. Generated Block Number _____

4. Employee Name: _____

5. Territory Name _____ 6. POD Name _____

7. Office Designation Number _____ Territory _____ Group _____ POD _____

8. Week Ending Date _____

Year: 2 0 0 0 Month: _____ Day: _____

9. Type of Employee (check one)

<p>01. Perm. CSR</p> <p>02. Perm. TRR</p> <p>03. Perm. TSR</p> <p>04. Perm. TSS</p> <p>05. Perm. Senior TRR</p> <p>06. Perm. Tax Law Spec.</p>	<p>07. Other TRR/Senior TRR</p> <p>08. Other TRR/Senior TRR</p> <p>09. Other CSR/TSR/TSS/TLS</p> <p>10. Perm. Senior TRR</p> <p>11. Perm. FA Manager</p>
--	--

12. Perm. Program/Policy Analyst

13. Perm. PT Management

14. Other Management

15. Perm. Management Assistant

16. Perm. IAR

17. Perm. FA Clerical

18. Perm. PT FA Clerical

19. Perm. Scheduler/Receptionist

20. Other FA Clerical

21. SREC

22. Other Wait Employee

23. TEC

24. Other Revenue Agent

25. Other SB/SE Exam Type

26. Other SB/SE Revenue Officer

27. Other SB/SE Collection Type

28. Other SB/SE

29. Other Employee

Field Assistance Activity Name	Alpha Code	Week							Wk. Cum.	
		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday		
Activity Code		Units	Hours	Minutes	Units	Hours	Minutes	Units	Hours	Minutes
Customer Incoming Telephone Calls	01									
Customers w/Form Contact	02									
Electronic Return Preparation	03									
Non-Electronic Return Preparation	04									
Tax Law Questions	05									
Account Work/Notices	06									

Valid Alpha Codes: F = Employee Effie
D = Disaster Assistance
R = Advance Payments
E = Extended Hours

Shaded Alpha Code Box Represents Normal (No Alpha Code) Activity.

Week Cumulative	
a. Direct Totals (pages 1 and 2)	Units
b. Overhead Totals	Hrs. Min
c. Direct and Overhead Total	
d. Total Memo Count from Page 4	
e. Grand Total to be shown on RMIS screen	

Total Employee Hours (line c on the left + total comp/credit taken on page 4): _____

Hrs. Min

Department of the Treasury - Internal Revenue Service
Catalog Number 238252
Form 5311 (Rev. 1-2004)

Exhibit "D"

EXHIBIT "D"

Quality Review Control Sheet

NAME _____	QUALITY REVIEW _____
EMPLOYEE# _____	REL W/O REVIEW _____
FUNCTION _____	SAMPLE \$ELECTED _____ (Enter Volume)
PROGRAM _____	DATE SELECTED _____
VOLUME _____	DATE RETURNED _____
DATE _____	NUMBER OF ERRORS _____

Form **10059** (9-96)
Prev. Issued as 599-0-191 (Reinst. 9-87)
Catalog Number 2293ST
Department of the Treasury - Internal Revenue Service

EXHIBIT "E"

ESU Classification Checklist

Type: TEFRA _____ NON-TEFRA _____ DATE _____

TIN _____ PERIOD _____ NAME _____
 (use label)

AIMS	YR	YR	YR	YR
_____ Establish File on AIMS	_____	_____	_____	_____
_____ Update Statute To	_____	_____	_____	_____
_____ Update Source Code To	_____	_____	_____	_____
_____ Update Status/Org To	_____	_____	_____	_____
_____ Request Return(s)				
mft period DLN				
mft period DLN				
_____ Order TXMOD/IMFOL	_____	_____	_____	_____
_____ Order AMDIS SUMRY	_____	_____	_____	_____
_____ Order AMDISA (all pages) for	_____	_____	_____	_____
_____ Order TSINQ For	_____	_____	_____	_____
_____ Order TSUMY For	_____	_____	_____	_____
_____ Put Case in _____ Folder	_____	_____	_____	_____
_____ Put _____ Tape on Folder	_____	_____	_____	_____
_____ Request K-1 For _____				
_____ Prepare Loss Letter (signature required) for _____				
_____ TIER-Set up Admin. file and establish controls _____				
_____ Linkage Missing For _____				
_____ Send File To _____				
_____ Other: _____				
_____ Classifier _____				

EXHIBIT "F"

Reference Sheet

When submitting the application packet, you must list (3) character references.

