

Jacket: 623-506
Title: Instructions for Forms 1040 (and 1040-SR) (2024 rev) (DS); Cat# 24811V
Agency: IRS
Bid Opening: November 18, 2024 at 11:00AM

Contractor Name	Bid	Terms		Discounted Total
Alcom Printing AWARDED	\$373,815.32	3.0%	20 days	\$362,600.86
Signature Graphics	\$413,969.56	5.0%	20 days	\$393,271.08
NPC, Inc	\$425,254.00	0.25%	20 days	\$424,190.87
ACR III LSC Holdings LLC	\$430,867.00		days	\$430,867.00
Advantage Mailing	\$455,388.47	0.25%	20 days	\$454,250.00
Marcus J Graphic Design LLC	\$5,558,635.40		days	\$5,558,635.40

BID OPENING: Bids shall be opened virtually at 11:00 AM, Eastern Time (ET), on November 18, 2024 at the U.S. Government Publishing Office. All parties interested in attending the bid opening shall email bids@gpo.gov one (1) hour prior to the bid opening date and time to request a Microsoft Teams live stream link. This must be a separate email from the bid submission. The link will be emailed prior to the bid opening.

ISSUE DATE: November 7, 2024

ANY QUESTIONS BEFORE AWARD CONCERNING THESE SPECIFICATIONS, CALL (404) 605-9160, EXT. 4 (TRACI COBB).

SPECIFICATIONS

U.S. Government Publishing Office (GPO)
Southeast Region

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 Publication 310.2, effective December 1, 1987 (Rev. 01-18)) and GPO Contract Terms, Quality Assurance Through Attributes Program for Printing and Binding (GPO Publication 310.1, effective May 1979 (Rev. 09-19)).

PRODUCT: Consists of proofing, printing, and binding of a self-cover pamphlet, packaging, creating/applying mailing/shipping labels to packages, staging, palletizing, and making distribution on the dates specified.

SUBCONTRACTING: The predominant production functions for this procurement are the printing and distribution (shipping/processing mail). Any contractor who cannot perform the predominant production functions will be declared non-responsible.

POST AWARD CONFERENCE: Unless waived by the Government, a post award teleconference will be held to discuss the total requirements of the order as indicated in these specifications and review all aspects of the contractor's internal and external operations required to complete this contract. The items to be discussed are:

- 1) Processing and sorting electronic distribution files
- 2) Scheduled start-up dates for all phases of production
- 3) Coordination/communication from one production phase to another
- 4) Who will be responsible for each phase
- 5) How will subcontractors be involved and kept informed (if applicable)
- 6) Specific production dates of all subcontractors (if applicable)
- 7) How the product will be staged and mailed/shipped
- 8) Any other special requirements which are specific to this

The contractor is responsible for organizing the teleconference. Representatives from the IRS and GPO will participate in the call. To establish coordination of all required operations, the contractor must have a representative from each involved production area for the primary contractor and a representative from all subcontractors (if applicable) in attendance for the call.

FORM NO/TITLE: Instructions for Forms 1040 (and 1040-SR) (2024 rev) (DS); Cat# 24811V

QUALITY LEVEL: IV Quality Assurance Through Attributes (GPO Publication 310.1, effective May 1979 (Rev. 09-19)) applies.

ESTIMATED QUANTITY: 1,429,296 Saddle-Stitched Pamphlets + 3 Agency Samples

NOTE: Contractor to provide bid based on the estimated quantity. This quantity is approximate, and the Government reserves the right to increase or decrease final quantity by up to 30% overall (via email notification to the contractor). Final quantity is subject to change until December 23, 2024. If no quantity changes have been received by this date, the bid quantity will stand as the final contract quantity. Any adjustments in quantity and price (based on the contractor's additional rate) will be addressed in a Contract Modification. See "OFFERS".

The contractor awarded this contract must be prepared to recognize and accept that deadlines must be met regardless of quantity change.

Once the final quantity has been established, NO SHORTAGES will be accepted. The Government will not pay for overs unless shipped at the Government's request.

ESTIMATED PAGES: 116 pages (self-cover)

NOTE: Contractor to provide bid based on the estimated page count. The page count is approximate, and the Government reserves the right to increase or decrease the page count in 4 page increments. Page count is subject to change until the contractor receives the print file. Any adjustments in page count and price (based on the contractor's page count increase/decrease rates) will be addressed in a Contract Modification. See "OFFERS".

TRIM SIZE: 8-3/8 x 10-7/8"**DESCRIPTION:**

Self-cover pamphlet prints type, rule, screen, solid, reverse, and halftone matter in Black ink. Prints head to head.

NOTE: Pamphlets must be printed via conventional offset printing.

GOVERNMENT TO FURNISH VIA EMAIL:

- Purchase Order
- Print file (see "Electronic Media")
- Two (2) distribution files (1 file for TAC/POD addresses and 1 file for TFOP addresses) created in a comma delimited (.csv) format. The contractor must import text from various areas within the files into their own software program to create mailing/shipping address labels required for this contract. The files will contain account number, recipient's name, complete address, telephone number (if furnished) and suggested transportation mode for each destination. The transportation modes will consist of Domestic Mail (DM), Small Package Carrier (SC), Motor Freight (MF---if required), and Air Freight (AF---if required). See "Exhibit #3".
- IRS Form 9659 (Production and Mailing Report) in a fillable PDF file format. See "Exhibit #1".
- IRS Form 6153 (IRS carton label) in a fillable PDF file format. See "Exhibit #4".
- IRS Form 2040 (Electronic Distribution/Shipping Report) in a fillable PDF file format. See "Exhibit #2".

Electronic Media:

- Platform: Unknown
 - Software: One PDF file (Adobe Acrobat DC (or later; backward compatible with 9.1)) will be provided.
- NOTE: Additional system time is required (see below).

1) Contractor must reset the GPO imprint line (located at the bottom of the last page). The GPO imprint line must be set in 6-point sans serif type (e.g., Arial regular) and should consist of the GPO logo, the current calendar year, an em dash, and the jacket number. The GPO logo can be downloaded from <https://www.gpo.gov/how-to-work-with-us/vendors/updates-and-notice>. The items following the GPO logo in the imprint should be added manually by the contractor. Additional commercial identification mark(s) of any kind must not appear on any product(s) ordered.

2) Contractor to create page layout to image as specified (trim size, margins).

3) If necessary, contractor to adjust image to fit trim size and/or center image left to right on the page.

