

BIDS SHALL BE PUBLICLY OPENED AT 11:00 A.M., PREVAILING WASHINGTON, D.C. TIME, ON SEPTEMBER 29, 2008.

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

SPECIFICATIONS - U.S. Government Printing Office (GPO), Washington, D.C.

GPO CONTRACT TERMS: Any contract which results from this Invitation for Bid will be subject to GPO Contract Terms (GPO Publication 310.2, effective December 1, 1987 (Rev. 6-01)) and Quality Assurance Through Attributes Program for Printing and Binding (GPO Publication 310.1, effective May 1979 (Rev8-02)).

CAUTION: The forms printed under this contract are coded and they must not be mixed with forms printed under any other contract.

SPECIFICATIONS FOR CONTRACT PRINTING AND BINDING OF THE TFOP PLAN FORMS (3) FULL CARTONS FOR TAX YEAR 2008

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SCOPE: These specifications cover the printing and trimming of four two-page forms, estimated total quantity of 48,210,000. The four items are to be packed with Document 7425 into an estimated 16,070 cartons; computer imaging/addressing labels;

palletizing; packing; storing; assembling by Zip Code (staging); and turnover ship/mail.

NOTE: Due to the numerous exhibit pages in this specification, the exhibits will not be accessible via the Internet. A complete copy of the specifications including exhibit pages may be obtained by contacting GPO's bid room @ (202) 512-0526.

CHANGES IN QUANTITY: The Government, for the FINAL QUANTITY, may submit increases or decreases of up to 25% in the total quantity for each item shown in Exhibit 1 until the date specified in the schedule. These quantity adjustments may be made via e-mail/FTP and will be the FINAL quantity. These adjustments will not change the scheduled turnover dates. Billing adjustments for scheduled quantity changes (+ or -) will be at the contractor's quoted "ADDITIONAL RATE". (See Offers Section) If no changes have been received by the scheduled date for final quantity adjustments, the bid quantities will stand as the FINAL contract quantity.

NOTE: Must be full Final Quantity to all consignees. **No** shortages will be allowed. However, the Government reserves the right to accept or reject overages (See Section 1.6).

SUBCONTRACTS: The provisions of the article entitled "Subcontracts," GPO Pub 310.2 is amended to permit subcontracting of label printing. NOTE: Prime contractor is responsible for monitoring and the quality of the work performed by subcontractors.

Section 1 - SCHEDULE

<u>Date</u>	<u>Event</u>
09-29-2008	Bid opening.
10-14-2008	Award of contract (Purchase Order Number By Telephone).
10-24-2008	Contractor to provide Production and Quality Plans to GPO via traceable means.
10-24-2008	Test address file via email to contractor. (Section 4.2)
Negotiated	Preproduction Conference at contractor's plant or via telephone. (Section 1.2)
11-17-2008	Final address file via FTP/email to contractor (final quantity).
11-17-2008	Electronic media for forms via e-mail to contractor
11-17-2008	Contractor must provide the individual weight of each product via email to mary.g.kruemmel@irs.gov
12-05-2008	Start ship date. (On or before)
12-19-2008	Ship complete date.

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 event, the schedule will be adjusted in accordance with contract terms.

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

1.1 PREAWARD PLANT SURVEY: may be conducted by the Government Printing Office and the Internal Revenue Service personnel to determine if the prospective contractor (and the subcontractors) has adequate facilities and expertise to accomplish the requirements of these specifications.

1.2 PREPRODUCTION CONFERENCE: A preproduction conference may be held at the contractor's plant as indicated in the schedule. The purpose of the conference will be to discuss and review all aspects of the contractor's internal and external operations required to complete this contract. The contractor will conduct this preproduction conference and items to be discussed are:

- 1) Processing and sorting electronic address files, as well as the security of the address 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
- 6) Specific production dates of all subcontractors
- 7) How the product will be staged and/or shipped
- 8) Any other special requirements which are specific to this contract.

Attending this meeting will be representatives from the Internal Revenue Service and there MAY be representatives from the Government Printing Office. To establish coordination of all required operations, a representative of all subcontractors involved should also be present as well as representatives from each involved production area for the primary contractor.

1.3 QUALITY SYSTEMS AUDIT: In connection with the preproduction conference, should the Government elect, a quality systems audit would be conducted. Following the conference, IRS/GPO may conduct an in-depth audit of all contractor quality control methods, quality systems and quality plans in a formal walk-through review of the previously approved written plan. This audit would require the contractor to plan, in advance, all quality related functions which would be required to complete the contract. Should subcontractors be involved, a complete audit of their quality systems may also be performed. This procedure will be mandatory for all contractors doing IRS Tax Package work for the first time.

