

**AGENDA ITEM 36**

Discuss and take appropriate action on proposals received for 2002 tax statement printing.

Bids were received from the following:

*Hart InterCivic, Austin*  
*Information Management Solution, LLC, San Antonio*  
*Myriad Systems, Inc., Oklahoma City, OK*  
*National Presort Services, Inc., Austin*  
*SFI, Round Rock*

Moved: **Judge Doerfler**

Seconded: **Commissioner Heiligenstein**

Motion: To award the proposal for 2002 tax statement printing to Hart InterCivic.

Vote: **3 - 0**

< Attachment >

RFP FOR TAX STATEMENTS.

30-Apr-02

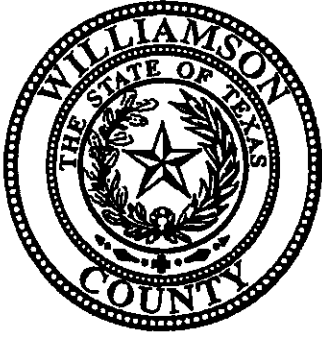
Approved 5-14-02

John C. Daugherty

Hart InterCivic Systems      Myriad Systems      National Presort Svcs

SFI      IMS

PRODUCT/SERVICE	PRICE	PRICE	PRICE	PRICE	PRICE	PRICE
Computer Pre-Processing	\$ -	\$ -	\$75.00	\$10.00/m	\$10.00/m	\$10.00/m
Laser Imaging	\$20.64/M	\$25.00/M	\$28.00/M	\$35.00/m	\$35.00/m	\$38.50/M
Mail Processing	\$27.20/M	\$25.00/M	\$18.00/M	\$35.00/m	\$35.00/m	\$22.50/M
Add'l Inserts	\$6.80/M	\$ -	\$4.00/M	\$15.00/m	\$15.00/m	\$15.00/M
Mail Preparation	\$ -	\$ -	\$ -	\$12.00/m	\$ -	\$ -
CASS/PAVE postal cert./ barcoding/presort costs	\$11.90/M	\$ -	\$4.00/M	\$15.00/m	\$15.00/m	\$20.00/M
Forms - White 20 lb./2 color	\$11.875/M	\$20.25/M	\$23.00/M	\$12.50/m	\$12.50/m	\$17.00/M
Perforation	\$ -	N/C	N/C	\$ -	\$ -	\$5.00/M
Job Programming	\$ -	\$1250.00/Flat	\$ -	\$375.00/Flat	\$ -	\$ -
Minimum job set up time	\$ -	\$ -	\$90.00/Flat	N/C	\$ -	\$ -
Job set up includes?	Forms Set-up	Forms Set-up	Forms Set-up	Forms Set-up	Forms Set-up	Forms Set-up
	Print Set-up	Print Set-up	Print Set-up	Print Set-up	Print Set-up	Print Set-up
Digitize logo, fonts, etc.	\$100.00	\$ -	\$ -	\$ -	\$ -	\$0.00
CD Roms w/ Levy Roll	\$ 800.00			Inc job setup		
				N/A		
Total Charge based on 100K Pieces. W/O Inserts	\$ 7,161.50	\$ 10,400.00	\$ 7,465.00	\$ 12,325.00	\$ 11,300.00	\$ 11,300.00
W/Inserts	\$ 7,841.50	\$ 10,400.00	\$ 7,865.00	\$ 13,825.00	\$ 12,800.00	\$ 12,800.00



**WILLIAMSON COUNTY AUDITOR'S OFFICE  
PURCHASING DEPARTMENT  
710 MAIN STREET - SUITE 303  
GEORGETOWN, TEXAS 78626**

<http://www.williamson-county.org/Procurement>

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## **WILLIAMSON COUNTY PURCHASING DEPARTMENT**

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### **FORMAL REQUEST FOR PROPOSALS**

### **2002 TAX STATEMENT PRINTING**

**NUMBER: 02WC806**

**PROPOSAL OPENING DATE & TIME: April 30, 2002 - 2:00 PM**

<b>PURCHASING CONTACT</b>	<b>TECHNICAL CONTACT</b>
Ginny Atkinson 710 Main Street – Suite 303 Georgetown, TX 78626 (512) 943-1554 <a href="mailto:gatkinson@williamson-county.org">gatkinson@williamson-county.org</a>	Joe Pondrom 710 Main Street - Suite 102 Georgetown, TX 78626 (512) 943-1641 <a href="mailto:jpondrom@williamson-county.org">jpondrom@williamson-county.org</a>