- Colors: May be identified as RGB, CMYK, and/or Spot Colors. If necessary, contractor to convert all colors to Process Black.

- Fonts: All fonts are Embedded and/or Embedded Subset. Do not unembed fonts. This may result in loss of data.

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.

Intelligent Mail Package Barcode (IMpb): Contractor must be an approved USPS Full Service Intelligent Mail Package Barcode (IMpb) provider. Contractor must meet all IMpb preparation and postage documentation requirements as required in the Domestic Mail Manual at time of mailing. All mail must be presented under the contractor obtained Mailer ID (no exceptions).

Internet/Email Requirements: Contractor is required to have Internet access provided through their Internet Service Provider (ISP) with email and a web browser equivalent to Microsoft Edge. The contractor is also required to have Adobe Acrobat DC and Adobe Acrobat 10.1 Professional (or more recent) software (not Adobe Reader) and the capability to receive and open file attachments compressed into a Zip (.zip) file format. Note: Any use of public address or web-based mail servers (i.e. Hotmail, Yahoo, Juno etc.) is strictly forbidden.

Upon award, the contractor must furnish no more than two (2) addresses for the IRS to email all electronic files to avoid any lapse in service.

Daily Production Report (Form 9659): Contractor must email a production report to Mike King (Michael.S.King@irs.gov) and Traci Cobb (tcobb@gpo.gov) DAILY by 1:00 PM Eastern once production begins. The information must be provided via IRS Form 9659 "Production and Mailing Report".

Electronic Distribution/Shipping Report (Form 2040): Distribution/Shipping Form 2040 provides shipping verification, updating IRS' databases, and to inform the destination(s) of the shipping and quantity status.

The contractor MUST update the Electronic Form 2040 and transmit via email to IRS every day the product ships using a "full version" of Adobe Acrobat 10.1 Professional (or more recent) software. Any delay or missed input could result in delay of payment. The contractor must update the Shipping Status, Ship Quantity, and Date Shipped fields with their information as per instructions included in Form 2040 PDF. If any of the information completed by IRS is missing or incorrect, contact Mike King (Michael.S.King@irs.gov).

Electronic Prepress: Immediately upon receipt of Government furnished material (see "Electronic Media") and prior to image processing, the contractor shall perform a basic check (preflight) of the furnished media and publishing files to assure correct output of the required reproduction image. The preflight should identify any problem areas with the digital file submission and should include, but not be limited to, missing or damaged fonts, improper trim size and/or margins, only low-resolution files are included for illustrations, and improper color definition. Any errors, media damage, or data corruption that might interfere with proper file image processing must be reported to Mike King (Michael.S.King@irs.gov), Terri Skyrn (Theresa.L.Skyrm@irs.gov), and Traci Cobb (tcobb@gpo.gov).

The contractor must create or alter any necessary trapping, set proper screen angles, and screen frequency, and define file output selection for the imaging device being utilized. Furnished files must be imaged as necessary to meet the assigned quality level.

Contractor must have the ability to edit PDF files. Contractor is not to request that electronic files provided be converted to a different format. If contractor wishes to convert files to a different format, the final output must be of the same or higher quality and at no additional cost to the Government.

High resolution output (minimum 110-line screen for all halftones and screens, 1200+ dpi for the balance) required.

When required by the Government, the contractor shall make minor revisions to the electronic files. It is anticipated that the Government will make all major revisions.

Prior to making revisions, contractor shall copy the furnished files and make all changes to the copy.

STOCK: The specifications of all paper furnished must be in accordance with those listed herein or listed for the corresponding JCP Code numbers in the *Government Paper Specification Standards, No. 13*, dated September 2019.

JCP Code A15, White Standard Newsprint, Basis Size 24 X 36", Basis Weight 27.7# -30#*

*Contractor's option on basis weight. The contractor must use the same basis weight throughout the entire run.

All paper used in each copy must be of uniform shade.

INK: Black

MARGINS: Follow file setup* - adequate gripper. "See "ELECTRONIC MEDIA" for additional information.

SOFT PROOFS: Contractor must provide soft proofs(*) to the department via email.

Proof will be withheld not longer than 2 workday(s) from date of receipt by the Government** to date of proof approval and/or corrections from the ordering agency via email.

**NOTE: The date of receipt by the Government is NOT considered the first workday.

Contractor furnished proof approval letters will not be recognized for proof approval/disapproval. Contractor must not print prior to receipt of an "OK to print" via email from the agency.

(*) One "Press Quality" PDF Proof (for approval of image position, margins, pagination, and final trim size) using the same Raster Image Processor (RIP) that will be used to produce the final printed product. Proof must show color and contain all crop marks. NOTE: This proof will not be used/approved for color match or resolution.

Email the PDF proof to Mike King (Michael.S.King@irs.gov), Terri Skyrn (Theresa.L.Skyrm@irs.gov), and Traci Cobb (tcobb@gpo.gov). Include GPO Jacket Number & IRS Requisition Number in the email subject line.

BINDING: Saddle-stitch in 2 places on the 10-7/8" left dimension. Trim 3 sides. Single leaves connected with a lip (i.e., binding stub) to the left or right side of stitches will be allowed provided the lip does not extend past the bind margins of the adjacent pages.

PACKING: Shipments must be packed in quantities of 82 copies per carton (two (2) stacks of 41 copies)*. Product must be packed so copies are not damaged in transit. Contractor to place full size corrugated boards on top and bottom of stacks.

*NOTE: The final page count may increase/decrease the total number of copies per carton. Contractor must confirm carton quantity with Mike King (Michael.S.King@irs.gov) prior to packing.

All cartons must be packed solid with a maximum weight of 32 lbs per carton. Pack solid in corrugated or solid fiber shipping containers, minimum bursting strength 200p.s.i and minimum edge crush strength 35p.s.i. Carton bottoms may be glued or sealed with polyester tape (2 to 3 inches width), minimum 12kNm (65 lbs./inch) traverse tensile strength. Cartons are to be sealed at the top with paper or polyester tape (2 to 3 inches width, not reinforced). Contractor will determine exact dimensions of carton in accordance with folded and/or trim size and weight of the product produced. Cartons must not exceed 17-1/2" (L) x 11-1/2" (W) x 9" (D) in exterior dimensions.

Cartons must not have excessive air space (dunnage) when fully packed to prevent crushing or deformation. Carton filler (if necessary) must be composed of material that can be easily removed without damaging contents. Packing peanuts/beads are not acceptable carton fillers. Cartons must not open nor split during transit through the motor freight/air freight carrier delivery systems.

