

# Invitation to Bid #19PSX0208

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## PRINTING: CHECK WRITING AND MAILING SERVICE FOR DEPARTMENT OF REVENUE SERVICES

Contract Specialist: **Teresa Dupont**

Date Issued: **4 September 2019**

Due Date: **26 September 2019 at 2:00 PM Eastern Time**

**Department of Administrative Services  
Procurement Division**



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# Invitation to Bid (ITB)

## PRINTING: CHECK WRITING AND MAILING SERVICE FOR DEPARTMENT OF REVENUE SERVICES

### Guide to Electronic Bid Submissions

#### 1. Introduction To BizNet

It is now a requirement of Department of Administrative Services (DAS)/Procurement Division that all companies create a Business Network (BizNet) Account and add their company profiles to the State of Connecticut BizNet system. Companies are responsible for maintaining and updating company information in their BizNet Accounts as updates occur. Companies that have been certified through the Supplier Diversity or the Pre-Qualification Program, have already created a BizNet account.

The BizNet login is: <https://www.biznet.ct.gov/AccountMaint/Login.aspx>

New Companies: Create an account by clicking the BizNet login link above and then the button on the right labeled "Create New Account". Login and select Doing Business with the State and Company Information. Please be sure to complete information in all tabs (Company Information, Accounts, Address, etc.).

Existing Companies Needing to Update Their Information: Login to BizNet and select Doing Business with the State and Company Information.

**Anyone having difficulty connecting to their account or downloading or uploading forms should call DAS/Procurement Division at 860-713-5095.**

#### 2. Business Friendly Legislation

As a result of Public Act 11-229, DAS/Procurement Division's goal is to make doing business with the State of Connecticut more business friendly. To eliminate redundancy, forms that were repetitively filled out with each invitation to bid are being automated in BizNet.

DAS/Procurement Division began the transition to on-line bidding by automating the submission of Affidavits and Non-Discrimination forms on October 1, 2011. Companies must submit forms electronically to their BizNet account if they haven't already done so. These forms must be updated on an annual basis, no later than 30 days after the effective date of any material change. Rather than completing them with each bid submittal, companies that have already filed these forms have the ability to view, verify and update their information prior to submitting a bid response.

#### **Instructions for Uploading Affidavits and Non-Discrimination Forms:**

**Click on the following link for instructions on how to upload Affidavits and Non-Discrimination forms:**

<https://portal.ct.gov/-/media/DAS/DAS-Procurement-Services/Contracting/Admin-Instructions.pdf?la=en>

(a) AFFIDAVITS

**THE FOLLOWING FORMS MUST BE SIGNED, DATED, NOTARIZED, UPLOADED OR UPDATED ON BIZNET. TO OBTAIN A COPY OF THESE FORMS, YOU MUST LOGIN INTO BIZNET AND FOLLOW THE INSTRUCTIONS LISTED ABOVE.**

- (1) OPM Ethics Form 1 – Gift & Campaign Contribution Certification
- (2) OPM Ethics Form 5 – Consulting Agreement Affidavit
- (3) OPM Ethics Form 6 – Affirmation of Receipt of State Ethics Laws Summary
- (4) OPM Form 7 – Iran Certification

For information regarding these forms, please access the Office of Policy & Management’s website by clicking on the following link: <http://www.ct.gov/opm/cwp/view.asp?a=2982&q=386038>

(b) NON-DISCRIMINATION

**CHOOSE ONE (1) FORM THAT APPLIES TO YOUR BUSINESS. COMPLETE AND UPLOAD OR UPDATE ON BIZNET ANNUALLY. TO OBTAIN A COPY OF THESE FORMS, YOU MUST LOGIN INTO BIZNET AND FOLLOW THE INSTRUCTIONS LISTED ABOVE.**