**FOR DETAILED SPECIFICATIONS AND QUESTIONS RELATING TO THE PROPOSAL PROCESS,  
CONTACT GINNY ATKINSON.**

**FOR TECHNICAL QUESTIONS CONTACT JOE PONDROM.**

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## WILLIAMSON COUNTY PURCHASING DEPARTMENT

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### PROPOSAL INSTRUCTIONS/REQUIREMENTS

Proposals must be received in the Williamson County Auditor's Office prior to 2:00 PM on Tuesday, April 30, 2002. At which time the Proposals will be opened in the Williamson County Auditor's Office on the 3rd floor of the County Courthouse. Proposals received after that time will not be opened and will be considered void and unacceptable. As to each item, the Court may either reject all Proposals or award a contract to the lowest and best Proposal.

SEALED PROPOSALS may be hand-delivered to:

Williamson County Auditor's Office  
Attn: Ginny Atkinson - Purchasing  
Third (3rd) floor - Suite 303  
Williamson County Courthouse (on the square)  
710 Main Street, Georgetown, Texas

OR

SEALED PROPOSALS may be mailed to:

Williamson County Auditor's Office  
Attn: Ginny Atkinson - Purchasing  
710 Main Street - Suite 303  
Georgetown, Texas 78626

**ALL PROPOSALS MUST BE SUBMITTED ON THE FORMS PROVIDED IN THIS PROPOSAL DOCUMENT.**

**ALL INFORMATION REQUIRED BY THE PROPOSAL FORM MUST BE FURNISHED OR THE PROPOSAL MAY BE DEEMED NON RESPONSIVE. WHERE THERE IS AN ERROR IN THE EXTENSION OF PRICE, THE UNIT PRICE SHALL GOVERN.**

**ONE (1) ORIGINAL AND THREE (3) COPIES OF ALL PROPOSALS MUST BE SUBMITTED (THIS INCLUDES ALL DOCUMENTATION SUBMITTED WITH THE PROPOSAL). PROPOSALS MUST BE MARKED ORIGINAL OR COPY.**

**ALL PROPOSALS MUST BE RETURNED IN A SEALED ENVELOPE, MARKED WITH THE PROPOSAL NAME, PROPOSAL NUMBER, AND PROPOSAL OPENING DATE & TIME. IF AN OVERNIGHT DELIVERY SERVICE IS GOING TO DELIVER THE PROPOSAL THE PROPOSAL NAME, PROPOSAL NUMBER, AND PROPOSAL OPENING DATE & TIME MUST ALSO APPEAR ON THE OUTSIDE OF THE DELIVERY SERVICE ENVELOPE.**

**FACSIMILE AND ELECTRONIC MAIL TRANSMITTALS SHALL NOT BE ACCEPTED.**

1. It is understood that the Commissioners Court of Williamson County, Texas, reserves the right to accept or reject any and/or all Proposals for any or all materials and/or services covered in this Proposal request, and to waive informalities or defects in the Proposal or to accept such Proposal it shall deem to be in the best interest of Williamson County.
2. Awards should be made within sixty (60) days after the Proposal opening date. To obtain results, or if you have any questions, please contact Ginny Atkinson at (512) 943-1554.