Failure to maintain the quality systems in accordance with the contractor's plan approved by the Government, may result in the Government's termination of the contract for default.

1.4 INSPECTION NOTIFICATION: Seventy-two (72) hours prior to press, addressing, and mailing operations the contractor must e-mail to Betty.J.Howard@irs.gov and Mary.G.Kruemmel@irs.gov Form 9558 "Quality Inspection Notification" (Fillable PDF to be furnished to the contractor, See Exhibit 8) with the following information:

- 1) Jacket and Requisition Numbers
- 2) Name of company
- 3) Location and address of inspection site
- 4) Name and phone number of contact person
- 5) Date and time of inspection

Whether IRS elects to be present for the inspection, or waive the inspection, you will be notified at least 24 hours prior to the time for inspection. If IRS fails to respond, proceed as you would have, had there not been an inspection. **If the press inspection is waived, the contractor is required to send 5 press sheet samples overnight to IRS, Attn: Gayle Kruemmel, 5000 Ellin Road, Room C8-348, Lanham, MD, 20706.** Attendance at, or waiver of, the inspection does not affect any other provisions of the contract. Do not hold up production unless specifically authorized by the GPO.

1.5 DAILY PRODUCTION REPORT: The contractor must provide daily production information required to complete Form 9659 "Commercial Mailing Production Report" (See exhibit 5). The coordinator will transmit this report every workday to IRS National Office via Internet. In the absence of the coordinator, the contractor must transmit the report to mary.g.kruemmel@irs.gov. THE GOVERNMENT WILL KEEP ALL PRODUCTION DATA, etc., IN STRICT CONFIDENCE.

1.6 EXCESS AFTER PACKING AND TURN OVER: Contractor is to notify the GPO IRS Desk at 202-512-2044 if there are any overs after complete distribution. The government may elect to dispose of, or accept, all or a portion of the overs. If the government elects to accept overs they must be packed in cartons, labeled with an IRS carton label (See Exhibit 1), and placed on pallets that conform to Federal Specs NN-P-71C, and any amendments thereto except for dimensions (as shown under Exhibit 2) and single center stringer. Full entry must be on the 40" width. Strict adherence to these dimensions is necessary to accommodate storage requirements of IRS distribution centers. Pallet height is not to exceed 55", including pallet. Forms A, B, C, and D must be packed separately, 3,000 per carton. DO NOT PACK Document 7425 (See Exhibit 3) with the overs. Unaccepted overs must be disposed of at the direction of the Government.

1.7 ELECTRONIC DISTRIBUTION/SHIPPING REPORT (Form 2040): The contractor must update the Electronic Form 2040 "Distribution/Shipping List" (see exhibit 6). The contractor must complete and e-mail Form 2040 to the IRS each day the products ship. **Any delay or missed input could result in delay of payment.** The contractor is responsible for the verification and correctness of information supplied back to IRS. If any information is missing or incorrect, please contact Gayle Kruemmel on 202-283-0228.

1.8 POSTAGE STATEMENTS/IRS POSTAL FORMS: The contractor *must* update the Electronic Form 13456 and submit via email to IRS at postage@publish.no.irs.gov and also email to mary.g.kruemmel@irs.gov within three (3) workdays of completion of the mailing. For your convenience, Form 13456 is provided as a fillable PDF file for each GPO job jacket. The IRS will complete the top portion of the form prior to emailing the form to the contractor. If any information is missing or incorrect, contractor must contact Gayle Kruemmel on 202-283-0228.

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

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

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

Faxing USPS Postage Statements: On the same day the completed Form 13456 is emailed, the contractor is also required to FAX all associated postage statement forms to the IRS. Contractor is required to FAX postage statement forms (i.e. USPS Form 3602, 3602-R, 3600) that have received a barrel stamp from the postal service to 1-267-295-7877 and also to 1-202-283-7432 Attn: Gayle Kruemmel (not a toll free number). The first page of every FAX sent to the IRS must be a fully completed IRS Form 13456-A. The number of pages faxed may not exceed 32 pages in any single FAX transmission. The fax must contain only postage statements for the designated GPO jacket number. Contractor must not combine postage associated to multiple GPO contracts in a single FAX transmission.

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

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

Within three (3) workdays of completion of mailing, contractor must ship via overnight, traceable means, one complete set of all 13456s’ and barrel date stamped postage statements to: IRS/New Carrollton Federal Building (NCFB), SE:W:CAR:MP:P:B:T, 5000 Ellin Road, Lanham, MD, 20706-1348, Attn: Gayle Kruemmel, C5-370. Contractor’s option, scan this material onto a cd in an Adobe pdf format.

