**ATTACHMENT B**

**NYSLRS MEMBER ANNUAL STATEMENT (MAS)**

**BID**

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| **Bidder Name:** |  | | |
| **Contact Name:** |  | | |
| **Contract Phone & Email:** |  | | |
| Note: The following pricing must correspond to the specifications listed in Attachment A for the 2023 MAS. Subsequent years will be based on the pricing provided plus any permitted escalation as described below. | | | |
| **Paper Stock** | | | |
| **Item** | **Maximum Quantities** | **Unit Price** | **Total** |
| Envelope Stock\* | 675,000 | $ /M | $ |
| Paper Stock\* | 2,025,000 | $ /M | $ |
| \*Pricing for envelope and paper stock is firm for the 2023 MAS. For subsequent years, unit pricing for envelope and paper stock will be subject to increase or decrease based on the change in the Producer Price Index, Table 9, Pulp, Paper and Allied Products line, for the preceding 12-month period. | | | |
| **Services** | | | |
| **Item** | **Estimated Quantities** | **Unit Price** | **Total** |
| Printing envelopes\*\* | 675,000 | $ /M | $ |
| Printing Statements (all operations except programming)\*\* | 675,000 | $ /M | $ |
| Programming and processing of Statement data\*\* | 675,000 | $ /M | $ |
| \*\*Pricing for the services above is firm for the 2023 MAS. For subsequent years, unit pricing will be subject to increase or decrease based on the change in the Consumer Price Index, All Urban Consumer – Northeast for the preceding 12-month period, or 5%, whichever is less. Rates for services should exclude envelope and paper stock costs. | | | |
| **Price decreases or discount increases are permitted at any time.**  **NOTE: Do not include the price of postage in your bid. Price must include all customs duties and charges and all costs necessary or incidental to the proper execution of the services, including, but not limited to, pre-sorting and delivery fees.** | | | |

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| **Subcontracting** | | | |
| Will Bidder be subcontracting the printing of the envelopes and/or mailing for this job?  If “YES,” complete the table below.  **Note: Subcontracting of the printing and insertion of the Statement is NOT allowed.** | | | Yes  No |
| **Item Being Subcontracted** | **Subcontractor Name** | **Subcontractor Address** | |
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| **Minimum Qualifications** | | |
| Identify whether Bidder meets any of the business categories described (check all that apply): | A Minority- or Woman-Owned Business Enterprise (M/WBE) certified by the NYS Empire State Development Corporation  A Service-Disabled Veteran-Owned Business certified by the NYS Office of General Services  A NYS small business that meets all four criteria below:   * Resident in New York State; * Independently owned and operated; * Not dominant in its field; and * Employs one hundred or less persons. | |
| 1. Bidder is a bona fide printing vendor possessing digital one-pass printing equipment (digital press, inkjet web, thermal inkjet or laser) of producing a print job of at least 2,000,000 sheets, and must provide a list of equipment owned by, or available to, the Bidder. | | Yes  No |
| Using the space below, provide a list of equipment owned by, or available to, the Bidder to validate the statement above. | | |
| 1. Bidder has knowledgeable in-house IT/technical staff capable of programming and producing a complex, variable data Statement, and has verified this by listing one print job, using the References section of Attachment B, completed by Bidder within the last two years that included full-color printing, nested IF/ELSE logic, variable paragraphs, and at least 80 data points. | | Yes  No |
| 1. Bidder has included with its response a print sample from the project that Bidder identified in Minimum Qualification B. Sample includes variable data that is formatted consistently, and a mark-up showing which content was provided in .csv format. | | Yes  No |
| 1. Bidder will use Secure File Transfer Protocol (SFTP) to transfer the files. See Data Control/Security Information section in Attachment A (Project Specifications and Performance Standards). All Data Contract/Security specifications are **required**. | | Yes  No |
| 1. Bidder will use automated tracking services for mail. | | Yes  No |
| 1. With its response, Bidder has provided three client references for whom Bidder has provided printing services (see References section of Attachment B). One reference is from the client of the printing job identified in Minimum Qualification B above. | | Yes  No |
| 1. Bidder has provided a list of all New York State governmental agencies to whom the Bidder has provided printing services in the prior 24-months (see Attachment B – New York State Agency References). If Bidder has not provided printing services to a New York State governmental agency within the last 24-months, or all such agencies are already identified in the References section of Attachment B, select “N/A.” | | Yes  No  N/A |
| 1. Bidder certifies that it can and will comply with the requirements of Attachment A (Project Specifications and Performance Standards). Deviations from the printing process or substitutions of the materials described in Attachment A are not acceptable other than a substitution of the paper stock, as permitted in Attachment A.   If Bidder is electing to propose a substitute paper stock, the Bidder has identified the brand below and has submitted a sample of the proposed substitution paper stock with its response. If approved, Bidder will use the same paper stock for its proofs, as outlined in Attachment A. The Bidder will print all Statements on the same paper stock approved by OSC. | | Yes  No |
| Proposed Substitute Paper Stock (if applicable): |  | |