Stapling of top or bottom flaps on cartons, furnishing cartons with separate lids, overstuffing or crowning cartons, and sealing cartons with plastic strapping is strictly prohibited.

LABELING: All cartons (except for the blue label copies) require an IRS carton label (Form 6153). Packages shipping via Small Package Carrier (SPC) or USPS Ground Advantage require an additional label as applicable per shipping method. Correct labeling of shipping cartons, in strict accordance with the requirements of these specifications, is essential to the identification and distribution activities of the recipients. Use of any other labels is prohibited and may be cause for rejection of reimbursement for any expenses incurred to correct use of improper labels.

IRS carton label (Form 6153): Contractor must reproduce shipping carton label at 100% on white paper or white adhesive label stock in black ink from furnished PDF file, fill in appropriate fields and securely attach one label to each carton. Carton labels contain barcodes; therefore, dot matrix printing is NOT acceptable.

The completed IRS carton label must be affixed securely to one end of the carton only (never on top, long-side, or bottom). The IRS carton label must not extend over the edge of the carton and onto an adjacent side.

The following must be updated ELECTRONICALLY by the contractor, when not entered by IRS on the PDF label using minimum 12pt type and black ink. Do not make hand-written updates to the label under any circumstances.

--Carton # of #
--From Address
--To Address

If the remaining fields on the furnished IRS carton label are blank or the quantity stated on the carton label is not the same quantity being packed within the carton, the contractor must notify Mike King (Michael.S.King@irs.gov) to resolve the discrepancy prior to creating labels and packing.

If requested, the contractor must send an electronic PDF proof of label prior to reproducing.

FAILURE OF THE CONTRACTOR TO COMPLETE THE PDF LABEL ELECTRONICALLY WILL RESULT IN THE SHIPMENT BEING REJECTED AND RE-LABELED AT THE CONTRACTOR'S EXPENSE.

Automated "Carton # of #" fields: To print the correct number of labels for each address with sequential carton numbers, input in the total number of cartons and press "Print Labels" button. Warning: Once the print button is pressed, printing cannot be canceled. Be sure all information is correct prior to printing labels.

If pallets are required, and in addition to a completed IRS Form 6153 being applied to each carton, contractor must securely affix a completed IRS carton label to all four sides of the shrink-wrap and to the top of each pallet. In addition, the labels affixed to cartons on pallets must be facing out to be easily read, once palletized.

Small Package Carrier (SPC) Labeling: In addition to the IRS carton label (Form 6153), a contractor created SPC label must be securely affixed to EACH carton shipping via SPC. The SPC label must be affixed securely to the TOP of the container. The SPC label must not extend over the edge of the carton and onto an adjacent side.

Currently, IRS uses UPS as the Small Package Carrier. Contractor MUST generate UPS shipping labels electronically. It is the responsibility of the contractor to be familiar with electronic shipping methods via UPS and how 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.).

Contractor must image/print approximately ten (10) lines from the furnished distribution (.csv) files in black ink, minimum 12pt type, on each SPC label. Imaging/Printing on each SPC label consists of: recipient's account number on first line (i.e. TF 123456A or p123456789); recipient's name, and 10-digit telephone number (if supplied) on second line; recipient's street address on third line; recipient's city, state, and zip code on fourth line; Bloomington, IL return address in top left-hand corner; and two (2) reference fields at bottom. See below for Bloomington, IL address and reference fields.

Imaging/Printing of UPS labels must meet all UPS requirements and regulations at time of shipping.

USPS Ground Advantage Labeling: In addition to the IRS carton label (Form 6153), a contractor created USPS Ground Advantage mailing label must be securely affixed to EACH carton shipping via USPS Ground Advantage. The USPS Ground Advantage label must be affixed securely to the TOP of the container.

Contractor must image/print approximately eleven (11) lines from the furnished distribution (.csv) files in black ink, minimum 12pt type, on each USPS label. Imaging/Printing on each USPS label consist of: recipient's account number on first line (i.e. p123456789 or TF123456A); recipient's name, and 10-digit telephone number (if supplied) on second line; recipient's street address on third line; recipient's city, state, and zip code on fourth line; Intelligent Mail parcel barcode (IMpb) created by the contractor per the Domestic Mail Manual (DMM) requirements at time of mailing; Bloomington, IL return address in top left-hand corner of all USPS labels; and two (2) reference fields at bottom. See below for Bloomington, IL address and reference fields.

Return Address and Reference Fields for Small Package Carrier (SPC) & USPS Ground Advantage Labeling: Contractor must image/print in black ink the following return address and reference fields on all contractor created UPS and USPS labels:

Internal Revenue Service
National Distribution Center
2525 Revenue Drive
Bloomington, IL 61705-2500

1. Reference Field 1: IRS requisition number and GPO jacket number (i.e. 5-00667/623-506)
2. Reference Field 2: TAC or TFOP (as applicable)

PALLETS: All shipments to a single destination weighing more than 750lbs. require pallets.

Pallets must be type III and must conform to the Federal Specifications NN-P-71C, and any amendments thereto except for dimensions and single center stringer (see "Exhibit #5"). Pallets must be 48" in length and 40" in width and must not exceed 5" in height. Full entry MUST be on the 40" width. Strict adherence to these dimensions is necessary to accommodate storage requirements and ease of packing into freight carrier trailers. Receipt of incorrect pallets may result in a charge for each incorrect pallet, which will be assessed against the contractor. This charge will cover additional costs incurred by IRS to repalletize the shipment onto correct pallets.

Cartons shall be stacked on pallets using a reverse layer pattern, 9 cartons per layer, with a maximum height of 55", including pallet or a maximum of 7 layers (see "Exhibit #5" IRS Pallet Specifications sheet for the 9 tier stacking method). Each carton contained on a pallet must show the completed IRS label (Form 6153) on the exposed side, once palletized.

Cartons must be fastened securely to the pallet in a manner that will prevent movement during transit but permit ready removal, without damage to the cartons, at destinations. Do not use metal strapping or pallet caps for securing material on pallets. Do not double-stack pallets. There must be no more than one partial pallet per destination.

Bill of Materials List for Pallets: A list must be compiled detailing the items on each truck and the quantities per item. Each pallet must be identified on two sides with a minimum 3" high number in black. The number on the pallet must correspond to the number on the list. The list is to be on a bright color stock and inserted into a

minimum 4 x 4" plastic sleeve or on white stock and inserted into a bright colored sleeve and affixed to the last pallet on each truck.

