





October 31, 2019

This is Amendment No. 1. The specifications in our invitation for bids on Jacket 410-004, scheduled for opening at 11:00am, on November 5, 2019 are amended as follows:

On page 2 of 14 under "Section 1 – Schedule "of the contract specification, the Government Furnished Material date from is changed from December 17, 2019 to December **18, 2019**.

All other specifications remain the same.

If amendment is not acknowledged on bid, direct acknowledgement to:

U.S. Government Publishing Office  
Bid Section, Room C848, Stop CSPA  
732 North Capitol Street NW  
Washington, DC 20401-0001

Amended bid or acknowledgement must be submitted using the method(s) specified in the solicitation for bid submission. Telephone or e-mail submission is not acceptable.

BIDDER MUST ACKNOWLEDGE RECEIPT OF THIS AMENDMENT PRIOR TO BID OPENING.

Failure to acknowledge receipt of amendment, by amendment number, prior to bid-opening time, may be reason for bid being declared nonresponsive.

Sincerely,

YVETTE VENABLE-BROOKS  
Contracting Officer

BID OPENING: NOVEMBER 5, 2019.

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

ANY QUESTIONS BEFORE AWARD CONCERNING THESE SPECIFICATIONS CALL DALTON EVERETT, AFTER AWARD, REFER ALL QUESTIONS TO YOUR CONTRACT ADMINISTRATOR WHOSE NAME APPEARS IN THE UPPER PORTION OF THE PURCHASE ORDER. (202) 512 0307. NO COLLECT CALLS.

FACSIMILE BID SPECIFICATIONS  
U.S. Government Publishing Office (GPO)  
Washington, D.C.

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 (revised 9-19)).

NOTE: The GPO 910 "BID" Form is no longer required. Bidders are to fill out, sign/initial, all applicable pages.

**SPECIFICATIONS FOR CONTRACT PRINTING OF INSTRUCTIONS FOR FORMS 1040 AND 1040-SR FULL CARTONS SHIPPING/MAILING DIRECTLY TO TAC/POD AND TFOP DESTINATIONS FOR TAX YEAR 2019**

**Table of Contents**

**Section 1 SCHEDULE**

- 1.1 Postaward Conference
- 1.2 Daily Production Report
- 1.3 Electronic Distribution Shipping Report (Form 2040)

**Section 2 MATERIALS**

- 2.1 Furnished by the Government
- 2.2 Furnished by the Contractor
- 2.3 JCP Standards
- 2.4 Postage Statements/IRS Postal Forms

**Section 3 PAMPHLET SPECIFICATIONS**

- 3.1 Item
- 3.2 Estimated Quantity
- 3.3 Trim Size
- 3.4 Estimated Number of Pages
- 3.5 Printing
- 3.6 Binding
- 3.7 Margins
- 3.8 GPO Imprint Line
- 3.9 Electronic Proofs

**Section 4 – PACKING/CARTONS/LABELING**

- 4.1 Packing
- 4.2 Cartons
- 4.3 Labeling and Marking
- 4.4 Copies Damaged in Transit
- 4.5 Pallets

**Section 5 - DISTRIBUTION**

- 5.1 Domestic Mail (DM)
- 5.2 Small Package Carrier (SPC)
- 5.3 Motor Freight (MF)
- 5.4 Air Freight (if required)
- 5.5 Blue Label Copies

**Section 6 - QUALITY ASSURANCE**

- 6.1 Quality Assurance Levels and Standards

**Section 7 – PRODUCTION SAMPLES**

**Section 8 – OFFERS (BIDS)**

**EXHIBITS**

- Exhibit 1 – Production and Mailing Report
- Exhibit 2 – Electronic Distribution/Shipping List
- Exhibit 3 – ELITE Core Record Layout
- Exhibit 4 – IRS Publishing Postage Report
- Exhibit 5 – Postage Statement—Package Services
- Exhibit 6 – IRS Carton Label
- Exhibit 7 – IRS Pallet Specs
- Exhibit 8 – Drop Shipment Plan
- Exhibit 9 – Drop Shipment Schedule
- Exhibit 10 – UPS Email Section

**CAUTION: The instructions printed under this contract must not be mixed with instructions printed under any other contract.**

**SCOPE:** These specifications cover the printing and binding of approx. 2,533,674 (includes 200 Blue Labels) self-covered pamphlets containing approx. 112 pages. These pamphlets will mail/ship to approx. 5,121 destinations that will require packing into approx. 29,459 cartons, and include creating mailing and shipping labels, addressing, labeling and packing cartons, palletizing, staging, and mailing/shipping via Parcel Select, Small Package Carrier, Motor Freight, and Air Freight (if req'd).

**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 IRS QUANTITY, may submit increases or decreases of up to 30% of the total estimated quantity until the date specified in the schedule listed below under "Government Furnished Materials". These quantity adjustments may be made via email 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". If no changes have been received by the scheduled date for final quantity adjustments, the bid quantities will stand as the FINAL contract quantity.

**CHANGES IN PAGE COUNTS:** Pages counts may vary when the print files are received. The contractor must submit a price per thousand that the Government can increase/decrease the purchase order price by based on the final page counts and final quantities. See Offers Sections 8.2.1, 8.2.2, and 8.2.3.

**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.

### **Section 1 - SCHEDULE**

<u>Date</u>	<u>Event</u>
11-05-2019	Bid Opening
11-12-2019	Purchase Order and camera copy for Blue label.
<b>NOTE:</b> Immediately upon award contractor must notify Terri Skyrn at <a href="mailto:Theresa.L.Skyrm@irs.gov">Theresa.L.Skyrm@irs.gov</a> to provide two (2) or less email addresses for the IRS electronic files to be furnished.	
<b>Negotiated</b>	If required, Postaward Conference must be held by contractor via telephone conference.
12-17-2019	Pdf print repro for Instruction 1040 and final distribution list (IRS Form 2040) to contractor via email.
01-03-2020	Drop Shipment Plan due from contractor (if req'd).
01-17-2020	Start to ship date. Contractor must ship <b>all TAC/POD</b> destinations. See "DISTRIBUTION". If authorized by the Government, contractor may start to ship earlier.
01-22-2020	Ship complete date. All remaining destinations (TFOP) plus 200 blue labels must ship/mail. See "DISTRIBUTION". If authorized by the Government, contractor may ship complete earlier.
01-27-2020	Drop Shipment Schedule due from contractor (if req'd)

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 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.

**1.1 POSTAWARD CONFERENCE:** Unless waived by the Contracting Officer, the total requirements of the job as indicated in these specifications will be reviewed by Government representatives with the contractor's representatives via teleconference, as indicated in the schedule previously cited. 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 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

Attending the conference will be representative(s) from the Internal Revenue Service and possibly representative(s) from the Government Publishing Office. To establish coordination of all required operations, a representative from all subcontractors involved must be present as well as representatives from each involved production area for the primary contractor.