SECTION 2 – MATERIALS

2.1 FURNISHED BY THE GOVERNMENT:

- 1) *PDF files for Instruction pamphlets
- 2) Electronic dist. lists for TFOP addresses via FTP/e-mail (Government’s option)
- 3) *IRS Carton label
- 4) Government Bill’s of Lading
- 5) *Form 13456, “IRS Publishing – Postage Report” and Form 13456-A “IRS Publishing Postage Statement–FAX Cover Sheet”. Both forms to be provided via email in a fillable PDF file format
- 6) *Form 2040 in a PDF fillable Adobe Acrobat 6.0 file format provided via e-mail
- 7) USPS Form 3615, Mailing Permit Application and Customer Profile;
- 8) *Document 7425

***Note:** At government's option, electronic transfer will be via e-mail or File Transfer Protocol (FTP) or Windows formatted 1.44 Megabyte floppy disk, Zip Disk or CD RW disk in Portal Document Format (PDF) generated from Adobe Acrobat 7.0 or later (We will supply a color composite PDF file, and all fonts will be embedded in the files at the PDF level). **Do not unembed fonts!** This may result in a loss of data. The PDFs are backward compatible to Adobe Acrobat 5.0. Prior to image processing the contractor is responsible for checking files to insure that such features as bleeds, register marks, and correct file output selection have been provided for, so as to correctly output for printing. The contractor must supply necessary trapping. High-resolution image processors must be used if generating films. The contractor must verify the accuracy of the Postal barcodes, output as part of the envelope printing, with the USPS.

ELECTRONIC FILES: TFOP distribution and record layouts files are created on an IBM platform. Files created in Excel format and ZIP code sorted. USDA files will be in Microsoft Excel sorted by State.

DISPOSITION OF FURNISHED MATERIALS: All materials supplied by the IRS must be returned by a traceable means at contractor's expense, to: Internal Revenue Service, 5000 Ellin Road, Lanham, MD 20706, Attn: Gayle Kruemmel, C5-370, SE:W:CAR:MP:P:W:T.

2.2 FURNISHED BY CONTRACTOR: All other materials and operations necessary to fulfill the contract requirements, including telephone, facsimile transmission capability, personal computer, internet access and the following:

For completing Form 2040 "Electronic Daily Distribution/Shipping Report", the contractor is required to have Internet access provided through an Internet Service Provider (ISP), an e-mail account and a web browser equivalent to Internet Explorer 6.0 or Netscape 4.0. In addition, the contractor is required to have Adobe Acrobat 7.0 (or higher) software (not Adobe Reader). The contractor must furnish an e-mail address for the IRS to e-mail the form mentioned above.

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

Items (A) thru (D) - White Offset Book Paper, basis weight: 50 lbs. (per 500 sheets, 25 x 38"), must equal JCP Code A60 or A70.

Item (E) - White, Yellow, Writing Paper, basis weight: 18 or 20 lbs. (per 500 sheets, 17 x 22"), must equal JCP Code D10.

Label - White Latex Impregnated label, basis weight: 60-70 lbs. (per 500 sheets, 25 x 38").

SECTION 3 – FORM SPECIFICATIONS

3.1 ITEMS:

<u>Item Number</u>	<u>Item Name</u>	<u>Catalog Number</u>
(A)	F 1040	11320B
(B)	F 1040 A	11327A
(C)	F 1040 EZ	11329W
(D)	F 1040 A&B	11320X
(E)	D7425	10778L

3.2 QUANTITY (estimated):

Item (A)	13,257,000
Item (B)	12,801,000
Item (C)	12,801,000
Item (D)	9,351,000
Item (E)	16,070

3.3 PRINTING:

Items (A) and (D) print face and back in **Black and PMS 3005(Blue)**. The blue printing is a screened background equal to 10% tone of 110 line screen (may be simulated).

Items (B) print face and back in **Black and PMS 185(Red)**. The red printing is a screened background equal to 15% tone of 110 line screen (may be simulated).

Item (C) prints face and back. **Face prints Black and PMS 338(Green). Back prints in black ink only.** The green printing is a 15% tone of 110 line screen (may be simulated).

Item (D) prints face and back in **Black ink only**.

Item (E) prints face only in **Black ink only**.

Registration: Registration must be $\pm .02$ " both horizontally and vertically, between the Black and Green/Red ink colors

3.4 TRIM SIZE: Items (A) thru (D) 8 x 10-7/8" to 11"; Item (E) 8-1/2 x 5-1/2". Trim 4 sides, center image.

3.5 DOCUMENT 7425 (Item E): Insert one (1) copy inside each carton on top of the printed material. (See exhibit 4.)

3.6 GPO IMPRINT: Contractor must set a GPO imprint line and insert on each item contractor prints, in accordance with Contract Terms, GPO Publication 310.2, page 9.