PACKAGING AND PACKING PROBLEMS: In addition to other inspection procedures detailed elsewhere in these specifications, the contractor is responsible for correcting all packaging and packing problems (i.e., mislabeled cartons, carton labels not being used or securely attached, cartons not being packed solid, incorrect pallets, or pallets not being layered correctly). Shipments received with packaging and/or packing problems will require the contractor to make the corrections on site with all costs borne by the contractor. Contractor must make all corrections within 24 hours of email notification. If the corrections are not completed by the contractor within 24 hours of notification, the Government will hire an outside vendor to make all corrections. The contractor will be billed by GPO for the amount accrued by the outside vendor in correcting the problem.

"Mislabeling" means any error on the carton label, which incorrectly states or identifies the title of the form; the form identification number; or the quantity of forms contained in the carton, or has any missing information, or is not securely attached.

COPIES DAMAGED IN TRANSIT: Contractor must replace and ship all copies damaged in transit via overnight delivery within 24 hours of notification. Contractor will be notified of damaged copies via email. Contractor will incur all charges to replace and ship damaged copies if the damage is caused by the contractor not complying with all requirements of the contract relative to packing and shipping.

SHIPPING METHODS: Ship/mail f.o.b. contractor's city copies as defined by the below shipping methods. NOTE: If there is a discrepancy between the suggested transportation mode indicator in the furnished distribution files and the contract specifications, contractor must immediately notify Mike King (Michael.S.King@irs.gov) for resolution prior to proceeding. If contractor ships or mails incorrectly, contractor will bear all additional costs incurred by the Government.

Domestic Mail (DM): Mailings must be made at USPS Ground Advantage postage rates. Contractor will be reimbursed for postage costs after providing the Government a detailed report containing the following information: Ship Date, Postage Amount, Recipient Name & Complete Address, and Tracking Number for each carton shipped.

It is anticipated that approximately 1,640 copies will mail reimbursable postage to approximately 10 destinations.

The contractor must comply with all U.S. Postal Service regulations/requirements governing the preparation of USPS Ground Advantage rate mailings which are in effect at the time of the mailing.

The DM transportation mode applies when:

- An address contains a P.O. Box and a street address is NOT present within the same line in the distribution file.
- An address is an APO, FPO, or U.S. Post Office destination.

Priority Mail (if required): A carton label will be provided for any cartons which must be shipped priority mail. The contractor must print the necessary quantity of priority mail labels required. Priority mail labels must be affixed to the top of each carton. Hand stamping of priority mail cartons is unacceptable. IRS priority mail must be entered into the contractor's local post office for mailing. Contractor will provide manifests for delivered permit mail labels. The contractor must prepare the appropriate postal service forms for turnover to the local postal authorities.

Small Package Carrier (SPC) Shipments: Contractor must ship via SPC Ground services when the SC transportation mode applies. The SC (also known as SPC) transportation mode applies when:

- A street address is a non-expedited (ground) shipment weighing less than 750lbs to one destination within the 48 contiguous states, Alaska, Hawaii, or Puerto Rico. Contractor must follow UPS requirements and, complete and attach all necessary paperwork required (i.e. commercial invoice, etc.) to shipments destined to Puerto Rico.

NOTE: When an address contains both a P.O. Box and a street address, and the shipment weighs less than 750lbs but is NOT an APO, FPO, or U.S. Post Office location, contractor must disregard the P.O. Box and utilize the street address. In addition, the SPC label must not contain the P.O. Box.

The IRS will notify the contractor when expedited shipments are required and will determine the SPC expedited shipping method to be used by the contractor.

- Expedited shipments (if required) weighing less than 500 lbs. to one destination within the 48 contiguous states, Alaska, Hawaii or Puerto Rico must be sent via small package carrier.

International packages (if required) weighing less than 500 lbs to one destination will be sent via small package carrier World Wide Express services.

The IRS will provide an IRS small package account number. The contractor must notify Mike King (Michael.S.King@irs.gov) at least 10 days prior to the first scheduled ship date to ensure an account number has been established, and/or is valid. If there is any uncertainty concerning the instructions for small package carrier shipments, the contractor must notify Mike King at least one (1) week prior to the first ship date for clarification.

If multiple small package carriers are to be used, an account number will be assigned for each carrier. Contractor is required to ship IRS copies using the IRS designated carrier(s) and their assigned account number(s), or the contractor will be responsible for any additional shipping costs incurred by the Government.

Contractors are required to use a two-part manifest shipping report for each carrier that includes both a summary page and detailed shipping pages. The summary page is compiled using the information from the detailed shipping pages. The summary page must include the following information: 1) ship date; 2) shipper name; 3) complete address; 4) account number; 5) requisition number; and 6) totals for number of pieces and weight categorized by zone with grand totals for each.

The detailed shipping pages should include the following information for each package listed: 1) account number; 2) consignee's name; 3) complete consignee address; 4) zone; 5) weight; and 6) the matching shipper receipt portion of the traceable label. The original copy of the report should accompany the shipment.

The contractor must notify the SPC of the volume to be picked up to allow for the carrier to provide adequate equipment for the pickup.

Email Notification: When an email address is present in the .csv distribution files, the contractor is required to send a same day email notification of the shipment to the email address listed. All email notifications must include the following: IRS product short title; scheduled delivery date; recipient's name and address; number of packages; type of service; weight; SPC tracking number and a link to the SPC website; and reference numbers (reference field 1 (IRS requisition number and GPO jacket number) and reference field 2 (IRS type of account (i.e. TAC/POD or TFOP) and account number (i.e. p123456789 or TF123456A). See "Exhibit #6".

NOTE: All returned emails should be set to automatically forward to: wi.tdfps.upsundelive@irs.gov.

The contractor must email the SPC shipping manifest including a "TRACK IT" link for each destination to Mike King (Michael.S.King@irs.gov) and Traci Cobb (tcobb@gpo.gov) within three (3) workdays of shipping complete.

Motor Freight (MF) Shipments: Contractor must ship via Motor Freight when the total shipping weight to a single destination is 750lbs or more, unless otherwise instructed by the Government. All Motor Freight shipments will be completed by an Internal Revenue Bill of Lading. IRBL(s) will be furnished to the contractor electronically by the IRS Postal & Transport Policy Office. If an IRBL(s) is/are not provided at least five (5) workdays prior to the first shipment date, the contractor must notify Tamara Franklin (309-556-5017 or Tamara.M.Franklin@irs.gov) or Roy Murdoch (309-556-5076 or Roy.M.Murdoch@irs.gov) immediately to make arrangements to receive IRBLs. The contractor will be required to complete information including but not limited to: total weight of shipment; number of cartons; number of pallets on the IRBL(s) prior to shipment.