Reference 1

Name		Address	
City	State	Zip Code	Telephone Number (incl. area code)

Reference 2

Name		Address	
City	State	Zip Code	Telephone Number (incl. area code)

Reference 3

Name		Address	
City	State	Zip Code	Telephone Number (incl. area code)

Signature	Date	Social Security Number
-----------	------	------------------------

Privacy Act of 1974 (Public Law 93-579)

The information requested on this form will be used to update personnel records. Your social security number is only used as identifier (authorized under Executive Order 9397, dated November 1943).

You are not required to supply the information requested on this administration form. If you furnish none of the information, any required processing of the form will be suspended, and your personnel record will receive no further processing. If you furnish only part of the information required, the processing your personnel records will be attempted; however, it may be significantly delayed. If the information withheld is found to be essential to processing your records properly, you will be informed, and no further processing will occur unless you supply the missing information.

EXHIBIT "G"



Department of the Treasury
Internal Revenue Service

Aviso 1037
(Rev. Diciembre 2001)

**Solicitandó Información Omitida Sobre el
Crédito por Ingreso del Trabajo.**

Le estamos devolviendo su declaración de impuestos porque necesitamos que envíe más información sobre su Crédito por ingreso del Trabajo (Earned Income Credit (EIC)). Cuando nos conteste, favor de incluir éste aviso con su declaración de impuesto.

- Por favor llene el Anexo EIC (Schedule EIC) que ha sido incluido.
- Por favor envíenos la información completa para cada niño que califica:
- Nombre completo de cada niño.
 - Año de nacimiento de cada niño.
 - Número de Seguro Social de cada niño.
 - Relación de cada niño con usted.
 - Número de meses que cada niño vivió con usted durante en año tributario.
- Por favor explique el tipo de ingreso que usó para computar el Crédito por Ingreso del Trabajo (Earned Income Credit), y adjunte su(s) documento(s), (Formas W-2 o 1099-MISC) para justificar su anotación.

Si tiene preguntas con respecto
a este Aviso, por favor llame
al 1(800)829-1040

***Please see reverse side for instructions
in English.***

EXHIBIT "H"



Department of the Treasury
Internal Revenue Service

Notice 1088
(Rev. December 2001)

**Request for Missing Information on a
Decedent Return**

We are returning the enclosed tax return because we need more information to process it. See the box(es) checked on both sides of this notice. Please send us any documents requested with the completed tax return and this notice.

- Write the **date of death** for the deceased taxpayer across the top of Form 1040, 1040A or 1040EZ.
- You may file a **joint tax return** (filing status 2) and claim an exemption for your spouse if your spouse died during the tax year and you didn't remarry during the tax year. Please provide your spouse's name and social security number (SSN) or individual taxpayer identification number (ITIN) on your return. If you have a dependent child or children, you may claim qualifying widow(er) status (filing status 5) for the two tax years following your spouse's death.
- A return for a **deceased taxpayer must be signed** by the taxpayer's spouse or a representative of the estate—an executor, administrator, or anyone who is in charge of the decedent's property. Please have the appropriate person sign his/her name in the space on the return that is for the taxpayer's signature.
- A **power of attorney** is invalid after the death of a taxpayer. If you are signing the return for the surviving spouse, attach the power of attorney showing your appointment as the personal representative of the surviving spouse. Otherwise, the surviving spouse must sign the return.
- We can't determine who is **claiming the refund** for the deceased taxpayer(s). Please print the name clearly in the signature area.

(over)

Catalog Number 25016A

EXHIBIT "I"

Privacy Protection of Electronic Return Processing

Your tax return will be electronically processed and transmitted to the IRS by a commercial provider.

The security and privacy protection of your return meets the commercial provider's security standards.



Department of the Treasury
Internal Revenue Service

Notice 1317 (01-2003)
Catalog Number 35553E

EXHIBIT "J"

Special Instructions for Visually Impaired

**IRS Telephone
Customer Satisfaction Survey**

Post these instructions for quick access when you hear the notification "beeps" from the Survey Administrator.