3.7 PROOFS (Items A thru D): Contractor must submit 2 sets of Dylux, or similar proofs for each item. At contractor's option, digital proofs created using the same Raster Image Processor (RIP) that will be used to produce the product may be furnished. Proofs provided must be of 1200 DPI Resolution or better. Proofs must be printed on the actual production stock and must be 2-sided, trimmed and folded to replicate finished product. Submit proofs as soon as the contractor deems necessary in order to comply with the contract schedule. Proofs will be withheld 3 workdays from receipt in the IRS until they are made available for pickup by the contractor. Contractor is not authorized to print prior to his receipt of an approval or conditional approval. Do not return electronic media with proofs.

If any contractor's errors are considered serious enough in the opinion of GPO, revised proofs may be required and are to be provided at no additional expense to the Government. No additional time will be allowed for this reproofing and such operations must be accomplished within the original production schedule allotted in this contract.

The jacket number and requisition number must be indicated on all containers and accompanying documentation.

Submit 1 proof for each item to: IRS, 5000 Ellin Road, Lanham, MD 20706, Attn: Gayle Kruemmel, C5-370, SE:W:CAR:MP:P:W:T.

Submit 1 proof for Items A and D to: IRS, 1111 Constitution Ave., NW, Washington, DC 20224, Attn: SE:W:CAR:MP:T:I:F, Kevin Coulter, Room 6423.

Submit 1 proof for Item B to: IRS, 1111 Constitution Ave., NW, Washington, DC 20224, Attn: SE:W:CAR:MP:T:I:S, Michael Young, Room 6423.

Submit 1 proof for Item C to: IRS, 1111 Constitution Ave., NW, Washington, DC 20224, Attn: SE:W:CAR:MP:T:I:F, Virginia Tarris, Room 6423.

SECTION 4 - PACKING AND TURNOVER OF SHIPMENTS (Small Package Carrier (SPC))

4.1 MAIL PACKING - See Exhibit 1 "Packing Requirements" for sample breakdown.

Approximately 48,210,000 total copies of four different forms to approx. 2,716 destinations, pack into approx. 16,070 cartons in quantities of 3,000 items per carton. Pack SOLID (allow for compression). Insert a *colored* separator between each different item in the package. Insert one (1) copy of Document 7425 (see section 3.5) into each carton on top of the printed material. Packages are to be securely sealed and labeled suitable for handling during shipping. For shipments to IRS, NDC, 1201 N, Mitsubishi Motorway, Bloomington, IL 61704-6613, the items must be packed separately in cartons (See Section 4.4); IRS Label F6153 affixed (See 4.3); and palletized (See Section 4.7).

Contractor to Furnish All Cartons: Cartons must be corrugated or solid fiber shipping containers, 1380 kPa (200 psi) minimum bursting strength. Bottom flaps may be glued, stapled, or sealed with polyester tape 2 to 3" width, minimum 12 kNm (65 lbs./inch) transverse tensile strength). If stapled, cartons must be stapled before packing and without damage to

pamphlets. Cartons are to be sealed at top with 2 to 3" paper or polyester tape (not reinforced).

NOTE: Shipments 10 lbs. and under must be packed in reinforced jiffy bags suitable for handling during shipping. Shipments over 10 lbs. must be packed in cartons NTE 32 lbs. when fully packed.

4.2 LABELING: In addition to the carton labels, address labels are required. The contractor must provide a sufficient quantity of address labels.

Label/Addressing: The contractor must create address labels on white label stock specified and image in black ink, up to 8 lines of output from the IRS furnished ASCII and Microsoft Excel file formats, and affix one address label per container.

Address Labels: IRS will supply electronic media via FTP/e-mail for imaging address labels by the date stated in the schedule. Contractor will have to manipulate text into a maximum of 8 lines per address. Labels must be addressed in a minimum 12 point sans serif type. Contractor must ensure the correct return address appears on the correct cartons/jiffy packs as indicated below.

Return Address: (Official Business, Penalty for Private Use, \$300 must appear on all containers shipping/ mailing via USPS or UPS.) Contractor must enter the appropriate return address on the furnished container label files.

The return address for Orders delivering to TFOP Outlets (such as Banks, Post Offices, Libraries, Prisons, etc...) will be: IRS, 4050 Alpha Rd 1420 MSRO, Farmers Branch, TX 75244-4203.

The return address for all Bulk Orders for the IRS, NDC will be: Internal Revenue Service, 1201 N. Mitsubishi Motorway, Bloomington, IL 61704-6613.