- (1) Form A – Representation by Individual (Regardless of Value)
- (2) Form B – Representation by Entity (Valued at \$50,000 or less)
- (3) Form C – Affidavit by Entity (RECOMMENDED) (Valued at \$50,000 or more)
- (4) Form D – New Resolution by Entity
- (5) Form E – Prior Resolution by Entity

For information regarding these forms and on which form your company should complete, please access the Office of Policy & Management’s website by clicking following link:

[http://www.ct.gov/opm/cwp/view.asp?a=2982&q=390928&opmNav\\_GID=1806](http://www.ct.gov/opm/cwp/view.asp?a=2982&q=390928&opmNav_GID=1806)

### **3. Online Bid Responses**

Any Invitations to Bid (ITB) posted by DAS/Procurement Division must be submitted electronically. The common forms listed below have also been automated in the BizNet system. In addition, specific forms are now web based and fillable, as noted below. To complete forms; download them from your BizNet account, complete your submittal response, and then upload these completed documents (as well as any other required submittal documents) through BizNet prior to the date and time upon which the Bid is due pursuant to this ITB. Late submissions will not be accepted. All bid responses submitted must be e-signed. Bid responses that are not e-signed are not received by DAS/Procurement and cannot be viewed or considered. If any required documents have not been uploaded, the system will not allow you to e-sign. After successful e-signature, Bidders will get a confirmation that their bid has been successfully submitted. If you do not receive this electronic confirmation, please contact DAS/Procurement at 860-713-5095. Bid pricing will be available for public viewing for 24 hours after bid closing.

- Contractor Information/Electronic Signature Page – Web Based fillable Form
- Employment Information Form (DAS-45) – Web Based fillable Form
- Statement of Qualifications (DAS-14) – PDF Fillable Form
- Connecticut Economic Impact Form (DAS-46) – Web Based fillable Form
- Contract Exhibit B – Price Schedule
- Bid Addendum (SP-18) – if applicable

Additional forms such as those listed below must be reviewed carefully and accepted by the bidder prior to bid submittal:

- Standard Terms and Conditions (SP-19)
- Invitation to Bid Document (SP-22)
- Invitation to Bid Contract (SP-50)
- Contract Exhibit A – Description of Goods & Services and Additional Terms & Conditions
- Contract Exhibit C – Notice to Executive Branch State Contractors and Prospective State Contractors of Campaign Contribution and Solicitations Limitations

#### 4. Insurance Accord Certificates

Contractors are responsible for maintaining their BizNet account with new and/or updated insurance information.

The following documentation will need to be uploaded to each company's BizNet account and evidencing that the State of Connecticut is an additional insured:

- (a) Certificate of Insurance (Accord Form)
- (b) The insurance policy declaration page
- (c) The additional insured endorsement to the policy

Training documentation relating to the completion of the above-reference forms is available through the DAS Website under "DAS Business Friendly Initiatives" at the following website: <https://portal.ct.gov/-/media/DAS/DAS-Procurement-Services/Contracting/Upload-Instructions.pdf?la=en>

***Bidders are cautioned that there may be additional documents, attachments or requirements depending on the complexity of the bid. Please read ALL bid documents carefully and provide all required information. Failure to do so may result in rejection of your bid.***

## Overview

The State of Connecticut Department of Administrative Services ("DAS") is issuing this Invitation to Bid for PRINTING: CHECK WRITING AND MAILING SERVICE FOR Department of Revenue Services ("DRS") as per the specifications listed in Exhibit A of this solicitation.

Due to the necessary interaction between the successful bidder and DRS, prospective bidders must be within a 150-mile radius of the DRS Office located in Hartford, CT.

The contract resulting from this bid will replace contract award in part or in total: 14PSX0157 which has an estimated of spend of \$247,000.00 to date.

The contract will be in effect from the January 1, 2020 through December 31, 2024.

As this is a bid, there are no negotiations. Terms and conditions cannot be changed and pricing shall be listed as specified only – no additional charges are permitted.