**1.2 DAILY PRODUCTION REPORT:** Contractor must provide daily production information on Form 9659 "Production and Mailing Report" (see Exhibit 1) and email Form 9659 each workday, by 1:00pm (Eastern Standard Time), to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov).

**1.3 ELECTRONIC DISTRIBUTION/SHIPPING REPORT (Form 2040):** Distribution/Shipping List is used for larger shipment address information, shipping verification, updating IRS' databases, and to inform the destination(s) of the shipping and quantity status. See Exhibit 2.

The contractor MUST update the Electronic Form 2040 and transmit via email to IRS, every day the product ships, on a computer using a "full version" of Adobe Acrobat 9.0 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 there is any information missing or incorrect, please contact Terri Skyrn at [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov).

## **SECTION 2 – MATERIALS**

### **2.1 FURNISHED BY THE GOVERNMENT:**

Print pdf with fonts embedded generated from Adobe Acrobat 9.0 or later via email. DO NOT UNEMBED FONTS. This may result in loss of data. The pdf is backward compatible to Adobe Acrobat 8.0. Contractor is cautioned that furnished fonts are the property of the Government and/or its originator. Using fonts on any job other than the one for which the fonts were submitted violates copyright law. All furnished fonts are to be eliminated from the contractor's archive immediately after completion of the contract.

Two (2) distribution files (1-TAC/POD; 1-TFOP addresses) created in a comma delimited (.csv) format via email. 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 fillable pdf Forms 9659 (Production and Mailing Report), Form 13456 (Publishing Postage Report), and Form 6153 (IRS carton label), will be emailed to the contractor shortly after award. See Exhibits 1, 4, and 6.

IRS fillable Form 2040 (Electronic Distribution/Shipping Report) will be emailed to the contractor by the date cited in the "Schedule". See Exhibit 2.

**USPS Form 3615 (Mailing Permit Application and Customer Profile) will be furnished if this form is not currently on file with the Post Office the contractor will use.**

IRS G-48 "Postage & Fees Paid" mailing indicia via email.

Small Package Carrier (SPC) IRS Account Number will be furnished to the contractor if the contractor does not have an IRS Account Number established and currently active. Contractor must only use this account number for the shipping of IRS copies.

If required, Internal Revenue Bills of Lading (IRBLs) will be furnished to the contractor via email.

IRS Pallet Specifications (see **Exhibit 7**).

**2.2 FURNISHED BY CONTRACTOR:** All materials and operations, other than those listed under "GOVERNMENT TO FURNISH", necessary to produce the product 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**). **Contractor must sort mail to effectively maximize all USPS eligible discounts.**

**Electronic Prepress:** Prior to image processing, the contractor shall perform a basic check (preflight) of the furnished publishing files to assure correct output of the reproduction image. Any errors or data corruption that might interfere with proper file image processing must be reported immediately to Terri Skyrms at [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov). This 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.

Contractor must supply all 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.

The contractor is responsible for adjusting copy for trim size and binding style.

All electronic files generated must be produced on a high-resolution output device producing quality equal to or better than an image resolution of 1200 dpi. Adjustments to the margins and/or images may be required by the contractor to meet required specifications. All halftones are to be 110-line screen or finer.

Contractor is required to have Internet access provided through their Internet Service Provider (ISP) with email and a web browser equivalent to Internet Explorer 6.0. The contractor is also required to have Adobe Acrobat 9.0 Professional (or more recent) software (*not Adobe Reader*) and the capability to receive and open file attachments compressed into a Zip (.zip) file format. The contractor must furnish no more than two (2) addresses for the IRS to email all electronic files to avoid any lapse in service. Any use of public address or web-based mail servers (i.e. Hotmail, Yahoo, Juno etc.) **IS Forbidden**.

**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 March 2011. Government Paper Specification Standards No. 12 – [http://www.gpo.gov/pdfs/customers/sfas/vol12/vol\\_12.pdf](http://www.gpo.gov/pdfs/customers/sfas/vol12/vol_12.pdf).

White or Natural (MUST be light shade) Newsprint, basis weight: 28 - 30lbs. per 500 sheets, "24 x 36", must equal JCP Code A15. **All paper used in each copy must be of uniform shade.** In addition, the weight of the newsprint paper must remain constant throughout the entire run.

**2.4 POSTAGE STATEMENT/IRS POSTAL FORMS:** The contractor must complete and submit via email a portable document file (PDF) to the IRS within three (3) workdays after the final turnover of mail packages to the USPS. The PDF should be sent in a single email when possible and the total file size of the e-mail must be less than 10 MB. If the email size exceeds 10 MB, then multiple emails must be used. Form 13456 is provided as a fillable PDF file. The IRS will complete the fields, in the "IRS Use Only" section of the form prior to e-mailing the form to the contractor. If there is any information missing or incorrect, please contact Terri Skyrms at [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov).

The PDF submitted to the IRS must contain Form 13456 and all related postal paperwork that has been combined into a single PDF. Scanning Form 13456 is NOT ALLOWED. Please fill out the provided PDF file for Form 13456, add the postal paperwork (which can be scanned) to the PDF file, save it and submit it to IRS.

The contractor must complete Form 13456 per the supplied instructions on the form and enter accurate information in the following fields: Name of contractor, Contact person at contractor, Telephone number of contact person, e-mail of contact person, Number of pages in the combined email, Date the email was sent, and the Wave/Phase Number (if applicable). The Wave/Phase number is used to show the number of mailings in the event of staggered shipments for one requisition. In addition, the contractor is responsible for capturing six (6) data elements from every postage statement (i.e. USPS Form 3602, 3602-R, 3600) and entering this information in the appropriate places on Form 13456. The six (6) elements are: (1) Zip Code of Post Office used for mailing, (2) Date on Postage Statement, (3) Pieces Mailed, (4) Copies Mailed, (5) Postage Amount, and (6) Postage Statement Type. **See Exhibit 4.**

Prior to emailing the combined PDF file, the contractor must rename the file. The file must be named using 9 digits of the Requisition Number, Post Office Zip Code, (first) Mailing Date, (last) Mailing Statement Date and .pdf (see below). In the event both mailing statement dates are the same, the first and last dates in the file name can also be the same.

Examples: For requisition number 2010-12345, the file name will be: 2010-12345\_16625\_01-02-10\_01-15-10.pdf

If the file size is 10MB or larger, the contractor must create multiple PDF files and add a suffix to the file name starting with the letter “a” then “b”, etc. (i.e. 2017-12345\_16625\_01-02-10\_01-02-17a.pdf). The contractor is also responsible for the accuracy of the information returned to the IRS. Any delay or missing data could result in a delay of payment.