Test electronic distribution files: IRS will furnish an electronic test file via e-mail consisting of approximately 10 records. The information on the test file is being provided so that the contractor can program the information for placement in the applicable fields. Contractor must manipulate the test file and submit the records in an address label format, via e-mail to mary.g.kruemmel@irs.gov. Contractor will receive an approval/rejection of the test samples within two (2) workdays after receipt. If samples are rejected, contractor must submit additional samples for approval. NOTE: No additional time will be allowed in the schedule when additional samples are required.

4.3 IRS CARTON LABEL (Form 6153): In addition to the address label, a carton label must be SECURELY applied to one end of each carton. Copy will be supplied and it must be reproduced at 100%. This label is to identify the contents of the carton. (See Exhibit 1)

CAUTION: In the event that carton labels are not securely affixed to the cartons and/or contain incorrect information they will be considered mislabeled. Also, if the cartons are crushing, collapsing, and/or bursting, and it is determined that the cause is due to the cartons not being packed solid, or some other reason within the contractor's control, the contractor will be charged \$2.00 per carton for relabeling, repacking, and/or repalletizing.

4.4 CARTONS: Shipments delivering to IRS NDC and GPO – all items must be packed separately in shipping containers. Cartons must be corrugated or solid fiber shipping containers, 1380 kPa (200 psi) *minimum* bursting strength. Bottom flaps may be glued, stapled, or sealed with polyester tape 2 to 3" width, minimum 12 kNm (65 lbs. /inch) transverse tensile strength). If stapled, cartons must be stapled before packing and without damage to forms. Cartons are to be sealed at top with 2 to 3" paper or polyester tape (not reinforced).

4.5 COPIES DAMAGED IN TRANSIT: CONTRACTOR MUST REPLACE AND SHIP/MAIL ALL COPIES DAMAGED IN TRANSIT WITHIN 24 HOURS OF DEFICIENCY NOTIFICATION. CONTRACTOR WILL INCUR ALL CHARGES TO REPLACE AND SHIP/MAIL DAMAGED COPIES.

4.6 IRS RESIDENT COORDINATOR: One or more IRS representatives may be stationed at the contractor's and/or subcontractor's facility to provide project coordination in the receipt of cartridges, monitoring of the imaging, printing, binding, quality control sample selection, packing, staging, and distribution of the tax packages. These coordinators do not have contractual authority and cannot make changes in the specifications or contract terms but are to bring any and all defects they see to the attention of the company Quality Control Officer. These coordinators will have full and unrestricted access to all production areas where IRS work is being produced. **The contractor will furnish office space to include a desk, telephone, personal computer with CD Drive and internet access to send and receive e-mail. Personal computer must be loaded with Adobe Acrobat 7.0, and Microsoft Office 2003 for submitting reports. Access to a fax machine will also be required for the coordinators.** This space will be in an enclosed, secure area adjacent to the binding/ mailing operations. (The

contractor will have long distance charges reimbursed by the Government). Desk and telephone access are also required for a postal clerk during the turnover of packages to the Postal Service. The contractor and resident coordinator will conduct product sampling. The contractor must make (12) random daily pulls and the monitor (if on-site) will make (32) random daily pulls off each production line. These samples are outside the scope of any sampling the contractor may do as part of their own internal quality plan and must be captured as spoilage and put back into the mailing. The contractor must maintain storage of these samples for a warranty period of 120 days as outlined in GPO contract terms (See section 9.3). The coordinators are to receive a sample copy for every 3,000 run.

4.7 PALLETS: Pallets are required. Pallets must be type III and must conform with Federal Specifications NN-P-71C, and any amendments thereto except for dimensions (as shown under Exhibit 2) and single center stringer. Full entry MUST be on the 40" width. Strict adherence to these dimensions is necessary to accommodate storage requirements of IRS distribution center. 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 with a maximum height of 55", including pallet. Do NOT use metal strapping or pallet caps for securing material on pallets. There must be no more than one partial pallet per destination. Cartons shall be stacked on pallets using a reverse layer pattern, 9 cartons per layer. 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.

4.8 MAILING MANIFESTS: Contractor must provide mailing manifests on 2-part NCR paper. Part 1 is the USPS copy, and Part 2 is the contractor copy. Contractor must weigh at least 10 cartons from each packing plan to determine accurate carton weight for that individual packing plan. This procedure is both necessary and critical for providing an accurate manifest to the Postal Service for verification purposes. (See Section 1 "Schedule".)

4.9 TURNOVER TO COMMERCIAL CARRIER FOR DELIVERY TO BULK MAIL CENTERS (BMC's): Transportation to each BMC/ASF will be provided by IRS. The contractor will be required to drop ship quantities directly to the BMCs and ASFs. To accomplish, the contractor must prepare, implement, and submit electronically a detailed plant-verified drop shipment plan, the cost of which must be included in the contractor's total bid price. A separate charge will not be allowed for any administrative costs for preparing and implementing the drop shipment plan. Vendor must provide electronic copies of load plans within 2 days after completion date. The postal employee verifying the mail will provide a signed copy of Form 8125 Drop Shipment Clearance Document. The CONTRACTOR/MAILER will be responsible to ensure that this document travels with mail and that a copy of the IRS provided GBL is made available for examination upon the request of the postal service at the destination BMC/ASF.