The Survey Administrator will "beep" you to indicate your call has been selected to participate in the IRS Customer Satisfaction Survey. The "beeps" will come as you are finishing your response to the taxpayer. You will hear one beep, a short pause, and a second beep. These TWO beeps let you know that the call was selected. Complete your response and address all issues. Once you have completed the call, read the following script EXACTLY AS PRINTED. NOTE: Do not try to contact the Survey Administrator until you have read the script.

"This call has been randomly selected to participate in a brief survey regarding the service you received today. Your answers will help improve the service taxpayers receive when they call the IRS. The survey will take a few minutes. May I transfer you to a SURVEY ADMINISTRATOR?"

If the taxpayer says "NO", thank the caller and end the contact.

If the taxpayer says, "YES", following these procedures for transferring the call:

1. Press "INSIDE LINE". (NOTE: DO NOT press the "HOLD" key. INSIDE LINE automatically places caller on hold.)
2. Dial the 4 – digit 9130. (Do not use the # key)
3. Press "ENTER" to connect to the SURVEY ADMINISTRATOR.
4. Wait for the SURVEY ADMINISTRATOR to answer and advise you to transfer the call. The caller is still on hold and cannot hear you.
5. The SURVEY ADMINISTRATOR will ask the CSRs the ISSUE and RESOLUTION.

When instructed, press, "TRANSFER" to release the caller to the Survey Administrator.

THIS MUST REMAIN POSTED IN YOUR CUBICLE AT ALL TIMES
Program Analysis Staff (PAS)



EXHIBIT "K"

Basis of Stocks and Bonds

Publication 550, Investment Income and Expenses

BASIS

Basis is the amount of your investment in property for tax purposes. It is used to figure your gain or loss on the sale or other disposition of the property.

Purchased stocks and bonds — Your basis is usually what you paid for the stock or bond (cost basis).

- See page 39, "Cost Basis"

Exception. Certain situations require you to use a basis other than cost.

- See page 39, "Basis Other Than Cost."
- See page 39, "Property Received for Services."
- See pages 40–41, "Stocks and Bonds."

Stocks and bonds received as gifts — Your basis is usually the donor's adjusted basis at the time of the gift.

- See page 40, "Property Received as a Gift."
- See page 40, "Fair market value less than donor's adjusted basis."
- See page 40, "Fair market value equal to or more than donor's adjusted basis."

Refer if the donor paid gift tax or the gift was received before 1977.

Inherited stocks and bonds — Your basis is usually the fair market value of the stock or bond on the date of the decedent's death.

- See page 40, "Property Received as Inheritance."

Note: Publication 551, page 9, contains additional information regarding the following topics:

- Inherited Property
- Community Property
- Property Held by Surviving Tenant
- Qualified Joint Interest

ADJUSTED BASIS

You may have to adjust (increase or decrease) your basis as the result of certain events that occurred after you acquired the stock or bond.

- See pages 19-20, "Nontaxable Distributions."
- See page 20, "Basis adjustment."
- See pages 20-21, "Fractional shares."
- See page 41, "Stock splits" and "Stock dividends."
- See Form 1099-DIV, see: Instructions for Recipient, Box 3

IDENTIFY STOCKS AND BONDS SOLD

To figure your capital gain or loss, you must identify which shares of stock (or which bonds) were sold and determine their basis.

- See page 40, "Stocks and Bonds."
- See pages 40-41, "Identifying stock or bonds sold."
- See page 41, "Adequate identification"



IRS

Department of the Treasury
Internal Revenue Service

Document 11992 (1-2003)
Catalog 35605V

EXHIBIT "L"

2001 THE EITC

You've earned it.
Why not claim it?

You may qualify for
the Earned Income Tax Credit
on your 2001 tax return

- ✓ IF you earned under \$32,121 and have more than one qualifying child
- ✓ IF you earned under \$28,281 and have one qualifying child
- ✓ IF you earned under \$10,710 and have no qualifying child

EXHIBIT "M"

Eighteen million people already benefit from the EITC. Yet some people who are eligible don't know it exists — how to qualify — or how to claim it.

Do you qualify?

Call 1-800-829-3676 for the free IRS Publication 596, *Earned Income Credit* — and find out. This publication can also be downloaded from the Internet at the IRS Web site: **www.irs.gov**



Department of the Treasury
Internal Revenue Service

www.irs.gov

Publication 902A (10-2001)
Catalog Number 331235