## Scope

Bidders must have the ability to process 425,000 to 450,000 DRS refund checks annually starting January 1, 2020. Checks must be laser imaged with variable information on 8-1/2" x 11" #24 white stock with a horizontal clean edge perforation and inserted into a standard security tinted #10 envelope to ensure privacy of the checks.

Listed below is a breakdown of the percentage of the volume as anticipated by the Department of Revenue Services:

### Estimate on refund checks

425,000 -- 450,000

January = 3%  
February = 23%  
March = 20%  
April = 25%  
May = 9%  
June = 3%  
July = 3%  
August = 3%  
September = 3%  
October = 5%  
November = 2%  
December = 1%

Bidders shall supply the company name, address and contact information of no less than three (3) major check **writing accounts with which they are currently doing business. These accounts must be of comparable volumes to that of this contract**, form complexity and time constraints. This information will be supplied on the SP-14 Bidder Qualifications.

Bidders shall supply to the DRS, the name(s) and phone number(s) of the appropriate individual(s) for an immediate response to problems and inquiries, and, if necessary, supply a written response to those inquiries within 24 hours. This information will need to be provided on the SP-16 Price Schedule.

Bidders shall have at least five (5) years' experience in the area of check and statement printing and must have maintained an organization capable of performing the work hereinafter described, in continuous operation for a minimum of the past five (5) years.

Bidders are required to fill out the Exhibit D, Security and Confidentiality Questionnaire and Required Documents, and Exhibit E DRS Requirements for Safeguarding Confidential Taxpayer Information.

# Instructions to Bidders

## 1. Bid Schedule

RELEASE OF ITB:	Date:	4 September 2019
RECEIPT OF QUESTIONS:	Date:	18 September 2019, by noon Eastern Time
ANSWERS TO QUESTIONS POSTED AS ADDENDUM:	Date:	19 September 2019
BID DUE DATE:	Date:	26 September 2019 at 2:00 PM Eastern Time

## 2. Pre-Bid Meeting Requirements:

This bid contains no pre-bid meeting requirements.

## 3. Questions:

Questions for the purpose of clarifying this bid must be received no later than the date and time specified in Section I, "Bid Schedule" and must be directed to the Contract Specialist, Teresa Dupont via email: [teresa.dupont@ct.gov](mailto:teresa.dupont@ct.gov).

## 4. Communications

During the period from your organization's receipt of this ITB, and until a contract is awarded, your organization shall not contact any employee of the State of Connecticut concerning this procurement except in writing directed to the Contract Specialist, Teresa Dupont via email: [teresa.dupont@ct.gov](mailto:teresa.dupont@ct.gov).

## 5. Public Bid Opening

Public bid openings are now conducted online. Bid pricing submitted will be available for public view through your BizNet Account and is available for 24 hours after the bid due date and time.

### How to View Bid Results:

- Go to the DAS/Procurement website: [http://www.biznet.ct.gov/SCP\\_Search/Default.aspx?Acclast=2](http://www.biznet.ct.gov/SCP_Search/Default.aspx?Acclast=2)
- Click on the heading "Current Solicitations"
- Click radio button "Under Evaluation"
- Search for the bid
- Click on "Public Opening" under the bid due date and time

# Bid Requirements

## 1. Quantities and/or Usages

Any quantities set forth in this ITB are estimated quantities and/or usages only and in no way represent a commitment and/or intent to purchase any particular amount. Actual quantities may vary and will be identified on individual purchase orders issued by the requesting entity.

## 2. Lowest Responsible Qualified Bidder; Micro Business Preference

The contract resulting from this ITB will be awarded to the lowest responsible qualified bidder. The qualities of articles to be supplied, their conformity with the needed specifications, their suitability to the requirements of the State government and the delivery terms will be taken into consideration, and the life-cycle costs and trade-in or resale value of the articles may be considered where it appears to be in the best interest of the State. In determining the lowest responsible qualified bidder, a price preference of up to ten per cent (10%) may be given for the purchase of the goods or services from micro businesses, or up to fifteen per cent (15%) in the case of "veteran-owned" (as described below) micro businesses. Micro business means a business with gross revenues not exceeding three million dollars (\$3,000,000) in the most recently completed fiscal year.