3. **Funding:** Funds for payment have been provided through the Williamson County budget approved by Commissioners Court for the October 1, 2001/September 30, 2002 fiscal year.
  4. **Late Proposal:** Proposals received after submission deadline shall be unopened and will be considered VOID AND UNACCEPTABLE. Williamson County is not responsible for lateness of mail, delivery carriers, etc.
  5. **Altering Proposal:** Proposals cannot be altered or amended after submission deadline.
  6. **Sales Tax:** Williamson County is by statute, exempt from the State Sales Tax and Federal Excise Tax.
  7. **Contract:** This Proposal, when properly accepted by Williamson County, shall constitute a contract equally binding between the successful proposer and Williamson County.
  8. **Changes:** No oral statement of any person shall modify or otherwise change, or affect the terms, conditions, plans and/or specifications stated in the Proposal Package and or Proposal Instructions/Requirements.
  9. **Delivery Times and Locations:** The commodity and/or service covered by this Proposal shall be as stated in the Proposal Package.
  10. **Payments:** Payment shall be made by check from the County upon satisfactory completion and acceptance of items and submission of the Invoice to the ordering department for work specified by this Contract Document. As a minimum, invoices shall include:
    - (1) Name, address, and telephone number of Contractor and similar information in the event the payment is to be made to a different address
    - (2) County contract, Purchase Order, and/or delivery order number
    - (3) Identification of items or service as outlined in the contract
    - (4) Quantity or quantities, applicable unit prices, total prices, and total amount
    - (5) Any additional payment information which may be called for by the contract
- Payment inquiries should be directed to the Auditor's Office, Accounts Payable Department: Donna McKittrick, 943-1558 or Kathy Blankenship, 943-1557.
11. **Conflict of Interest:** No public official shall have interest in a contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.
  12. **Ethics:** The proposer shall not accept or offer gifts or anything of value nor enter into any business arrangement with any employee, official or agent of Williamson County.
  13. **Minimum Standards for Responsible Proposers:** A prospective proposer must affirmatively demonstrate proposers responsibility. A prospective proposer must meet the following requirements:
    - a. have adequate financial resources, or the ability to obtain such resources as required;
    - b. be able to comply with the required or proposed delivery schedule;
    - c. have a satisfactory record of performance;
    - d. be otherwise qualified and eligible to receive an award.

Williamson County may request representation and other information sufficient to determine proposers ability to meet these minimum standards listed above.

14. References: Williamson County **REQUIRES** proposer to supply with this Proposal, a list of at least **three (3) references** where like services have been supplied by their firm. Include name of firm, address, telephone number and name of representative.
15. Proposer shall provide with this Proposal response, all documentation required by this Proposal. Failure to provide this information may result in rejection of the Proposal.
16. Termination for Default: Williamson County reserves the right to enforce the performance of this contract in any manner prescribed by law or deemed to be in the best interest of the County in the event of breach or default of this contract. Non-Performance of the proposer in terms of specifications shall be a basis for the termination of the contract by the County. The County shall not pay for commodities/services which are unsatisfactory. Contractors will be given a reasonable opportunity before termination to correct the deficiencies. This, however, shall in no way be construed as negating the basis for termination for non-performance.
17. Contract Administration: Under this contract, Joe Pondrom, County Chief Deputy Tax Assessor-Collector, shall be the contract administrator with designated responsibility to ensure compliance with contract requirements, such as but not limited to, acceptance, inspection and delivery. The contract administrator will serve as liaison between Williamson County Commissioners Court and the successful proposer.
18. Purchase Order: Williamson County shall generate a purchase order(s) to the successful proposer as products and/or services are required. The purchase order number must appear on all itemized invoices and/or request for payment.
19. Silence of Specifications: The apparent silence of these specifications as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.
20. PROPOSALS MUST BE: legible and of a quality that can be reproduced.
21. Proposal forms that are included in the Proposal package shall be used. **CHANGES to Proposal forms made by proposers shall DISQUALIFY THE PROPOSAL.** Exceptions to the Proposal forms and or specifications shall be made on an **attachment** to the Proposal package. **Call Ginny Atkinson (512) 943-1554 for explanation if exceptions are needed.**
22. Prior to submitting any proposal, proposers are required to read the plans and specifications carefully; to inform themselves by their independent research, test and investigation of the difficulties to be encountered and judge for themselves of the accessibility of the work and all attending circumstances affecting the cost of doing the work and the time required for its completion and obtain all information required to make an intelligent proposal.
23. Should the proposer find discrepancies in, or omissions from the plans, specifications, or other documents, or should he/she be in doubt as to their meaning, he/she should notify at once Joe Pondrom, County Chief Deputy Tax Assessor-Collector, and obtain clarification or addendum prior to submitting any proposal.
24. In case of ambiguity or lack of clarity in the statement of prices in the proposals, the county reserves the right to consider the most favorable analysis thereof, or to reject the proposal. Unreasonable (or unbalanced) prices submitted in a proposal may result in rejection of such proposal or other proposals.