- All Postage Statements (i.e. USPS Forms 3600s, 3602s, 3605s and USPS Form 8125, PVDS) 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. **See Exhibit 5.**

The email must contain only Form 13456 and associated postage statements for the designated requisition number. Contractor must not combine postage associated with multiple print order/requisition numbers in a single email transmission. The PDF must be emailed to [postage@publish.no.irs.gov](mailto:postage@publish.no.irs.gov), and [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov).

### **SECTION 3 – PAMPHLET SPECIFICATIONS---**

**3.1 ITEM:** Instructions for Forms 1040 & 1040-SR (rev 2019)—Direct Ship

**3.2 QUANTITY (estimated):** Approximately 2,533,674 (incl 200 blue labels) IRS copies.

**3.3 TRIM SIZE:** 8-3/8 x 10-7/8”

**3.4 NUMBER OF PAGES:** The page count of 112 pages is approximate and subject to change. See SECTION 8 “OFFERS” (BIDS).

**3.5 PRINTING:** Print head-to-head, in black ink. Halftones may be scattered throughout.

**3.6 BINDING:** Saddle-wire stitch in two (2) places and trim three (3) sides. Each product must contain complete four-page signatures after trimming. 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. At contractor’s option, contractor may paste on fold in lieu of saddle-stitching. All binding will be on 10-7/8” dimension, as applicable.

**3.7 MARGINS:** 3/8” head, unless otherwise furnished in electronic file; center left and right.

**3.8 GPO IMPRINT LINE:** Contractor must set and insert a GPO imprint line on each form, per GPO Pub. 310.2 (page 16). Identification markings such as register marks, commercial identification marks of any kind, etc., except GPO imprint, form number, and revision date, carried in the electronic files, must not print on finished product.

**3.9 ELECTRONIC PROOFS:** Contractor must email a soft proof using the same Raster Image Processor (RIP) that will be used to produce the final product. Proof must be emailed to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov) as soon as the contractor deems necessary to comply with the shipping schedule in the contract. Email must include the Jacket and Requisition Number. Proof will be evaluated for image position, margins, pagination, and final trim size. All elements of the product must remain legible. Proof will be withheld not more than two (2) workdays from receipt in the IRS to receipt via email in the contractor’s plant. Contractor must not print prior to receiving an “Ok-to-Proceed”.

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

#### **SECTION 4 – PACKING/CARTONS/LABELING/ADDRESSING/PALLETIZING FOR IRS COPIES:**

**4.1 PACKING:** Pack approximately 2,533,674 (incl blue labels) copies into approximately 29,459 shipping containers. Each carton must contain 86 copies and packed in two (2) even stacks of 43 copies each with full size corrugated boards on top and bottom of stacks. Containers must be packed solid to avoid copies being damaged during transit. Container weight must not exceed 32lbs when fully packed.

**4.2 CARTONS:** Cartons must be corrugated or solid fiber shipping containers, 1380 kPa (200 psi) minimum bursting strength and minimum edge crush strength of 35 psi. Bottom flaps must be glued or sealed with polyester tape 2 to 3" width, minimum 12 kNm (65 lbs./inch) transverse tensile strength). Top flaps of cartons must be securely sealed at top with 2 to 3" paper or polyester tape (not reinforced). Cartons must be packed solid. Cartons must not have excessive air space (dunnage) when fully packed to prevent crushing or deformation. Cartons must not open nor split during transit through the motor freight/airfreight 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.

**If carton weight exceeds 32lbs when fully packed**, contractor must email Terri Skyrms at [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov) for resolution prior to packing. Carton filler (if necessary) must be composed of material that can be easily removed without damaging contents. Packing peanuts or beads are strictly prohibited. Contractor must determine exact dimensions of carton in accordance with the trim size and weight of product produced. **The exterior dimensions of all cartons must not exceed 17-1/2" (L) x 11-1/2" (W) x 9" (D).**

**4.3 LABELING/MARKING:** EACH carton must contain an IRS carton label Form 6153 (see Exhibit 6) generated from the provided pdf. Handwritten labels and contractor stream-lined or recreated labels are strictly prohibited. Contractor is required to produce the appropriate number of IRS carton labels needed for this contract on white paper or white adhesive label stock, in black ink, and reproduced the same size as the pdf provided. 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 NEVER be affixed such that it extends over the edge and onto an adjacent side.

For all IRS carton labels (Form 6153), the contractor is required to update/enter the Carton # of # for each address; the "To (Consignee---complete address)"; and the "From---contractor's address," fields electronically in black ink, and minimum 12pt type. 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 Terri Skyrms @ [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov) to resolve the discrepancy prior to packing.

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 stretch 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 container 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 carton label MUST NEVER be affixed such that it extends over the edge 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. 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.).

From the furnished distribution (.csv) files, the contractor must image/print approximately 10 lines, in black ink, on each SPC label. Imaging/Printing on each SPC label consist 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 and state on fourth line; Bloomington, IL return address in top left-hand corner of all SPC and USPS labels; and two (2) reference lines at bottom of SPC label.



Contractor must image/print in black ink the following return address on all contractor created UPS and USPS labels:

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

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

UPS shipping systems provides two (2) reference fields that are required to be imaged or printed in black ink on each label created by the contractor. Reference fields 1 and 2 below must be imaged or printed in black ink, minimum 12pt type.

1. Reference Field 1: IRS requisition number and GPO jacket number (i.e. 20-00609/410-004)
2. Reference Field 2: TAC or TFOP (as applicable)

**USPS Parcel Select Labeling:** In addition to the IRS container label (Form 6153), a contractor created Parcel Select mailing label must be securely affixed to the TOP of the carton. The USPS mail label MUST NEVER be affixed such that it extends over the edge and onto an adjacent side

In addition to the "Postage and Fees" mailing indicia, the contractor must image/print approximately twelve (12) 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 and state 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; Penalty for Private Use \$300 under return address; and two (2) reference fields at bottom of USPS label.

The two (2) reference fields required at the bottom of each USPS label are:

1. Reference Field 1: IRS requisition number and GPO jacket number (i.e. 20-00609/410-004)
2. Reference Field 2: TAC or TFOP (as applicable)

**Caution:** In the event that cartons are mislabeled, incorrect carton labels and/or incorrect pallets are utilized, cartons are crushing, collapsing, or bursting due to the cartons not being packed per contract, labels are not securely affixed to the cartons/pallets or labels are affixed to the incorrect area of the cartons/pallets, cartons are not layered correctly on the pallets, pallets are not wrapped properly and securely, the shipment will either be returned to the contractor to be corrected/replaced or the contractor will be required to make the corrections/replacements on site, with all costs borne by the contractor. Contractor must make all corrections and/or replace all damaged materials within 24 hours of notification via email. If the corrections and or replacements are not completed by the contractor within 24 hours of notification, the Government will hire an outside vendor to make all corrections and/or replacements (except printed product contained within cartons) and the contractor will borne all costs incurred by the Government.