The IRBL(s) will have designated carriers identified that provide special negotiated freight rates for IRS shipments. Contractor must contact the designated carrier listed on the IRBL at least two (2) days prior to first ship date to schedule a date and time for pickup. If the contractor has any difficulty getting the designated carrier to confirm a scheduled pickup, contractor must immediately contact Roy Murdoch or Tamara Franklin between the hours of 8:30 AM and 4:00 PM Eastern standard time.

The contractor must not change the designated carrier(s) without prior written approval from the IRS. In the event the designated carrier(s) cannot be utilized, or if the contractor experiences a problem with the designated carrier, the contractor must immediately contact Tamara Franklin (309-556-5017 or Tamara.M.Franklin@irs.gov) or Roy Murdoch (309-556-5076 or Roy.M.Murdoch@irs.gov) to obtain alternate carrier(s) authorization. NOTE: If the contractor uses a carrier other than the designated carrier without prior written approval from the IRS, the contractor will be held responsible for any additional shipping costs incurred.

Multiple Truckload Shipments: Whenever possible full truckloads should be utilized (e.g., use a full truckload and a partial truckload rather than two partial truckloads). The contractor will be provided multiple IRBLs for shipments to an individual destination exceeding a truckload. Only one bill of lading should be released for each truckload.

The contractor is accountable to the IRS for all IRBL(s) furnished under this contract. Contractor must notify IRS of all unused IRBL numbers furnished under this contract. Notification of unused IRBL numbers must be emailed to Mike King (Michael.S.King@irs.gov). Any unused bills of lading must be destroyed by the contractor. Use of IRBLs for shipments not authorized by the IRS is strictly prohibited.

The contractor must email IRBLs containing truckers' signatures and dates copies were picked up from contractor's plant to Mike King (Michael.S.King@irs.gov) and Traci Cobb (tcobb@gpo.gov) within two (2) workdays of shipping complete.

Air Freight Shipments (if required): The contractor will be notified by the IRS if Air Freight Shipments are required. Air bills will be provided by the IRS for shipments weighing 500lbs or more to a single destination. The contractor must contact the designated air freight carrier to coordinate all air shipments, verify acceptance of pallets, and maximum pallet weight is within that specific carrier's allowable weight limit.

The contractor must email IRBLs containing air freight carrier signatures and/or UPS manifest including a "TRACK IT" link for each destination to Mike King (Michael.S.King@irs.gov) and Traci Cobb (tcobb@gpo.gov) within two (2) workdays of shipping complete.

SCHEDULE: 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 printing media. In such an event, the schedule will be adjusted in accordance with GPO Contract Terms.

Purchase Order: The Purchase Order will be emailed to the contractor on or before **November 26, 2024**. NOTE: Immediately upon award, contractor must provide Mike King (Michael.S.King@irs.gov) and Traci Cobb (tcobb@gpo.gov) with two (2) or less email addresses to receive the Government furnished materials.

Post-Award Conference: The post-award conference to discuss the production requirements of this contract will be held **within two weeks after award**. The contractor is responsible for organizing the teleconference.

Print File and Distribution Lists: Print file and final distribution lists (IRS Form 2040 & .csv files) will be emailed to the contractor on or before **December 23, 2024**.

Soft Proofs: Contractor must deliver proofs to the ordering agency on or before **December 26, 2024**.

F.O.B. Destination:

-Deliver a total of 3 samples to one address on or before **January 10, 2025** - see "DISTRIBUTION" for address information.

F.O.B. Contractor's City:

-Ship* a total of approximately 100,860 copies to approximately 343 addresses (**all TAC/POD** destinations, i.e. accounts appearing in file as "p123456789") on **January 10, 2025**.

-Ship* a total of approximately 1,328,236 copies to approximately 3,500 addresses (**all TFOP** destinations, i.e. accounts appearing in file as "TF123456A") on **January 17, 2025**.

*NOTES: 1) Destinations furthest from contractor's shipping location must ship first; destinations closest to contractor's shipping location must ship last. 2) If authorized by the Government, contractor may start to ship earlier. 3) No shortages will be accepted. In addition, the Government will not pay for overs unless shipped at the Government's request.

-Ship 200 copies to one address on **January 17, 2025** - see "DISTRIBUTION" for complete address.

Unscheduled material such as shipping documents, receipts or instructions, delivery lists, labels, etc., will be furnished per the "Schedule" 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.

DISTRIBUTION:

Email the PDF proof on or before December 26, 2024 to Mike King (Michael.S.King@irs.gov), Terri Skyrn (Theresa.L.Skyrm@irs.gov), and Traci Cobb (tcobb@gpo.gov). Include GPO Jacket Number & IRS Requisition Number in the email subject line.

F.O.B. Destination:

-Deliver a total of 3 samples via overnight traceable means on or before January 10, 2025 to: IRS / NDC, Attn: Mark Swiger / Mike King, 2525 Revenue Dr., Bloomington, IL 61705. NOTE: These copies are sample copies and must not be included in the quantity billed or on IRS Forms 2040 and 9659. Contractor must email the tracking number to Mike King (Michael.S.King@irs.gov) and Traci Cobb (tcobb@gpo.gov) immediately upon shipping.

F.O.B. Contractor's City:

-Ship* a total of approximately 100,860 copies to approximately 343 addresses (**all TAC/POD** destinations, i.e. accounts appearing in file as "p123456789") on January 10, 2025.

-Ship* a total of approximately 1,328,236 copies to approximately 3,500 addresses (**all TFOP** destinations, i.e. accounts appearing in file as "TF123456A") on January 17, 2025.

*NOTES: 1) Destinations furthest from contractor's shipping location must ship first; destinations closest to contractor's shipping location must ship last. 2) If authorized by the Government, contractor may start to ship earlier. 3) No shortages will be accepted. In addition, the Government will not pay for overs unless shipped at the Government's request.

-Ship 200 "Blue Label**" copies on or before January 17, 2025 to: IRS/National Distribution Center, Blue Label Copies, 2525 Revenue Drive, Bloomington, IL 61705-2500.

