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TAX COLLECTOR
Sarasota County, Florida

Invitation to Bid (ITB)
Mailing Services

ITB Release Date: Thursday, June 25, 2026
Proposal Due Date: Thursday, July 9, 2026, by 5:00 PM (ET)
Submission Email: Purchasing@SarasotaTaxCollector.gov

1. Introduction

The Sarasota County Tax Collector's Office invites qualified firms or individuals to submit proposals to provide bulk mailing services. These mailing services shall include creating, processing, and distributing the Sarasota County Notice of Ad Valorem Taxes and Non-Ad Valorem Assessments, Reminder Notices, and Attorney Tax Renewal Notices.

2. Scope of Services

The selected vendor will be expected to meet or exceed the following goals and deliverables:

- **Vendor must be able to create, process, and distribute a variety of notices for the Tax Collector. These notices must be mailed on a timely basis in order to meet deadlines. <u>These include, but are not limited to</u>:**
    - Sarasota County Notice of Ad Valorem Taxes and Non-Ad Valorem Assessments
    - Reminder Notices
    - Quarterly Installment Property Tax Notices
    - Attorney Tax Notices
- **Vendor must identify the service cost for each identified activity.**
    - In the event Vendor prints more than requested, Tax Collector shall not be responsible for the payment, storage, or destruction of such additional copies.

- **Vendor must have the ability to provide forms and formats as requested by the Tax Collector.**
- **Ability to meet current and future service requirements.**
    - Specifics for each project may change in the future based on legislative, technological, or procedural changes.
- **Demonstrated ability of successfully completing jobs of similar scale and magnitude in the past.**
- **Vendor must be able to comply with all federal, state, and local regulations.**
- **Vendor must have the ability and willingness to conform and adapt to unavoidable delays in the mailing schedule.**
- **Payment, excluding postage cost, will be paid by the Tax Collector at the completion of each project provided the vendor has issued a written invoice with statistical verification of the charges.**
    - Prior to mailing, vendor may submit an invoice for estimated postage. Tax Collector will ACH all payments to vendor.
    - Vendor will use the least cost postage for all mailings.
- **Qualified proposing vendors must meet the following minimum criteria in order to have their proposal considered:**
    - **Must be C.A.S.S. (Coding Accuracy Support System) certified by the U.S. Postal Service and provide a copy of their certificate;**
    - **Must have the capability to obtain NCOA (National Change of Address) certification for mailing.**
- **The size and format of the notices are fixed and cannot be altered, unless approved by the Tax Collector.**
    - Samples of our current forms and notices are supplied and attached to this ITB as a separate download on the website.
    - Vendors are to use the color combinations in estimating costs (unless otherwise noted).
    - If the vendor would like to provide an alternative form and/or layout for approval, they may do so, in addition to the response based on forms as provided.

    - If a vendor cannot provide the forms as in the samples, it should be noted as an exception, and the alternative then provided. The Tax Collector may review the alternative provided but may disqualify the response if, in his opinion, the alternative is not in the best interest of the Tax Collector's office.

- **Planning Schedule**
    - Each vendor is to prepare a summary planning schedule for each project, indicating time frames for testing, materials, production and mailing. Please attach schedules to Response Form A.
- **Envelopes**
    - The vendor may supply additional envelopes as ordered by the Tax Collector. The type, color and quantity of envelopes will be provided to the vendor prior to their printing schedule. Tax Collector reserves the right to supply envelopes to the vendor and the cost will be reduced accordingly. All envelopes supplied to the vendor will be pursuant to the vendor's specifications.
- **Additional Inserts**
    - If inserts are included in any mailing project and provided/printed by the vendor, a supply may be provided to the Tax Collector. Some inserts are printed by the Tax Collector and shipped to the vendor. Some inserts are provided by a 3rd party and shipped to the vendor. Tax Collector and 3rd party inserts must adhere to vendor guidelines.
- **Reporting**
    - For each mailing project, the vendor is asked to provide the Tax Collector with a detailed postage expense statement. Audit reports detailing record counts and numeric field controls must be provided. Please include at least one sample of any such statements you have provided other customers on similar mailing projects.
- **Sign off of Printed Material**
    - For each project, the Tax Collector's project manager must sign approval of the final proof of all printed forms, brochures, envelopes, etc. before any are printed for the mailings. Only the version approved will be accepted for printing. In addition, a signed approval will be required for a sample of the form with real data printed on it before all notices are printed. Vendor

accepts all liability, both public and financial, for improperly printing or mailing unapproved or erroneous material.