**4.4 COPIES DAMAGED IN TRANSIT:** CONTRACTOR MUST REPLACE AND SHIP ALL COPIES DAMAGED IN TRANSIT WITHIN 24 HOURS OF DEFICIENCY NOTIFICATION, VIA OVERNIGHT DELIVERY. CONTRACTOR WILL BE NOTIFIED OF THE DEFICIENCY VIA EMAIL. CONTRACTOR WILL INCUR ALL CHARGES TO REPLACE AND SHIP DAMAGED COPIES.

**4.5 PALLETS:** All shipments to a single destination weighing more than 750lbs., require pallets. Pallets must be type III and must conform to Federal Specifications NN-P-71C, and any amendments applicable except for dimensions and single center stringer. Pallets must be 48" in length, 40" in width, and must not exceed 5" in height. Full entry MUST be on the 40" width. **See Exhibit 7.** Strict adherence to these dimensions is necessary to accommodate storage requirements as well as ease of packing into freight carrier trailers. Cartons shall be stacked on pallets using a reverse layer pattern, 9 cartons per layer, with a maximum height of 55", including pallet. **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. The use of metal strapping or pallet caps for securing material on pallets is **strictly prohibited**. **NOTE:** More than one partial pallet per destination is **strictly prohibited**.

**Bill of materials list:** 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.

**DOUBLE-STACKING PALLETS WHEN LOADING INTO TRUCK/TRAILER FOR SHIPPING IS *STRICTLY PROHIBITED*.**

**SECTION 5 – DISTRIBUTION (MAILING/SMALL PACKAGE CARRIER/MOTOR FREIGHT/AIR FREIGHT):**

Approx. 2,533,474 (excludes 200 “Blue Label copies”) copies ship/mail f.o.b. contractor city to approx. 5,121 destinations.

Unless otherwise specified in writing from the IRS, the contractor must ship/mail f.o.b. contractor city in the following sequence:

(1st) **TAC/POD** (i.e. accounts appearing in file as “p123456789”) destinations must ship/mail complete by January 17, 2020. In addition, destinations furthest from contractor’s shipping location must ship first; destinations closest to contractor’s shipping location must ship last. Approximately 208,378 copies will ship/mail f.o.b. contractor’s city to approximately 321 destinations.

(2nd) **TFOP** (i.e. accounts appearing in file as “TF123456A”) destinations must ship/mail complete by January 22, 2020. In addition, destinations furthest from contractor’s shipping location must ship first; destinations closest to contractor’s shipping location must ship last. Approximately 2,325,096 copies will ship/mail f.o.b. contractor’s city to approximately 4,800 destinations.

Contractor must ship 200 “Blue Label” (included) copies f.o.b. contractor city via IRS furnished SPC account number.

**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 Terri Skyrn at [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov) for resolution prior to labeling and shipping.

*If contractor ships or mails incorrectly, contractor will borne all additional costs incurred by the Government.*

All expenses incidental to picking up GPO government furnished materials and furnishing 5 production samples to Lanham, Maryland, must be borne by the contractor.

**5.1 DOMESTIC MAIL (DM):** Mailings must be made at Parcel Select DNDC/DSCF Presort and Parcel Select postage rates as applicable.

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.

The contractor must comply with all U.S. Postal Service regulations/requirements governing the preparation of Drop Ship Parcel Select DNDC/DSCF and/or Parcel Select rate mailings which are in effect at the time of the mailing, including the issuance of the required USPS forms (mailing statements), the weighing of shipments (mail manifests), etc. Mailings which do not qualify for Drop Shipments must be mailed Parcel Select.

**Mailings that do not qualify for Parcel Select postage rates must be mailed reimbursable Standard Post.** Contractor must create the Standard Post mailing label and the label must contain the same information and format required for the Parcel Select label (excluding the Parcel Select mailing indicia). Contractor must apply the appropriate postage to each mailing. Contractor will be reimbursed for Standard Post postage by submitting a properly completed Postal Service (or equivalent) form with the voucher for billing.

The contractor is cautioned that “Postage and Fees Paid” Parcel Select indicia may only be used for mailing material produced under this contract.

The contractor **MUST** meet with local postal authorities before the start of production to make arrangements for verification and DNDC/DSCF Parcel Select manifest approvals. The Domestic Mail Manual and other related USPS publications for Parcel Select mailings must be adhered to by all mailers.

The U.S. Postal Service will require that each DNDC/DSCF 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 DNDC/DSCF rate mailings at least 5 workdays in advance by contacting the manager, logistics and distribution, or designee, at the designated DNDC/DSCF,

etc. The contractor/mailer must comply with the scheduled time.

**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 full cartons containing copies to determine the accurate weight for each carton size. This procedure is both necessary and critical for providing an accurate manifest to the Postal Service for verification purposes.

**USPS Plant-Verified Drop Shipments:** On or before the date in the schedule, the contractor MUST submit its detailed plant-verified drop shipment plan for direct shipments to the DNDC/DSCFs, etc. The contractor must include all costs for preparing and implementing this plan in the total bid price (a separate charge will not be allowed). The detailed plan must be in the format shown in **Exhibit 8** for each shipment. The detailed plan must include the GPO jacket number and must be emailed to: [Roy.M.Murdoch@irs.gov](mailto:Roy.M.Murdoch@irs.gov), [Tami.L.Pike@irs.gov](mailto:Tami.L.Pike@irs.gov), and [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov). The Government will approve or disapprove the drop shipment plan within three (3) workdays after receipt. NOTE: At Government's option, Internal Revenue bills of lading (IRBLs) may be furnished.

Reimbursement for the actual freight costs for drop shipping will be made from copies of the commercial carrier freight bills that must be submitted with the contractor's invoice, and each freight bill must show the shipping cost and weight of the shipment." If the contractor utilizes a freight consolidator, payment will be made with the submission of the contractor's invoices showing actual charges to the contractor. Reimbursed freight costs will not be subject to any "prompt payment discounts. The contractor must provide the scheduled dates for dropping at the DNDCs/DSCFs. Contractor must include copies of the USPS Form 8125 that have been signed at the recipient destination along with their freight bills and invoices or a Track/Trace report showing the appointment dates and USPS confirmation numbers. Freight charges must not exceed those in the submitted drop shipment plan, except for allowable fuel surcharges. Current allowable fuel surcharges must be included in the drop shipment plan.

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 at least 72- hour notice for pickup of full truckload shipments.

The postal employee verifying the mail will provide a signed copy of Form 8125 (Plant-Verified Drop Shipment Verification and Clearance (PVDS) document. The CONTRACTOR/MAILER is responsible to ensure that this document travels with the mail and is made available for examination upon the request of the postal service at the destined DNDC/DSCF.