****DEPARTMENTAL RANDOM COPIES (BLUE LABEL):** The order must be divided into 200 equal sublots. A random set must be selected from each subplot. Do not choose copies from the same general area in each subplot. The contractor will be required to certify that copies were selected as directed using GPO Form 917-Certificate of Selection of Random Copies (located on GPO.gov). The random copies constitute a part of the total quantity ordered, and no additional charge will be allowed.

These randomly selected copies must be packed separately and identified by a special label (GPO Form 2678-Departmental Random Copies Blue Label) that must be printed on blue paper and affixed to each affected container. This form can be downloaded from GPO.gov. The container and its contents shall be recorded separately on all

shipping documents and be sent in accordance with the distribution list. A copy of the purchase order/specification and a signed Certificate of Selection of Random Copies must be included.

NOTE: All shipments must be completed as indicated in the distribution lists. Contractor must notify the ordering agency as indicated in "SHIPPING METHODS". In addition, contractor must notify the GPO Southeast Region (infosoutheast@gpo.gov) and GPO Compliance (compliance@gpo.gov) upon completion of each scheduled ship date. The subject line of this message shall be "Distribution Notice for Jacket 623-506, Req 5-00667". The notice must provide all applicable tracking numbers, shipping method, and title. Contractor must be able to provide copies of all delivery, mailing, and shipping receipts upon agency request.

QUALITY ASSURANCE THROUGH ATTRIBUTES: The bidder agrees that any contract resulting from bidder's offer under these specifications shall be subject to the terms and conditions of GPO Pub. 310.1 "Quality Assurance Through Attributes – Contract Terms" in effect on the date of issuance of the invitation for bid.

GPO QATAP (GPO Publication 310.1) –

<https://www.gpo.gov/docs/default-source/forms-and-standards-files-for-vendors/qatap-rev-09-19.pdf>.

LEVELS AND STANDARDS: The following levels and standards shall apply to these specifications:

Product Quality Levels:

- (a) Printing (page related) Attributes – Level IV
- (b) Finishing (item related) Attributes – Level IV

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

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

Specified Standards: The specified standards for the attributes requiring them shall be:

Attribute Specified	Specified Standard	Alternate Standard*
P-7 Type Quality and Uniformity	Approved PDF (Page Integrity)	File Setup
P-8 Halftone Match	File Setup	

*In the event that the Specified Standard is waived, the Alternate Standard will serve as its replacement.

OFFERS: Offers must include the cost of all materials and operations for the total quantity ordered in accordance with these specifications. In addition, a price must be submitted for additional copies (per thousand) and for page count increase/decrease (in 4 page increments). The price of the additional quantities must be based on a continuing run, exclusive of all basic or preliminary charges. The price for page count change must be inclusive of all preliminary charges. The additional rate and page count rates will NOT be a factor for determination of award.

BID SUBMISSION: Bidders must email bids to bids@gpo.gov for this solicitation. No other method of bid submission will be accepted at this time. The Jacket Number (623-506) and bid opening date must be specified in the subject line of the emailed bid submission. ***Bids received after the bid opening date and time specified on page 1 will not be considered for award.***

NOTE: Bidders are to fill out, sign/initial, and return pages 13 and 14.

ADDITIONAL EMAILED BID SUBMISSION PROVISIONS: The Government will not be responsible for any failure attributable to the transmission or receipt of the emailed bid including, but not limited to, the following –

1. Illegibility of bid.
2. Emails over 75 MB may not be received by GPO due to size limitations for receiving emails.
3. The bidder's email provider may have different size limitations for sending email; however, bidders are advised not to exceed GPO's stated limit.
4. When the email bid is received by GPO, it will remain unopened until the specified bid opening time. Government personnel will not validate receipt of the emailed bid prior to bid opening. GPO will use the prevailing time (specified as the local time zone) and the exact time that the email is received by GPO's email server as the official time stamp for bid receipt at the specified location.

PRE-AWARD SURVEY: In order to determine the responsibility of the prime contractor or any subcontractor, the Government reserves the right to conduct an on-site preaward 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. As part of the financial determination, the contractor in line for award may be required to provide one or more of the following financial documents:

- 1) Most recent profit and loss statement
- 2) Most recent balance sheet
- 3) Statement of cash flows
- 4) Current official bank statement
- 5) Current lines of credit (with amounts available)
- 6) Letter of commitment from paper supplier(s)
- 7) Letter of commitment from any subcontractor

The documents will be reviewed to validate that adequate financial resources are available to perform the contract requirements. Documents submitted will be kept confidential and used only for the determination of responsibility by the Government. Failure to provide the requested information in the time specified by the Government may result in the Contracting Officer not having adequate information to reach an affirmative determination of responsibility.

PAYMENT: Submitting invoices for payment via the GPO fax gateway utilizing the GPO barcode coversheet program application is the most efficient method of invoicing. Instruction for using this method can be found at the following web address: <http://winapps.access.gpo.gov/fms/vouchers/barcode/instructions.html>.

Invoices may also be mailed to: U.S. Government Publishing Office, Office of Financial Management, Attn: Comptroller, Stop: FMCE, Washington, DC 20401.

NOTE: Vendors are expected to submit invoices within 30 days of job shipping/delivery.

For more information about the billing process refer to the General Information of the Office of Finance web page located at <https://www.gpo.gov/how-to-work-with-us/vendors/how-to-get-paid>.

On the same day the billing invoice is submitted to GPO for payment, the contractor is to email a copy of the invoice and all supporting documents to Mike King (Michael.S.King@irs.gov).

CONTRACTOR: _____

SHIPMENT(S): Shipments will be made from: City _____, State _____
Shipments/mail must be processed at the contractor's facility. Transportation charges are not a factor in determining award.

Bid Amount: _____

Additional Rate: _____ *Per M*

4 Page Increase: _____ *Per M*

4 Page Decrease: _____ *Per M*

SUBCONTRACTOR(S): Company name, address, contact name and telephone number, and production function of subcontractor(s), if any, who will perform on this contract.

_____.

_____.

LOCATION OF POST OFFICE: All mailing will be made from the _____

Post Office located at Street Address _____,

City _____, State _____, Zip Code _____.

(Contractor's Initials)

(COMPLETE AND SUBMIT THIS PAGE WITH YOUR BID)

DISCOUNTS: Discounts are offered for payment as follows: _____ Percent, _____ calendar days. See Article 12 "Discounts" of Solicitation Provisions in GPO Contract Terms (Publication 310.2).