- The contractor MUST submit its detailed plant-verified drop shipment plan for direct shipments to the BMCs /ASFs on or before the date in the schedule. The detailed plan must include the GPO jacket number and must be emailed to: fyator@gpo.gov, bill.c.bracken@irs.gov and also to mary.g.kruemmel@irs.gov. The plan must be basically in the format shown in Exhibit 11 to show the piece count, approximate weight, freight charges, and number of transit days for each shipment. IRS will supply the contractor with GBL's. The contractor must provide the scheduled dates for dropping at the BMCs/ASFs, etc.
- NOTE: If the contractor is having a problem with commercial carriers contact IRS Traffic, Bill Bracken at 972-308-1932.

4.10 SMALL PACKAGE CARRIER SHIPMENTS (SPC): The contractor will be required to ship via traceable means by IRS small package carrier. **The IRS will provide an IRS small package account number. Contractor must notify Gayle Kruemmel at 202-283-0228, at least 5 workdays prior to the first scheduled ship date to ensure a carrier 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 call IRS prior to the first ship date for clarification. One portion of the carrier tracing label will be required to be affixed to the left of the address label of each package. The shipper receipt portion of the tracing label must contain a complete street address. **Shipments destined outside the Continental United States must be made via the SPC second day air service. Addresses with P.O. Boxes and US Post Offices cannot ship by small package carrier; they must ship via U.S.P.S., Packing Services Parcel Post.**

Air Shipments: The contractor must contact the designated air freight carrier to coordinate all air shipments and ensure that pallets are accepted and that the maximum pallet weight is within that specific carrier's allowable weight limit. This must be done for each air ship destination. This will alert them to any restrictions the designated airport may have, especially if it is a small airport with limited floor-weight capacity. Over 500 lbs use air bills provided. Less than 500 lbs use UPS Air Express – Next or Second Day delivery.

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 GBL's for shipments to an individual destination exceeding a truckload. Only one bill of lading should be released for each truckload. Any extra GBL's should be returned to the IRS, NOT to the GPO.

Contractors are required to use a two-part manifest shipping report 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) consignee name; 2) complete consignee address; 3) zone; 4) weight; and 5) the matching shipper receipt portion of the traceable label. The original copy of the report should accompany the shipment.

Once shipping is complete, the contractor must submit a copy of the completed manifest shipping report. The contractor may submit the report as an Adobe pdf and furnished on a cd or email the report to mary.g.kruemmel@irs.gov.

If multiple small package carriers are to be used, an account number will be assigned for each carrier. Contractors are required to ship using the IRS designated carrier(s) and the assigned account number(s) or be responsible for any additional shipping costs.

NOTE: The contractor's must notify the small package carrier of the amount to be picked up in order for the carrier to provide adequate equipment for the pick up. Contractor must have the capability to generate UPS shipping labels electronically. It is the responsibility of the print contractor to be familiar with electronic shipping methods via UPS. There are many ways to generate electronic shipping labels, either through a UPS shipping system (UPS WorldShip System or UPS Internet Shipping) or a 3rd Party Shipping Software (Pitney Bowes Shipping Software, etc.). In addition to basic addressing requirements, UPS shipping systems provide two reference fields that are required to be used:

1. *Reference Field 1:* Government Printing Office (GPO) Jacket number, and
2. *Reference Field 2:* IRS Print Requisition Number

4.11 MOTOR FREIGHT SHIPMENTS: If needed, Government Bills of Lading will be furnished by the IRS.

4.12 PRIORITY MAIL SHIPMENTS: 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. Document 7425 (yellow insert, See Exhibit 3) is to be placed inside each carton on top of the printed material. Hand stamping of priority mail cartons is unacceptable.

4.13 TURNOVER OF PRIORITY MAIL SHIPMENTS: IRS priority mail will be entered/delivered to the contractor's local post office for mailing. Contractor will provide manifests for delivered permit mail labels. The contractor must prepare PS 3605 for turnover to the local postal authorities. The contractor to email their local post office zone rates for priority mail to mary.g.kruemmel@irs.gov for this mail to be accepted by USPS.