**Drop Shipment Schedule:** Within three (3) workdays of mailing complete, the contractor must email the scheduled dates and volumes for dropping at the DNDC/DSCFs to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov). Contractor must furnish a completed Drop Shipment Schedule in a similar format as shown in **Exhibit 9**.

**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 in to 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.

**5.2 SMALL PACKAGE CARRIER (SPC) Contractor's City 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.

**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.

- International packages (if required) weighing less than 500 lbs to one destination will be sent via small package carrier World Wide Express services.
- Expedited (air) 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 2nd Day air services.

The IRS will notify the contractor when expedited shipments are required. Contractor must not use Next Day or Second Day Air

options unless authorized by the IRS.

The IRS will provide an IRS small package account number. The Contractor must notify Terri Skyrn at [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@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 Terri Skyrn 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's must notify UPS of the amount 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 and account number (i.e. p123456789 or TF123456A)). See **Exhibit 10**.

NOTE: All returned emails should be set to automatically forward to: [wi.tdfps.upsundelive@irs.gov](mailto:wi.tdfps.upsundelive@irs.gov)

Within three (3) workdays of shipping complete, the contractor must email the SPC shipping manifest including a "TRACK IT" link for each destination to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov).

**5.3 MOTOR FREIGHT (MF) Contractor's City 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 seven (7) workdays prior to the first shipment date, the contractor must notify Roy Murdoch @ 309-556-5076 or [Roy.M.Murdoch@irs.gov](mailto:Roy.M.Murdoch@irs.gov), or Tami Pike @ 859-320-3800 or [Tami.L.Pike@irs.gov](mailto:Tami.L.Pike@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 five (5) 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 Joseph Anidiobi between the hours of 8:30 AM and 4:00PM 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 Roy Murdoch @ 309-556-5076 or [Roy.M.Murdoch@irs.gov](mailto:Roy.M.Murdoch@irs.gov), or Tami Pike @ 859-320-3800 or [Tami.L.Pike@irs.gov](mailto:Tami.L.Pike@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. Use of IRBLs for shipments not authorized

by the IRS is strictly prohibited.

Within two (2) workdays of shipping complete, the contractor must email IRBLs containing truckers' signatures and dates copies were picked up from contractor's plant to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov)

In addition, contractor must notify IRS of all unused IRBL numbers furnished under this contract. Notification of unused IRBL numbers must be emailed to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov). Any unused bills of lading must be destroyed by the contractor.

**5.4 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. Shipments weighing less than 500lbs must be sent via UPS Air Express – Next or Second Day delivery. The contractor must contact the designated air freight carrier to coordinate all air shipments and, verify acceptance of pallets and maximum pallet weight is within that specific carrier's allowable weight limit.

Within two (2) workdays of shipping complete, the contractor must email IRBLs containing air freight carrier signatures and/or UPS manifest including a "TRACK IT" link for each destination to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov)

**5.5 DEPARTMENTAL RANDOM "BLUE LABEL" COPIES:** The contractor MUST submit 200 departmental random copies at the completion of production to test for compliance against specifications. The contractor must divide their total quantity 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 and identified by a special Government-furnished Blue label, affixed to each affected container. Shipping of blue labels for multiple items in a single container is strictly prohibited. Additional labels, if needed, are to be reproduced by contractor on Blue stock. The container and its contents shall be recorded separately on all shipping documents and sent to Internal Revenue Service, National Distribution Center, 2525 Revenue Drive, Bloomington, IL 61705-2500. Submit a copy of the SPECIFICATIONS and the signed Government-furnished "Certificate of Selection of Random Copies", along with the Departmental Random Copies.

## **SECTION 6 – QUALITY ASSURANCE**

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

Product Quality Levels:

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

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	OK'd priors/Furnished electronic files
P-8. Halftone Match (Single and Double Impression)	OK'd priors/Furnished electronic files
P-9. Solid and Screen Tint Color Match	Pantone Matching System

## **SECTION 7-----PRODUCTION SAMPLES:**

Contractor must send 5 production samples within 3 workdays after bindery startup to: IRS, Room C6-446, Attention: Terri Skyrn, (240) 613-5497, 5000 Ellin Road, Lanham, MD 20706. **NOTE:** *These copies are to be considered sample copies and WILL NOT be included in the quantity ordered and MUST NOT be included in the quantity billed.* Shipping of these samples must be borne by the contractor and sent overnight by traceable means. In addition, **contractor must NOT include these copies on IRS Forms 2040 and 9659.**

## **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" submitted 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 or NC (No Charge) for each line item in Sections 8.1, 8.2.1, 8.2.2, 8.2.3, and 8.2.4 on the following page. If an entry of NC is entered it shall be held the bidder intends to furnish those individual items at no charge to the Government.

Transportation charges are NOT a factor in determining award.

Bidder must fill out, initial/sign as indicated on pages 13 and 14 of these specifications.

**PREAWARD SURVEY:** In order to determine the responsibility of the prime contractor or any subcontractor, the Government reserves the right to conduct an on-site 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 low contractor 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 a timely manner 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 (if no samples are required) 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.

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>.

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.

**BID SUBMISSION:** Submit bid in pre-addressed envelope furnished with solicitation or send to: U.S. Government Publishing Office, Bid Section, Room C-848, Stop: CSPS, 732 North Capitol Street, NW, Washington, DC 20401. Facsimile bids in response to this solicitation are permitted. Facsimile bids may be submitted directly to the GPO Bid Section, Fax No. (202) 512-1782. The Jacket number and bid opening date must be specified with the bid. Refer to Facsimile Bids in Solicitation Provisions of GPO Contract Terms, GPO Publication 310.2, as revised January 2018. Hand delivered bids are to be taken to: GPO Bookstore, 710 North Capitol Street, NW, Washington, DC, between the hours of 8:00 a.m. and 4:00 p.m., prevailing Washington, DC, time, Monday through Friday. The contractor is to follow the submission instructions posted in the Bid Submission/Opening area. If further instruction or assistance is required, call (202) 512-0526.

8.1 Printing and Binding approx. 2,533,674 pamphlets (incl blue labels); creating mailing/shipping labels, labeling and marking, packing and sealing containers, palletizing, staging, and mailing/shipping approx. 29,459 cartons of instructions. \$ \_\_\_\_\_

Bidder must state the cost of preparing and implementing the drop shipment plans included in the total bid above. \$ \_\_\_\_\_

8.2 Prices for Page Count Changes: The page count may change from the originally stated page count at the time the print files are received. The contractor must enter a price or NC (no add'l charge to Government) below in 8.2.1 and 8.2.2. If contractor fails to enter a price or NC in 8.2.1 and 8.2.2, the contractor will be deemed non-responsive. The appropriate figures listed below in 8.2.1 and 8.2.2 must include set-up charges and will be used to increase/decrease the purchase order price based on FINAL page counts and FINAL quantities. These prices are not a factor in award. Although these prices are not a factor in award, the Government reserves the right to reject/renege any prices it deems unreasonable at time of award.