BID ACCEPTANCE PERIOD: In compliance with the above, the undersigned agree, if this bid is accepted within _____ calendar days (60 calendar days unless a different period is inserted by the bidder) from the date for receipt of bids, to furnish the specified items at the price set opposite each item, delivered at the designated points(s), in exact accordance with specifications.

NOTE: Failure to provide a 60-day bid acceptance period may result in expiration of the bid prior to award.

AMENDMENT(S): Bidder hereby acknowledges amendment(s) number(ed) _____

BIDDER'S NAME AND SIGNATURE: Unless specific written exception is taken, the bidder, by signing and submitting a bid, agrees with and accepts responsibility for all certifications and representations as required by the solicitation and GPO Contract Terms – Publication 310.2. When responding by email, fill out and return one completed copy of all applicable pages that include the Jacket Number, Bid Price, Additional Rate, Discounts, Amendments, Bid Acceptance Period, and Bidder's Name and Signature, including signing where indicated. Valid electronic signatures will be accepted in accordance with the Uniform Electronic Transactions Act, § 2. Electronic signatures must be verifiable of the person authorized by the company to sign bids.

Failure to sign the signature block below may result in the bid being declared non-responsive.

Bidder _____
(Contractor Name) (GPO Contractor's Code)

(Street Address)

(City – State – Zip Code)

By _____
(Printed Name, Signature, and Title of Person Authorized to Sign this Bid) (Date)

(Person to be Contacted) (Telephone Number) (Email)

THIS SECTION FOR GPO USE ONLY

Certified by: _____ Contracting Officer: _____
(Initials and Date) (Initials and Date)

(COMPLETE AND SUBMIT THIS PAGE WITH YOUR BID)

Exhibit #1

Production and Mailing Report

Complete this form daily for each product monitored. Be sure to change the Date Submitted field each day. The QM Submitting field must show the name of the QM submitting this report. The entry in a production operation (printed, imaged, etc.) must be the total for that day and that operation. Do not use commas in the quantities, they format automatically and the total will display in the Cumulative Totals row.

Contractor	City	State
<div style="border: 1px solid black; height: 15px;"></div>	<div style="border: 1px solid black; height: 15px;"></div>	<div style="border: 1px solid black; height: 15px;"></div>
Product(s)	GPO Jacket(s)	
<div style="border: 1px solid black; height: 15px;"></div>	<div style="border: 1px solid black; height: 15px;"></div>	
QM submitting	Date submitted	
<div style="border: 1px solid black; height: 15px;"></div>	<div style="border: 1px solid black; height: 15px;"></div>	

Date	Printed	Bound/Finished	Imaged	Inserted	Other	Mailed		
							+	x
Cumulative totals								

Comments (Ex: SC or BMC mail totals or production notes)

Exhibit #2

Shipping Status: ☐ Start ☐ Partial ☐ Complete **Instructions** Preliminary

Distribution / Shipping List							Save 2040
Requisition number	Jacket number / Source	Print order number	Originator symbols	Contractor code	Date		
Item (Form, Document, Publication, Notice etc.)	Catalog number	Revision date	<input type="checkbox"/> Reprint <input type="checkbox"/> Revision	Ship date	<input type="checkbox"/> FOB contractor city <input type="checkbox"/> FOB destination		
Printing specialist	Phone number	Distribution analyst	Phone number	Cartor quantity	Weight factor	Quantities stated below are <input type="checkbox"/> each <input type="checkbox"/> pads <input type="checkbox"/> sheets <input type="checkbox"/> sets <input type="checkbox"/> rolls	
Title/Description							
Remarks							
OPN	IRS Centers			Order Quantity	Ship Quantity	Date Shipped	
				Grand Total			

Form 2040 (9-2005) Catalog number 71120B www.irs.gov Department of The Treasury - Internal Revenue Service

Exhibit #3

ELITE | Distribution List

Beginning Oct 1, 2011, contractor lists provided by Distribution Requirements personnel will be provided in comma delimited format versus Microsoft Excel. This will provide for a smaller file size, resulting in a more efficient transmission. Additionally, the new distribution files will have additional fields added. The new fields will reduce the amount of file manipulation needed by the contractor and allow for easier direct import into a shipping system.

Below is an overview of fields that will be included in the new file, along with the corresponding field in the UPS WorldShip system software.

IRS Header Title	Length	UPS WorldShip Field Name
Program Account	12	Reference Field 2
Contact	35	Attention
Phone	15	Telephone
Extension		
Organization	35	Company or Name
Supplementary Address	35	Address Line 1
Delivery Address	35	Address Line 2
City	35	City or Town
State	5	State/Province/County
Zip	9	Postal Code
Country	5	Country/Territory
Email Address	50	Recipient Email Address
Email Notification	1	QVN (Quantum View Notification) or Return Notification Option. Also used for: * QVN Ship Notification * QVN Delivery Notification
Loading Dock	1	Not Used for Small Package
Inside Delivery	1	Not Used for Small Package
Suggested Transportation	2	DM = Domestic Mail (United States Postal Service MUST be used) SC = Small Package Carrier MF = Freight (Bill of Lading Required) AF = Air Freight (Bill of Lading Required)
Requisition Jacket Number	20	Reference Field 1
SKU	18	
Short Title	20	
Product Quantity	8	
Product Cartons	4	
Product Weight	4	
Shipment Cartons	4	Number of Packages
Shipment Weight	4	Actual Weight
Service Type	3	Service Type (GRD = Ground)
Package Type	2	Package Type (CP = Consumer Packaging)
Failed email address	50	Failed Email Address
Email Ship From Name	3	QVN or Return Notification Ship From Company or Name
Email Memo Body	150	QVN or Return Notification Memo

Exhibit #4

Read Prior to Producing or Labeling Cartons

Labels **MUST** be generated from the PDF file provided. Handwritten updates are not allowed on any label. If these instructions are not followed, the Contractor will be held responsible for all re-labeling charges.

Section I – Prior to Producing Label

- 1) Contact the IRS for a new carton label if any of the following fields are blank when the label is received:
(a) Catalog number, (b) Revision, (c) Requisition number, (d) Product number, or (e) Product title.
- 2) Fields for Contractor to Update Electronically: (a) Carton # of # (see number Section I, 3 below); (b) From address; (c) To address (see exception under Section II, 2, Cartons via Small Package Carrier (SPC) below); and (d) Carton quantity (if carton quantity is blank, it must be updated with the correct packing quantity).
- 3) Automated Carton # of # fields: To print the correct number of labels for each address with sequential carton numbers, input the total number of cartons in second # field and press "Print Labels" button. **Warning: Once the print button is pressed, printing cannot be canceled. Be sure all information is correct prior to printing.**
- 4) Printing: Labels must be produced same-size in black ink on white paper.
- 5) Proof: An electronic proof of the label may be required if indicated on the contract or print order.