- **Vendor Error**
    - The vendor is responsible for correct execution of the projects. If an error occurs, and the Tax Collector determines that it is the vendor's error, the Tax Collector will determine corrective action, not to exceed a reprint and re-mailing of the pieces in error at the vendor's cost.
- **Cost for missed deadlines**
    - If the vendor is unable to meet the deadlines for mailing as established by the project manager(s), the vendor will be responsible for any additional costs incurred by the Tax Collector in the completion of the project.
    - Additional costs are those in excess of what the project would have cost if it had been completed by this vendor at the rates submitted in this proposal. For example, if another vendor must be used and additional charges for staffing, after hour rates, etc. are required, the Tax Collector will be responsible for only the amount that would have been due according to the contract and the vendor who did not complete the project will be responsible for reimbursing the Tax Collector for the balance.
- **Scan Line/QR or Bar Code**
    - For projects utilizing a scan line, the scan line must be in OCR A font and be of the quality and position to ensure maximum scanning success rate.
    - Alternatively, QR or Bar code may be used; parameters to be provided by the Tax Collector. The documents will be read by an OPEX Falcon remittance processor.
- **Special Processing for Data Groups**
    - Jobs may be broken into multiple groups with various parameters. For example, specific inserts may be included only with those accounts identified by a particular data element.
- **Data Files**
    - For certain projects, an electronic file of the data will be provided by the Tax Collector and will be emailed or transmitted to an FTP site, as instructed by

the vendor. Multiple data files may be provided to complete the job. Variable data printed on the bill may be identified by these files.

- **Unused Materials**
    - Tax Collector will not be responsible for the cost of unused materials or the disposal of unused material ordered for each job. The Tax Collector will consider reimbursing the vendor for the actual cost of excess materials if the Tax Collector provided materially erroneous data upon which the order was based.
- **Project Programming Costs**
    - Each job may require programming services. Most jobs will require only minor changes, if any, year to year after the initial set up. Programming time must be documented. Programming time, in excess of 1 hour per job, can be invoiced in quarter hour increments at the rate on Response Form B.

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3. Proposal Requirements

Proposals should include the following:

1. **Cover Letter** summarizing your firm's interest and understanding of the project.
2. **Qualifications and Experience** including examples of similar work with government or public agencies.
3. **Approach and Methodology** for meeting the Scope of Services and performance metrics.
4. **Project Team** names, titles, and relevant experience of key personnel.
5. **Timeline and Deliverables** for implementation.
6. **Pricing Structure** (On a per record base, as set forth on Form B).
7. **References** (minimum of three clients). If you have any Florida Tax Collector clients, please include those.
8. **Completed Response Form A & B** (found attached to this document)
9. **Foreign Country of Concern Attestation and Human Trafficking Attestation Form**

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4. Evaluation Criteria

The contract shall be awarded to the responsive and responsible bidder submitting the lowest bid price. Preference shall be given to local businesses where applicable.

A tie shall exist when two or more bids are determined to be equal with respect to price, quality and service. Pursuant to Section §287.087 F.S., whenever two or more bids, proposals, or replies that are equal with respect to price, quality, and service are received by the state or by any political subdivision for the procurement of commodities or contractual services, a bid, proposal, or reply received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to qualify as a drug-free business, a *Drug-Free Workplace Certification* must be submitted with the original response.

If both proposers have implemented a drug-free program, and a tie continues to exist, the award shall be made based on random selection

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5. Submission Instructions

All proposals **must** be submitted **electronically,** in PDF format, by **5:00 PM ET on** Thursday, July 9, 2026 to **Purchasing@SarasotaTaxCollector.gov.**

Responses submitted by any other means will not be considered. Late submissions will not be accepted. Responder shall assume full responsibility for timely delivery of the proposal.

Questions may be directed to the same email address with the subject line:
"ITB Inquiry – Mailing Services". No questions or requests for clarification received after 5:00 PM ET July 2nd will be answered. All questions, and respective answers, will be posted online at www.SarasotaTaxCollector.gov/Procurement.

All other unsolicited communications regarding the procurement may subject the bid to disqualification.

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6. Terms and Conditions

Any Purchase Order or Agreement will be subject to the *Tax Collector General Terms and Conditions of Purchase Orders (Sarasota County Tax Collector General Terms & Conditions of Purchase Orders).*

Additionally, the Sarasota County Tax Collector's Office reserves the right to:

- Reject any or all proposals, in whole or in part.
- Request additional information from any respondent.
- Negotiate terms and conditions with the selected vendor.
- Terminate the solicitation process at any time.

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7. Anticipated Timeline

Event	Date
ITB Issued	June 25, 2026
Question Submission Deadline	July 2, 2026
Proposals Due	July 9, 2026
Review Period	July 10-13, 2026
Anticipated Selection (This is an estimated date. If the selection is pushed back, the rest of the dates will be pushed back in equal amounts, and if a deadline falls upon a weekend it shall be calculated to be the following Monday)	July 14, 2026
Inspection/Dispute Period	July 15-21, 2026
Contract Start Date	First Mailing on September 1st. (Vendor must meet this timeframe).

RESPONSE FORM A - GENERAL INFORMATION

Vendor:____

Please answer each of the following questions (attach additional sheets as necessary):

1. What contingency plans are in effect if the production equipment is not functional? Please address disaster recovery.

2. Are all the components for these projects produced at your facility? If not, what components are sub-contracted and with whom?