8.2.1--- If page count increases from originally stated in the specifications, the price submitted below will increase the original Purchase Order price accordingly.

4 Pg. Increase.....\$ \_\_\_\_\_/M

8.2.2--- If page count decreases from originally stated in the specifications, the price submitted below will decrease the original Purchase Order price accordingly.

4 Pg. Decrease.....\$ \_\_\_\_\_/M

8.2.3--- Prices for Quantity Changes: Regardless of final page count, the price submitted in 8.2.3 will decrease/increase the original Purchase Order price by the difference between the bid quantity and the final quantity.

"ADD'L RATE"

Printing and Binding..... per 1, 000 copies...\$ \_\_\_\_\_

8.2.4--- Labeling, addressing, packing and sealing, palletizing, etc.: Price submitted in 8.2.3 will decrease/increase the original Purchase Order price by the difference between the number of approximate cartons stated in the bid quantity and the number of cartons utilized based on the final quantity..... 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 Location of Post Office from which copies will be mailed:

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

8.6 Name of Contact person: \_\_\_\_\_ Phone Number: \_\_\_\_\_ FAX Number: \_\_\_\_\_

Email address (required) \_\_\_\_\_.

8.7 At the same time invoice and associated documentation is submitted to GPO for payment, contractor MUST email a copy to [Theresa.L.Skyrm@irs.gov](mailto:Theresa.L.Skyrm@irs.gov).

**JACKET NUMBER: 410-004**

**BID PRICE: \$** \_\_\_\_\_

**DISCOUNTS:** Discounts are offered for payment as follows: \_\_\_\_\_ Percent, \_\_\_\_\_ calendar days. See Article 12 "Discount" of solicitation Provision in GPO Contract Terms (Publication 310.2).

**AMENDMENT(S):** Bidder hereby acknowledges amendment(s) number(ed) \_\_\_\_\_

**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.

**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 fax or mail, fill out and return one copy.

Bidder \_\_\_\_\_  
(Contractor Name) (GPO Contractor's Code)

\_\_\_\_\_  
(Street Address)

\_\_\_\_\_  
(City – State – Zip Code)

By \_\_\_\_\_  
(Printed Name, and Title of Person Authorized to Sign this Bid)

\_\_\_\_\_  
(Signature) (Date)

\_\_\_\_\_  
(Telephone Number) (Email)

Contracting Officer Review: \_\_\_\_\_ Date: \_\_\_\_\_ Certifier: \_\_\_\_\_ Date: \_\_\_\_\_  
(Initials) (Initials)



# 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** \_\_\_\_\_  
**Product(s)** \_\_\_\_\_ **GPO Jacket(s)** \_\_\_\_\_  
**QM Submitting** \_\_\_\_\_ **Date Submitted** \_\_\_\_\_

Date	Printed	Bound/Finished	Imaged	Inserted	Other ( )	Mailed
<b>Cumulative Totals</b>						

**Comments**  
 (EX: SC or BMC mail totals or production notes.)

### Distribution / Shipping List

Requisition number	Jacket number	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"/> Revison	Ship date	<input type="checkbox"/> FOB contractor city <input type="checkbox"/> FOB destination	
Printing specialist	Phone number	Distribution analyst	Phone number	Carton 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
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		
		<input type="checkbox"/>		

## 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.

<b>IRS Header Title</b>	<b>Length</b>	<b>UPS WorldShip Field Name</b>
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



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## Instructions for Form 13456, IRS Publishing Postage Report

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**Publishing Specialist Instructions:** Publishing Specialists must complete the fields in the "IRS Use Only" section of the form. Once these fields are complete, use the "Lock IRS Fields" button at the top of the page to lock the fields and allow the "Email" and "Continuation Page" buttons to be visible. Then attach the Form 13456 in a separate email and send it to the contractor.

**Contractor Instructions:** Contractors must complete and submit via email a portable document format (PDF) file to the IRS within three (3) workdays after each turnover of the product to the USPS. Details to fill in the data fields, rename the PDF, and email the PDF are below. **Scanned pages of the Form 13456 will not be accepted.**

### 1) Fill in contractor and postage data fields

Form 13456 is provided as a fillable PDF file. Each field for the contractor to complete is listed below with specific instructions as needed.

- **Name of contractor**
- **Contact person at contractor's office**
- **Telephone number of contact person**
- **Email address of contact person**
- **Mailing start date:** The date the first piece is mailed
- **Mailing end date:** If not all pieces were sent on the start date, this is the date the last piece is mailed
- **Mailings: (Optional).** Check this box to note there will be multiple mailings
- **Wave: (Optional).** Check this box to note that the multiple mailings will be sent in "waves". Use the blank fields next to this check box to distinguish the number of current wave from the number of total waves.
- **Zip Code:** The ZIP code of the post office from which pieces are mailed
- **Date on Mailing Statement:** The mailing date on the postage statement
- **Pieces Mailed:** The number of envelopes, containers, or cartons, etc., that is mailed
- **Copies Mailed:** The total number of items *inside* each envelope, container, or carton, etc., that is mailed
- **Postage Amount:** The total dollar amount listed on each postage statement
- **Postage Statement Type:** Use the pull down menu to designate which type of postage statement (i.e. USPS Form 3602, 3602-R, 3605, 3600, 3607R) was used.

Form 13456 must contain only postage information for the IRS requisition number at the top of the form. Contractor **must not** combine postage associated with multiple print order/requisition numbers on a single form.

If all the lines on the front of Form 13456 are filled in, use the "Add New Mailing Rows" button to add another row of data fields.

### 2) Electronically attach postage statements to Form 13456

Use the "Add Attachment" button at the bottom of Form 13456 to attach postage statement copies. This PDF file must contain the front page of Form 13456 and all continuation sheets (if applicable); and, copies of all postage statements that are associated with the requisition number listed on Form 13456. This results in a new PDF.

### 3) Rename the new PDF as per the contract specifications

Prior to emailing the new PDF file, the contractor must rename the file. The PDF file must be named using nine (9) digits of the IRS Requisition Number, the first five (5) digits of the Post Office Zip Code, Mailing start date (MM/DD/YY), Mailing end date (MM/DD/YY) and .pdf (see below).

**Example:** For requisition number 20YY-12345, the file name will be: 20YY-12345\_16625\_01-02-YY\_01-15-YY.pdf.

In the event the "mailing start date" and the "mailing end date" are the same, the contractor must enter the same date twice in the renamed file (see below).