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| **Preferred Qualifications** | | |
| Strong consideration will be given to vendors whose production facility is located within a 250-mile radius of 110 State Street, Albany, NY, with additional consideration given to vendors whose production facility is located within a 50-mile radius of this address.  Provide the location of the production facility that would complete the printing of the Statements below. | | |
| Production Facility Address: |  | |
| Bidder has an in-house USPS postal facility. | | Yes  No |
| Bidder is Forest Steward Council (FSC) certified. | | Yes  No |
| Bidder has an in-house envelope press. | | Yes  No |

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| **General Client References** | |
| Provide the following information for each reference submitted (see Minimum Qualification F above).  Fields will expand as you type.  **IMPORTANT:** Bidder must validate Minimum Qualification B by identifying the print job and reference below for “Reference Company #1.” | |
| Reference Company #1: |  |
| Contact Person: |  |
| Address: |  |
| City, State, Zip: |  |
| Telephone Number: |  |
| Email Address: |  |
| Number of years Bidder has provided services to this entity: |  |
| Date(s) of print job being used to satisfy Minimum Qualification B: |  |
| Description of programming complexity of print job used to satisfy Minimum Qualification B, including number of data points involved: |  |
| Reference Company #2: |  |
| Contact Person: |  |
| Address: |  |
| City, State, Zip: |  |
| Telephone Number: |  |
| Email Address: |  |
| Number of years Bidder has provided services to this entity: |  |
| Description of print jobs provided (e.g., volume, programming complexity): |  |
| Reference Company #3: |  |
| Contact Person: |  |
| Address: |  |
| City, State, Zip: |  |
| Telephone Number: |  |
| Email Address: |  |
| Number of years Bidder has provided services to this entity: |  |
| Description of print jobs provided (e.g., volume, programming complexity): |  |

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| **NYS Agency References** | |
| Provide the following information for each NYS agency to whom Bidder provided printing services to in the past 24 months (see Minimum Qualification F.i above).  Fields will expand as you type. Add additional reference sections as necessary. | |
| NYS Government Agency #1: |  |
| Contact Person: |  |
| Address: |  |
| City, State, Zip: |  |
| Telephone Number: |  |
| Email Address: |  |
| Number of years Bidder has provided services to this entity: |  |
| Description of print jobs provided (e.g., volume, programming complexity): |  |
| NYS Government Agency #2: |  |
| Contact Person: |  |
| Address: |  |
| City, State, Zip: |  |
| Telephone Number: |  |
| Email Address: |  |
| Number of years Bidder has provided services to this entity: |  |
| Description of print jobs provided (e.g., volume, programming complexity): |  |
| NYS Government Agency #3: |  |
| Contact Person: |  |
| Address: |  |
| City, State, Zip: |  |
| Telephone Number: |  |
| Email Address: |  |
| Number of years Bidder has provided services to this entity: |  |
| Description of print jobs provided (e.g., volume, programming complexity): |  |

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| **Bidder Signature** |
| **By my signature I affirm under penalty of perjury that I am duly authorized to legally bind the Bidder referenced above and I sign this Bid as the legally binding act of the Bidder.** |
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| **Typed or Printed Name of Authorized Representative of the Bidder** |
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| **Title/Position of Authorized Representative of the Bidder** |
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| **Signature of Authorized Representative of the Bidder** |
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| **Date** |