3. What postal certifications does your company have?

4. From what location (city, state) will the projects be mailed?

RESPONSE FORM B - PROPOSED ITEM COSTS

Vendor____

Based on the stated volumes, please indicate the cost of providing the following services to this office. **If there is no charge, please indicate "NC" on the appropriate line.** If there is a minimum charge, please indicate.

Programming Costs	**Cost**	
Initial Set up	____________	per hour
Modifications	____________	per hour

Project	**Cost**	
Notice of Taxes and Assessments (270,000 records, 222,000 mailed)	____________	per record
Reminder Notice (20,000 records, 15,000 mailed)	____________	per record
Quarterly Installment Notice (4,500 records, 4,000 mailed)	____________	per record
Attorney Tax (700 records/mailed)	____________	per record

Additional Supplies | **Cost per thousand**

#10 Original Envelope (appx. 10,000) ____________________

#9 Return Envelope (appx. 10,000) ____________________

Buck Slip | **Cost**

First Insert ______________ per insertion

Second insert ______________ per insertion

Maximum number of inserts including return envelope? ____________________

SECTION 1: Notice of Ad Valorem Taxes and Non-Ad Valorem Assessments:

A. Mailed by October 31st and consists of:
   1. 8.5” x 11”, 60# white offset, 1 horizontal perforation 3.5” from bottom for detachable stub, printed on both sides.
   2. 8.5” x 11” tax information insert, double sided, folded.
   3. #9 return mail envelope.
   4. #10 or Flat outgoing ailing envelope.
   5. Capability to accommodate additional inserts.

B. Bill form/format will be generally available 15 days prior to the mailing date. (i.e. Information contained on any insert, back of the tax bill and envelope.)

C. The variable information printed on the tax bill will be FTP'd electronically no less than seven (7) calendar days prior to the mailing date.

D. Householding: if a taxpayer has multiple accounts, the individual notices should be mailed together in the same envelope or package, in order to reduce forms and postage costs. The same mailing deadline exists for these items.

E. Proofs shall be submitted prior to mailing to ensure the scan line is in the correct format and is readable.

SECTION 2: Reminder Notice of Ad Valorem Taxes and Non-Ad Valorem Assessments:

A. Mailed by April 15th and consists of:
   1. 8.5” x 11”, 60# white offset, 1 horizontal perforation 3.5” from bottom for detachable stub, printed on both sides.
   2. #9 return mail envelope.
   3. #10 or Flat outgoing ailing envelope.
   4. Capability to accommodate additional inserts.

B. Bill form/format will be generally available 15 days prior to the mailing date (i.e. information contained on the insert, back of the tax bill and envelope).

C. The information to be printed on the tax bill will be made available by electronic file, FTP'd to your specified location no less than 7 days prior to the mailing.

D. Householding: if a taxpayer has multiple accounts, the individual notices should be mailed together in the same envelope or package, in order to reduce forms and postage costs. The same mailing deadline exists for these items.

E. Proofs shall be submitted prior to mailing to ensure the scan line is in the correct format and is readable.

SECTION 3: Quarterly Installment Bills:

A. Mailed quarterly at the end of February, May, August and November, and consists of:
   1. 8.5" x 11", 60# white offset, 1 horizontal perforation 3.5" from bottom for detachable stub, printed on both sides.
   2. #9 return mail envelope.
   3. #10 or Flat outgoing ailing envelope.
   4. Capability to accommodate additional inserts.

B. Bill form/format will be generally available 15 days prior to the mailing date (i.e. information contained on the insert, back of the tax bill and envelope). Note: The March, June and September installments will follow the same format. The December installment will closely mirror the Notice of Ad Valorem Taxes and Non-Ad Valorem Assessments detailed in Section 1.

C. The information to be printed on the tax bill will be made available by electronic file, FTP'd to your specified location no less than 7 days prior to the mailing.

D. Householding: if a taxpayer has multiple accounts, the individual notices should be mailed together in the same envelope or package, in order to reduce forms and postage costs. The same mailing deadline exists for these items.

E. Proofs shall be submitted prior to mailing to ensure the scan line is in the correct format and is readable.

SECTION 4: Attorney Tax Notices:

RENEWAL NOTICE:

A. Mailed by August 15th and consists of:
   1. 8.5” x 11”, 60# white offset, 2 horizontal perforation, divides paper into 3 equally sized notices, printed on both sides.
   2. #9 return mail envelope.
   3. #10 outgoing ailing envelope.
   4. Capability to accommodate additional inserts.

B. The form/format will be generally available 15 days prior to the mailing date (i.e. information contained on the insert, if applicable, back of the notice and envelope).

C. The variable information to be printed on the notice will be made available by electronic file, FTP'd to your specified location no less than 7 days prior to the mailing.

D. Proofs shall be submitted prior to mailing to ensure the scan line is in the correct format and is readable.