25. Award of the contract, if awarded, will be made within sixty (60) days after opening of the proposals and no bidder may withdraw his proposal within said sixty (60) day period of time unless a prior award is made.
26. Any quantities given in any portion of the contract documents, including the plans, are estimates only, and the actual amount of work required may differ somewhat from the estimates. The basis for the payment shall be the actual amount of work done and/or material furnished.
27. **THE TEXAS HAZARD COMMUNICATION ACT**, Chapter 502 of the Health and Safety Code, Sec. 502.006, states that a chemical manufacturer or distributor shall provide appropriate Material Safety Data Sheets (MSDS) to employers who acquire hazardous chemicals in this state with each initial shipment and with the first shipment after a MSDS is updated. The MSDS must conform to the most current requirements of the OSHA standard in 29 CFR 1910.1200. By submitting your bid to the County you are acknowledging that this regulation is a part of this bid and that you will provide appropriate MSDS with each initial shipment and with the first shipment after a MSDS is updated.
28. **THE WILLIAMSON COUNTY HAZARD COMMUNICATION PROGRAM POLICY** Under Revised Texas Hazard Communication Act (THCA) of 1993 states that it is the responsibility of all contractor/sub-contractors who bring hazardous chemicals onto county property to provide appropriate MSDS to the county at the work site. When exposure to a hazardous chemical is expected each contractor/sub-contractor shall be responsible for the appropriate training of their employees. For a copy of the Williamson County Hazard Communication Program Policy contact the Williamson County Unified Road & Bridge System Safety/Training Coordinator at 512/930-3330. By submitting your bid to the County you are acknowledging that this policy is a part of this bid and that you will provide appropriate MSDS to the county work site and provide for appropriate training as applicable.

**PUBLIC NOTICE  
WILLIAMSON COUNTY  
REQUEST FOR PROPOSALS**

**The Williamson County Commissioners Court invites the submission of sealed Proposals for:**

**2002 TAX STATEMENT PRINTING**

**Sealed Proposals will be publicly opened in the Williamson County Auditors Office, 3rd Floor – Suite 303, Williamson County Courthouse, Georgetown, Texas on Tuesday, April 30, 2002 at 2:00 PM.**

**Detailed specifications may be obtained by calling Ginny Atkinson at (512) 943-1554 or by visiting the Williamson County Procurement web site.**

**<http://www.williamson-county.org/Procurement>**

**The Williamson County Commissioners Court reserves the right to accept the lowest and best Proposal as deemed by the Court, or reject any and/or all Proposals.**

**Issued by order of the Williamson County Commissioners Court on April 9, 2002.  
John C. Doerfler, County Judge.**



**PROPOSAL CHECK LIST**

**Please check the following prior to sealing and submitting your proposal.**

- 1. Official Williamson County Proposal Form Completed, signed, and enclosed?**

**YES**   X   **NO**       

- 2. All proposal specification sheets completed (including company name at bottom of each sheet) and attached?**

**YES**   X   **NO**       

- 3. Have you included and marked (original or copy) four (4) complete proposal sets as required?**

**YES**   X   **NO**       

- 4. Have you written the name of your business on the front of the sealed envelope?**

**YES**   X   **NO**       

- 5. Have you written the Proposal name, Proposal number, and Proposal opening date & time on the front of the sealed envelope?**

**YES**   X   **NO**       

- 6. Are you using an overnight delivery service to deliver your proposal? If you are have you written the Proposal name, Proposal number, and Proposal opening date & time on the outside of the delivery service envelope?**

YES   X                        NO

**WILLIAMSON COUNTY PROPOSAL FORM****2002 TAX STATEMENT PRINTING**

NUMBER: 02WC806

PROPOSAL OPENING DATE &amp; TIME: April 30, 2002 - 2:00 PM

The undersigned, by his/her signature, represents that he/she is authorized to bind the proposer to fully comply with the terms and conditions of the attached Request for Proposal, and Specifications for the amount(s) shown on the accompanying Proposal sheet(s). By signing below, you have read the entire document and agreed to the terms therein.