To be considered for the ten percent (10%) price preference, bidders must submit prior to the bid due date a copy of their Internal Revenue Service tax return form for the most recently completed fiscal year, confirming the amount of their gross revenues for that fiscal year. Failure to provide such tax return prior to the bid due date will deny bidder consideration for the ten per cent (10%) price preference. For bidders who have not yet filed their tax return for the most recently completed fiscal year, in lieu of a tax return, a letter from a Certified Public Accountant attesting to the bidder's gross estimated revenues for the most recently completed fiscal year will be accepted.

To be considered for the fifteen per cent (15%) price preference, bidders must submit prior to the bid due date a copy of their current certification from the Connecticut State Department of Veteran Affairs as to both "veteran-owned" and "micro business" status. "Veteran-owned" micro business means a micro business of which at least fifty-one per cent (51%) of the ownership is held by one or more "veterans" of the "armed forces." In accordance with Section 27-103(a) of the Connecticut General Statutes, "veterans" means any person honorably discharged, or released under honorable conditions, from active service in the armed forces and "armed forces" means the United States Army, Navy, Marine Corps, Coast Guard and Air Force and any reserve component thereof, including the Connecticut National Guard. Interested bidders may obtain the Certification Application by visiting: [www.ct.gov/ctva](http://www.ct.gov/ctva) and selecting "Veteran Owned Micro Business" option. Failure to provide such certification prior to the bid due date will deny bidder consideration for this price preference.

## 3. Stability of Bid Prices

Any price offerings from bidders must be valid for a period of 30 days from the due date of the bid.

## 4. Amendment or Cancellation of the ITB

DAS reserves the right to cancel, amend, modify or otherwise change this ITB at any time if it deems it to be in the best interest of the State to do so.



**5. Bid Modifications**

No additions or changes to any bid will be allowed after the bid due date, unless such modification is specifically requested by DAS. DAS, at its option, may seek bidder retraction and/or clarification of any discrepancy or contradiction found during its review of bids.

**6. Bidder Presentation of Supporting Evidence**

Bidders must be prepared to provide any evidence of experience, performance, ability, and/or financial surety that DAS deems to be necessary or appropriate to fully establish the performance capabilities represented in their bids.

**7. Bidder Demonstration of Services and/or Products**

At the discretion of DAS, bidders must be able to confirm their ability to provide all services bid. Any required confirmation must be provided at a site approved by DAS.

**8. Erroneous Awards**

DAS reserves the right to correct inaccurate awards.

**9. Bid Expenses**

Bidders are responsible for all costs and expenses incurred in the preparation of bids and for any subsequent work on the bid that is required by DAS.

**10. Ownership of Bids**

All bids shall become the sole property of the State and will not be returned.

**11. Ownership of Subsequent Products**

Any product, whether acceptable or unacceptable, developed under a contract awarded as a result of this ITB shall be the sole property of the State unless otherwise stated in the contract.

**12. Oral Agreement or Arrangements**

Any alleged oral agreements or arrangements made by bidders with any State agency or employee will be disregarded in any State bid evaluation or associated award.

## Award Criteria

Pursuant to CGS 4a-59 and DAS Procurement Regulations 4a-52-8 and 4a-52-18, the award shall be made to the lowest, responsible qualified bidder. The following factors, in descending order of relative importance, will be considered in the evaluation to determine the lowest, responsible qualified bidder:

- (a) Pricing
- (b) The conformity of the supplies, materials, equipment or contractual services to the specifications
- (c) Bidder's past performance
- (d) Bidder's financial responsibility

DAS may award by individual item, group of items, or the entirety of all items. DAS may also reject any and all bids in whole or in part, and waive minor irregularities and omissions if, in the judgment of DAS, the best interest of the state will be served.