**Example:** For requisition number 20YY-18345, the file name will be: 20YY-18345\_16625\_01-02-YY\_01-02-YY.pdf.

### 4) Email the new PDF (Form 13456 with all attached postage statements)

Use the "Email to IRS . . ." button on the front of Form 13456 to email the PDF to:

- [postage@publish.no.irs.gov](mailto:postage@publish.no.irs.gov); and, to the
- **Publishing Specialist's email address**

The PDF file should be sent in a single email when possible. The total file size of the email must be 10 MB or less. If the file size is larger than 10 MB, the contractor must create multiple PDF files, and add a suffix to the end of each file name starting with the letter "a" then "b", etc. (i.e. 20YY-18345\_16625\_01-02-YY\_01-15-YYa.pdf).

The contractor is responsible for the accuracy of the information returned to the IRS. **Any delay or missing data could result in a delay of payment.**

# Postage Statement — Package Services

Post Office: Note Mail Arrival Date & Time  
(Do Not Round-Stamp)

(Bound Printed Matter, Library Mail, Media Mail, Parcel Post, and Parcel Select)

Use this form for all Package Services. Only Library Mail and Media Mail may be combined.

<b>Mailer</b>	Permit Holder's Name and Address and Email Address If Any	Telephone	Name and Address of Mailing Agent (If other than permit holder)	Telephone	Name and Address of Individual or Organization for Which Mailing Is Prepared (If other than permit holder)
	CAPS Cust. Ref. No. _____ Customer No. _____		Customer No. _____		Customer No. _____

<b>Mailing</b>	Post Office of Mailing	Processing Category <input type="checkbox"/> Flats <input type="checkbox"/> Parcels	Mailing Date	Federal Agency Cost Code	Statement Seq.No.	No. & Type of Containers _____ Sacks _____ Flat Trays _____ Pallets _____ Other
	Type of Postage <input type="checkbox"/> Permit Imprint <input type="checkbox"/> Metered		Weight of a Single Piece _____ pounds		Total Pieces	
	Permit #	Packaging Based on <input type="checkbox"/> Piece Count <input type="checkbox"/> Weight <input type="checkbox"/> Both	If Sacked, Based on <input type="checkbox"/> Piece Count <input type="checkbox"/> 20 Pounds		Total Weight	
	For Barcoded Rate Pieces, Enter Date of Address Matching and Coding ____/____/____					

<b>Postage</b>	Parts Completed (Select all that apply) <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D & E <input type="checkbox"/> S	
	<b>Total Postage</b> (Add parts totals)	
	Price at Which Postage Affixed (Check one) Complete if the mailing includes pieces bearing metered or precanceled stamps. <input type="checkbox"/> Correct <input type="checkbox"/> Lowest <input type="checkbox"/> Neither _____ pcs. x \$ _____ = <b>Postage Affixed</b>	
	<b>Net Postage Due</b> (Subtract postage affixed from total postage)	
	For USPS Use Only: Additional Postage Payment (State reason)	
	(Add additional payment to net postage due and total in box for affixed or permit imprint - choose one only) <b>Total Adjusted Postage Affixed</b>	
Postmaster: Report Total Postage in Applicable AIC (Permit imprint only)	<b>AIC 131</b>	<b>Total Adjusted BPM Postage Permit Imprint</b>
	<b>AIC 124</b>	<b>Total Adjusted Media Mail/Lib. Mail Postage Permit Imprint</b>
	<b>AIC 223</b>	<b>Total Adjusted Parcel Post/Select Postage Permit Imprint</b>

<b>Certification</b>	The mailer's signature certifies acceptance of liability for and agreement to pay any revenue deficiencies assessed on this mailing, subject to appeal. If an agent signs this form, the agent certifies that he or she is authorized to sign on behalf of the mailer, and that the mailer is bound by the certification and agrees to pay any deficiencies. In addition, agents may be liable for any deficiencies resulting from matters within their responsibility, knowledge, or control. The mailer hereby certifies that all information furnished on this form is accurate, truthful, and complete; that the mail and the supporting documentation comply with all postal standards and that the mailing qualifies for the rates and fees claimed; and that the mailing does not contain any matter prohibited by law or postal regulation. I understand that anyone who furnishes false or misleading information on this form or who omits information requested on this form may be subject to criminal and/or civil penalties, including fines and imprisonment.		
	<i>Privacy Notice:</i> For information regarding our Privacy Policy visit <a href="http://www.usps.com">www.usps.com</a>		
	Signature of Mailer or Agent	Name of Mailer or Agent	Telephone

<b>USPS Use Only</b>	Weight of a Single Piece _____ pounds	Is figure at left adjusted from mailer's entries? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," Reason			
	Total Pieces	Total Weight			
	Total Postage				
	Presort Verification Performed? (Check One) <input type="checkbox"/> Yes <input type="checkbox"/> No				
	I CERTIFY that this mailing has been inspected concerning: (1) eligibility for postage rates claimed; (2) proper preparation (and presort where required); (3) proper completion of postage statement; (4) payment of annual fee; and (5) sufficient funds on deposit (if required)	Date Mailing Notified	Contact	By (Initials)	
	USPS Employee's Signature	Print USPS Employee's Name		Time	AM PM

Round Stamp (Required)  
Date Mail Released

**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

**Carton Shipping Label**

Department of the Treasury <b>Internal Revenue Service</b>		Publishing analyst	Phone number	Carton #	of #
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-nnnnn)				