SECTION 5 - USPS REQUIREMENTS

5.1 USPS Regulations: The contractor must comply with all U.S. Postal Service regulations governing the preparation of Drop Ship Parcel Post rate mailings which are in effect at the time of the mailing, (or parcel post, for some bulk shipments), including the issuance of the required forms (mailing statements) and the weighing of shipments (mail manifests). **The contractor MUST meet with local postal authorities before the start of production to make arrangements for verification and DBMC Parcel Post manifest approvals.** (The Domestic Mail Manual has specific requirements regarding the minimum and maximum package sizes and must be adhered to by all mailers.) (The USPS Publication 401 has specific guidelines that must be adhered to regarding USPS approved DBMC mail manifests.)

5.2 Mail Verification: The Postal Service will verify mailing preparation, makeup, and postage totals at the point where mailings will be prepared and shipped. The contractor MUST apply to the Postal Service for a plant-verified drop shipment authorization (which is a letter submitted to the local post office).

The contractor MUST also obtain an authorization to palletize from the appropriate RCC. A PS Form 3856 must be submitted to the district manager customer service of the division serving the post office where the contractor's plant is located. The contractor should notify Postal authorities as soon as possible concerning this mailing. A 30 day allowance should be made for formal approvals before the date of the first mailing.

USPS Plant-Verified Drop Shipments: The contractor will be required to drop ship all mailed quantities directly to the BMCs and ASFs, and to accomplish this, must prepare and implement a detailed plant-verified drop shipment plan. Transportation to each BMC or ASF will be provided by IRS. The postal employee verifying the mail will provide a signed copy of Form 8125 Drop Shipment Clearance Document. The CONTRACTOR/MAILER will be responsible to ensure that this document travels with the mail and that a copy of the IRS provided GBL is made available for examination upon the request of the postal service at the destination BMC:

- On or before the date in the schedule, the contractor **MUST** submit its detailed plant-verified drop shipment plan for direct shipments to the BMCs and ASFs. The detailed plan must be submitted to the GPO and must be basically in the format shown in Exhibit 10 to show the piece count, approximate weight, and number of transit days for each shipment. The administrative costs of implementing the drop shipment plan are to be included in the contractor's bid price.
- The contractor must provide the scheduled dates for dropping at the BMCs and ASF, etc.
- Transportation to each BMC or ASF will be provided by IRS. The postal employee verifying the mail will provide a signed copy of Form 8125 Drop Shipment Clearance Document. The CONTRACTOR/MAILER will be responsible to ensure that this document travels with the mail and that a copy of the IRS provided GBL is made available for examination upon the request of the postal service at the destination BMC.

Deposit of Mail: Mailings will be made at Drop Ship Parcel Post postage rates. Accordingly, the U.S. Postal Service will require that each DBMC rate mailing be deposited at a time and location specified through an appointment procedure. The contractor/mailler will be responsible for scheduling the deposit of all DBMC rate mailings at least 5 workdays in advance by contacting the manager, logistics and distribution, or designee, at the designated BMC. The contractor/mailler must comply with the scheduled time.

5.3 Non-machinable Parcels: Parcels weighing over 25 pounds are not machinable and **MUST NOT** be palletized with machinable parcels. Pallets containing non-machinable mail must be labeled to each BMC or ASF as indicated in the Domestic Mail Manual regulations governing the use of Parcel Post.

The contractor must provide adequate space at the mailing facility for postal employees to perform the necessary verifications. IRS will not apply for plant load authorization or plant verified drop shipment, this will be the contractor's responsibility. It is also the responsibility of the contractor, or their mailer, to ensure that their mailing documentation is completed in a timely manner and submitted to all applicable USPS offices. NOTE: Contractor/Mailer should give 48 hours notice for pickup of full truckload shipments.

SECTION 6 – QUALITY ASSURANCE

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

- The Quality Systems shall assure the quality of components from subcontractors and subsidiary plants. This element includes assuring that components from different sources will be compatible **BEFORE** the start of production.
- The Quality Systems shall include procedures for assuring that all variable data are accurately and completely printed and that all addressed items are mailed. These procedures shall explicitly describe the methods to be used to assure that no records are missed or duplicated when an interruption of variable printing occurs (e.g., due to equipment malfunction).

The prime contractor shall submit, in duplicate, written outline plans of the Quality Systems and copies of the forms by the date in the schedule in Section 1. The plans shall be submitted to the Contracting Officer, U.S. Government Printing Office, Stop PPP, Room C-817, Attention: IRS Control Desk, 27 G Street NW, Washington, D.C. 20401 and also emailed to mary.g.kruemmel@irs.gov. The proposed Quality Systems Plans are subject to Government approval.

6.2 QUALITY SYSTEMS OFFICIAL: The prime contractor shall designate an official who shall monitor and coordinate the quality system. This official shall serve as the Government's single point of contact on quality matters during the life of the

contract. The name of the official shall be provided in the plan along with title, position, and telephone number.