Section II – Labeling for Shipment

- 1) Cartons: All cartons must have IRS shipping label affixed to one end of the carton only (never on top, long-side, or bottom).
- 2) Cartons via Small Package Carrier (SPC): Affix SPC label to top of carton on edge nearest to IRS label. If shipping via SPC to the IRS National Distribution Center, leave the "To (Consignee)" address field blank.
- 3) Small SPC packages/boxes/envelopes via SPC: Affix IRS label to front of package and SPC label to the back. This includes advance distributions and IRS samples.

cut here _____ cut here

Phaser 7300DX - Room 6: Print Labels SAVE AS RESET

Carton Shipping Label

Department of the Treasury Internal Revenue Service		Publishing analyst	Phone number	Carton #	of # 1
GPO Jacket number		Print order number	Program number		
From (Contractor name and address)			To (Consignee)		
Catalog number	Revision (YYYY-MM-DD)				
Product number (Form, Document, Publication, etc)			Product title		
Carton quantity	Requisition number (YY-nnnn)				

Form 6153 (Rev. 3-2006) Catalog Number 62724N Department of Treasury - Internal Revenue Service

Phaser 7300DX - Room 6: Print Labels SAVE AS RESET

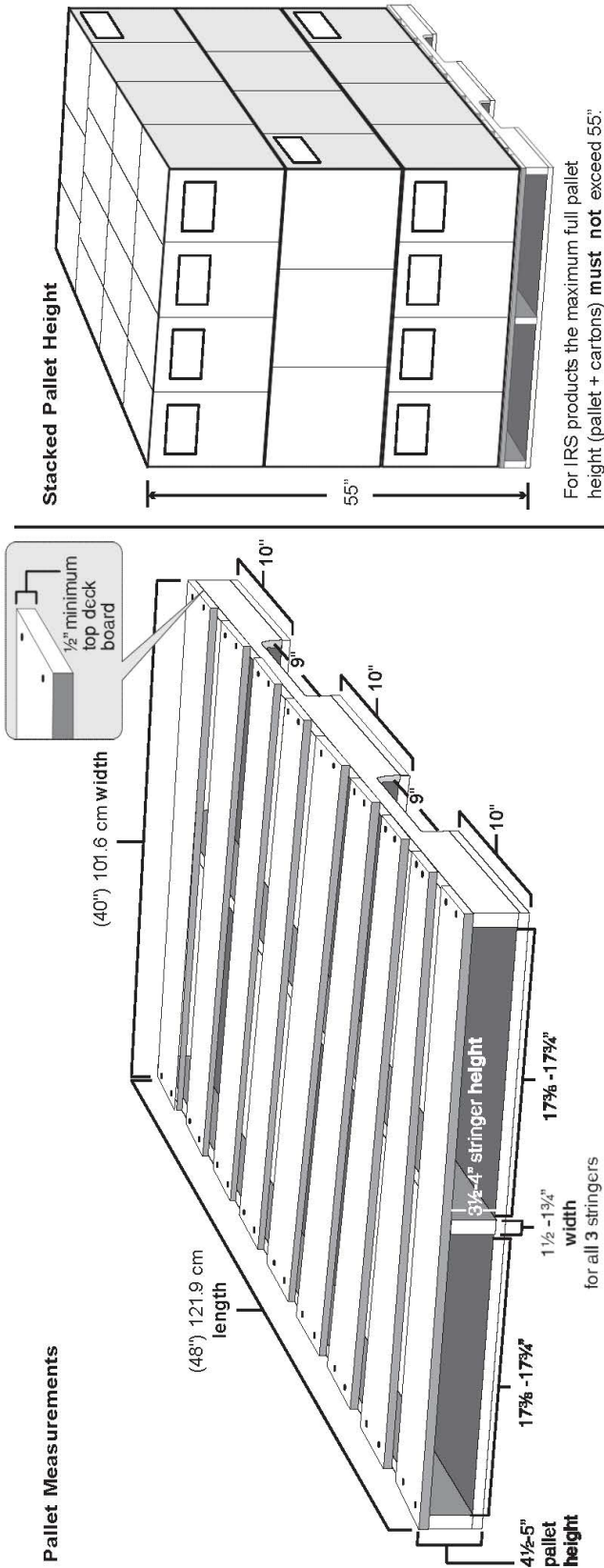
Exhibit #5

IRS Pallet Specifications

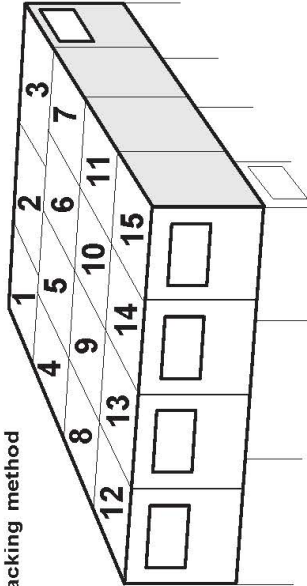
All shipments delivered to the National Distribution Center (NDC), must conform to the specifications outlined in this document.



Pallet Measurements

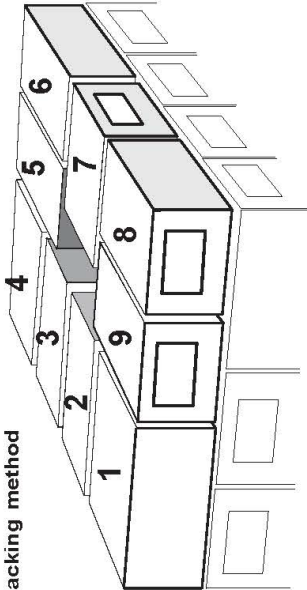


15 tier stacking method



Shipments requiring palletization of cartons for non-Standard (i.e products that are not and can not be folded down to an 8.5 x 11 size without destroying the functionality or integrity of the product) IRS products should be stacked using this 15 tier method.

9 tier stacking method



Products that are 8.5 x 11 or can be folded to those dimensions are considered standard IRS products and should be stacked using this 9 tier method.

Exhibit #6**Sample of UPS Quantum View Notify Email generated from File:**