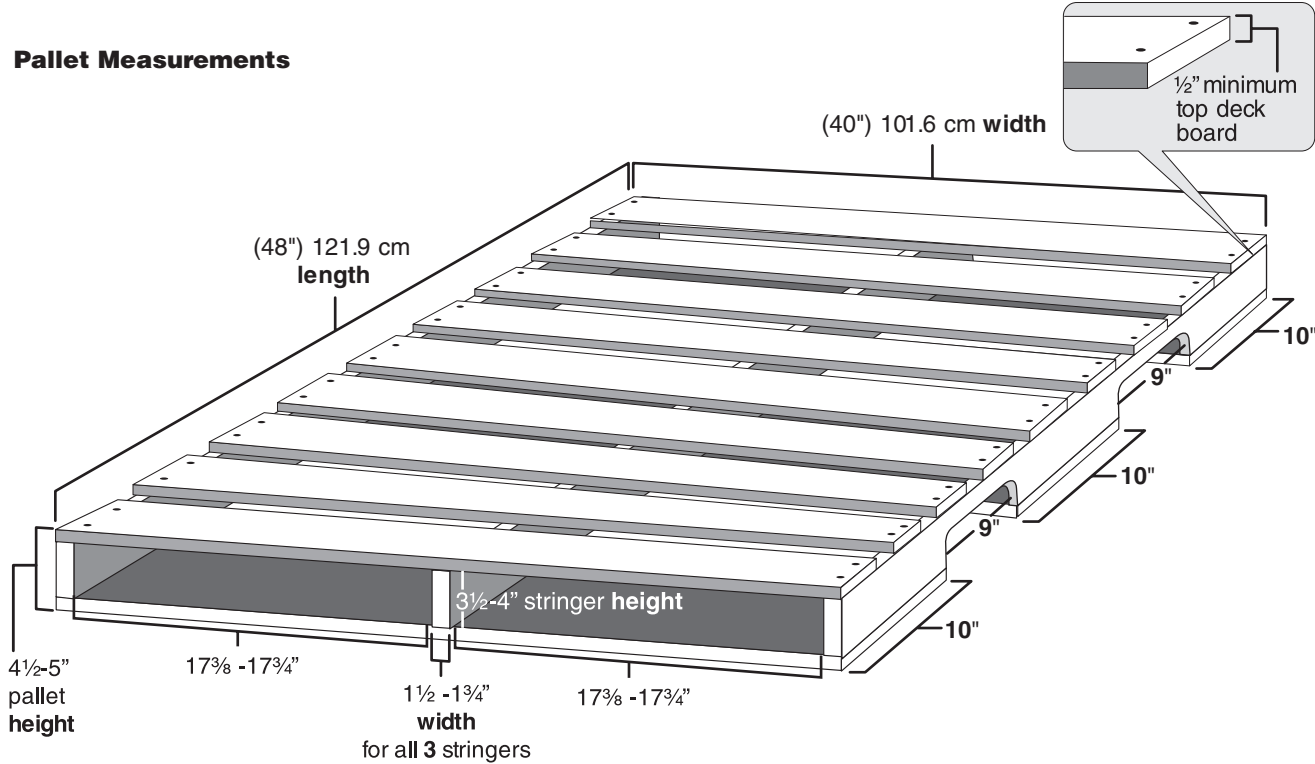


# IRS Pallet Specifications

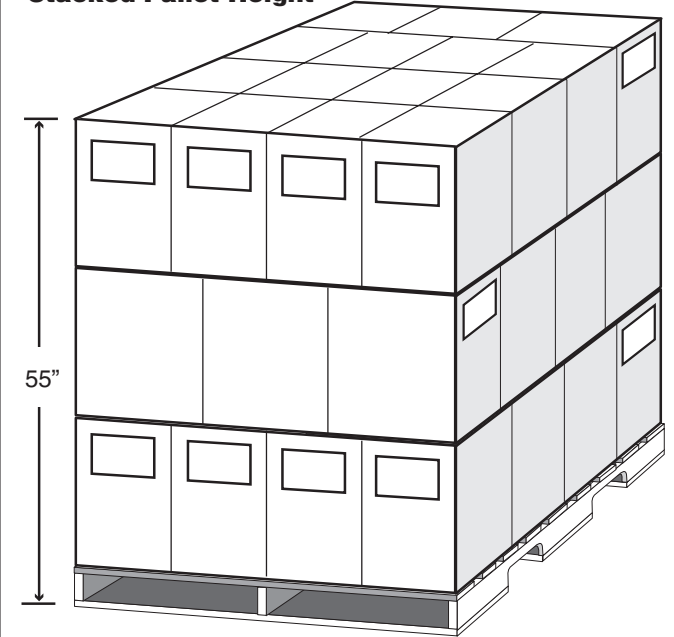
## Exhibit 7

All shipments delivered to the National Distribution Center (NDC), must conform to the specifications outlined in this document. To ensure shipments are 100% compliant and received by the NDC, please reference Publication 4803 and any relating information outlined in the work contract specifications. Non-conformance to the specifications of this document, the standards described in Publication 4803 and or specific instructions outlined in the work contract specifications, may result in corrections at the vendor's expense.

### Pallet Measurements

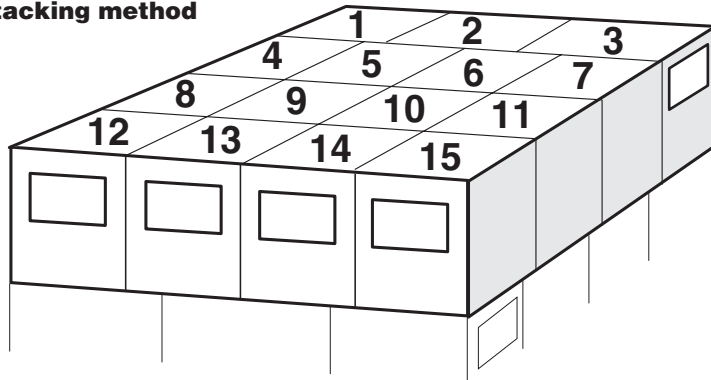


### Stacked Pallet Height



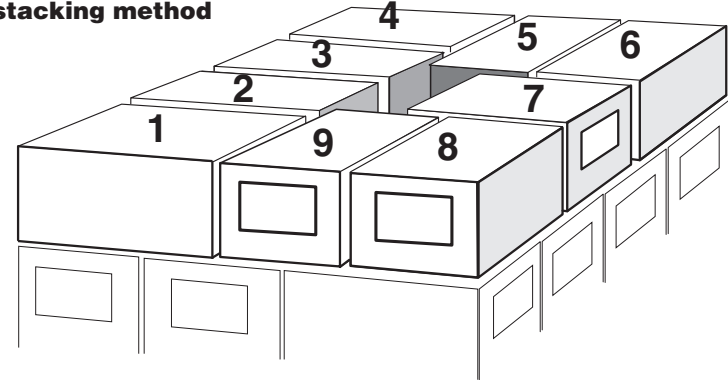
For IRS products the maximum full pallet height (pallet + cartons) **must not** exceed 55".

### 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 9

Drop Shipment Schedule


DNDC/DSCF

Scheduled Drop Date

Volume

Recipient Delivery Date

Sample of UPS Quantum View Notify Email generated from File:



This message was sent to you at the request of IRS to notify you that the electronic shipment information below has been transmitted to UPS. The physical package(s) may or may not have actually been tendered to UPS for shipment. To verify the actual transit status of your shipment, click on the tracking link below or contact IRS directly.

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**Important Delivery Information**

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**Message from IRS:**  
The IRS is shipping your order of F 1040, F 1040 A, F 1040 EZ, F 1040 SCH A & B within the next 5 days.

**Scheduled Delivery:** 20-May-2011

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**Shipment Detail**

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**Ship To:**  
JOANNE GENTRY  
AGAWAM PUBLIC LIBRARY  
750 COOPER ST  
AGAWAM  
MA  
010012177  
US

**Number of Packages:** 3  
**UPS Service:** GROUND  
**Weight:** 80.0 LBS

**Tracking Number:** [1Z7621240392525675](http://www.ups.com/WebTracking/track?loc=en_US)  
**Reference Number 1:** 10-15324/309-654  
**Reference Number 2:** TF100045J

[Click here](http://www.ups.com/WebTracking/track?loc=en_US) to track if UPS has received your shipment or visit [http://www.ups.com/WebTracking/track?loc=en\\_US](http://www.ups.com/WebTracking/track?loc=en_US) on the Internet.