6.3 RECORDS: Records of tests, inspections, and critical process controls shall be time stamped and maintained on file. The records must be made available to the GPO and/or IRS inspector until the expiration of the warranty period of this contract. Copies of the forms used to record the inspections and test results shall be submitted with the plan. All quality control samples must be produced at no additional cost to the Government.

6.4 INSPECTION BY THE GOVERNMENT: The right of the Government to make general or specialized tests and inspections DOES NOT RELIEVE THE CONTRACTOR OF ANY RESPONSIBILITY. Performance of all elements and functions of the Quality Systems shall not relieve the contractor of responsibility for meeting all requirements in this contract.

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

Product Quality Levels:

- (a) Printing Attributes -- Level III.
- (b) Finishing Attributes -- Level III.

Inspection Levels (from ANSI/ASQC 21.4):

- (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:

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

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

- P-7. Government furnished electronic files
- P-9. Pantone Matching System.

5.6 COMPLIANCE: To monitor compliance with IRS tax work production specifications, one or more quality assurance inspections of the tax packages may be conducted by Government Printing Office and/or Internal Revenue Service personnel.

SECTION 7 – PRODUCTION SAMPLES

The copies included in A and B are to be considered sample copies and will not be included in the quantity ordered and may not be included in the quantity billed. Shipping of these samples are to be at the contractor’s expense, and must be sent by a traceable means.

A. QUALITY ASSURANCE RANDOM COPIES - The contractor MUST submit 1,000 quality assurance copies (200 each of Items (A) thru (D) from the entire run at the completion of production, to test for compliance against specifications. The contractor must divide their entire order into equal sublots and select 1 copy from a different general area of each subplot. The contractor will be required to execute the "Certificate of Selection of Random Copies", furnished by GPO, certifying that copies were selected as directed.

These randomly selected copies must be packed separately and identified by a special Government-furnished Blue label, affixed to each affected container. Additional labels, if needed, are to be reproduced on Blue stock. The container and its contents shall be recorded separately on all shipping documents and sent to **U.S. Government Printing Office, Printing Procurement, Stop: PPSQ, Room A-843, Quality Assurance Section, Washington, DC 20401.**

Submit a copy of the SPECIFICATIONS and the signed Government-furnished "Certificate of Selection of Random Copies", along with the Quality Assurance Random Copies.

B. IRS SAMPLES: Send via traceable means 5 copies each of Items (A) thru (D) within 3 workdays after press startup to: IRS, Room C5-370, Attention: Gayle Kruemmel – SE:W:CAR:MP:P:W:T, 5000 Ellin Road, Lanham, MD 20706.

SECTION 8 – OFFERS (BIDS)

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

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

Transportation charges and mail costs are **NOT** a factor in determining award.

Bidder must state in the bid, the location (city and state) of the plant(s) from which this product will be shipped. Award will be made to the low responsible offeror whose offer is determined to be fair and reasonable.

8.1 Printing, trimming, and packing Item (A) 13,257,000 copies; Item (B) 12,801,000 copies; Item (C) 12,801,000 copies; Item (D) 9,351,000 copies; Item (E) Printing, trimming and inserting 16,070 copies; and labeling, packing, storing, staging, & turnover 16,070 cartons of forms

.....\$ _____

The bidder must state the cost for imaging address labels included in the total bid price above (Per 1,000)..... \$ _____

8.2 Prices for additional quantities

"ADDITIONAL RATE"

Printing and trimming Item (A), (2 page 2 color) per 1, 000. \$ _____

Printing and trimming Item (B), (2 page 2 color) per 1, 000. \$ _____

Printing and trimming Item (C), (2 page 2 color) per 1, 000. \$ _____

Printing and trimming Item (D), (2 page 1 color) per 1, 000. \$ _____

Labeling, packing, storing, and turnover of FULL carton quantities to fulfill any additional packing plans that exceed what is listed in Section 4.1 or for excess quantities as described in Section 1.6. (Do not include printing costs).

A. Forms (packed 3,000 per carton).....per carton...\$ _____

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

8.4 Location of shipping point/staging area:

City _____ State _____ Zip Code _____ .

8.5 Name of Contact person: _____ Phone Number: _____ FAX Number: _____

Email address (required) _____ .

FTP address (required) _____

8.6 At the same time invoices are submitted to GPO for payment, contractor must email a copy to mary.g.kruemmel@irs.gov.

Bidder must fill out, sign this page of these specifications and return it with the bid.

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

FACSIMILE BIDS are permitted. Submit facsimile bids to FAX No. 202-512-1782, one bid per facsimile. Refer to Solicitation Provisions in GPO Contract Terms (GPO Pub. 310.2), Page 1, Paragraph 6.

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

Name of Firm

Signature of Bidder