NAME OF PROPOSER: Hart InterCivicMailing Address: PO Box 80649City: Austin State: Texas Zip: 78708-0649Email Address: droberts@hartic.comTelephone: ( 512 ) 252-6700 Fax: ( 512 ) 252-6535

Signature of Person Authorized to Sign Proposal

Date of Proposal: 4-29-02Name and Title of Signer: Deborah L. Roberts, Director Print Solutions  
(Please Print or Type)**PLEASE COMPLETE THE FOLLOWING:**☐ "all or none" basis. (Will accept award of "all" items only. If left blank, low item will apply.)☒ low item basis. (Will accept award on "any or all" items.)

List Additional Limitations if applicable: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**DO NOT SIGN OR SUBMIT THIS FORM**  
**WITHOUT READING ENTIRE DOCUMENT**

**THIS FORM MUST BE COMPLETED, SIGNED AND RETURNED WITH BID**

# **WILLIAMSON COUNTY PROPOSAL SPECIFICATIONS/PROPOSAL SHEETS**

## **2002 TAX STATEMENT PRINTING**

PROPOSAL NUMBER: 02WC806

PROPOSAL OPENING DATE & TIME: APRIL 30, 2002 - 2:00 PM

In anticipation of the 2002 tax collection process beginning August, 2002 the Williamson County Tax Office is seeking proposals from qualified vendors for processing of tax statements by October 1, 2002. The proposal shall include, but is not limited to the processing, printing, and mailing of tax statements and producing CD ROMS containing copies of the Levy Roll, Mortgage Company Tax Statements, Individual Tax Statements, and Tax Statements produced electronically for mortgage companies.

Based on the following assumptions, please answer the following questions:

- Maximum 150,000 custom stock w/perf for Year 2002
- Minimum 121,000 custom stock w/perf produced for Tax Year 2000
- 1999 – 2885 mortgages statements printed
- 2000 – 121,000 tax statements mailed

*See Answers to all the following questions on the page 3 & 4 following the price schedule.*

1. How long has your company been in business?
2. Have you produced property tax statements and tax rolls before?
3. What other tax agencies have you worked for? List any references we may contact.
4. Have you worked with The Software Group's software before?
5. Does your shop work on a "first in-first out" basis or do you give preference to some of your clients?
6. Estimated total turn around time to mail statements from receipt of computer tapes?
7. How do you handle mortgage statements when produced?
8. How do you prefer we transfer tax envelopes?
9. Prefer estimate of postage costs prior to mailing?
10. Turn around time for postal overage refund?

**PRICE SCHEDULE****PRODUCT/SERVICE****PRICE**

Computer Pre-Processing

\$                     .00

Laser Imaging

\$           2,064.65

Mail Processing

\$           2,720.00

Additional Inserts

\$           680.00

Mail Preparation

\$                     .00CASS/PAVE Postal Certification./  
Barcoding/ Presort Costs\$           1,1190.00

Forms – White 20 lb./ 2 Color

\$           1,687.50

Perforation

\$                     .00

Job Programming

\$                     .00    Minimum job set-up time          0     hours\$                     .00

Job set-up includes?

Digitize logo, fonts, etc.

\$                     .00

CD-ROM tax statements &amp; Levy Rolls

\$           800.00

1. How long has your company been in business?

Hart InterCivic has 88 years of experience in the printing business and for over 13 years we have delivered comprehensive printing/mailing services to appraisal districts and tax offices throughout Texas.

2. Have you produced property tax statements and tax rolls before?

Yes, we have produced tax statements and tax rolls for several counties for many years.

3. What other tax agencies have you worked for? List any references we may contact.

See reference list on the next page.

4. Have you worked with The Software Group's software before?

Yes, for example: Brazos County Appraisal District, Lee County Tax Office, and Milam County Appraisal District. See reference list on next page for contact information.

5. Does your shop work on a "first in-first out" basis or do you give preference to some of your clients?

Typically we work on a "first in-first out" basis but also, due to some time requirements and timing restrictions we try to work within each customer's requirements.

6. Estimated total turn around time to mail statements from receipt of computer tapes?

Five working days from receipt of complete information/tape.

7. How do you handle mortgage statements when produced?

Print and deliver back to Williamson County unless Mailing Services are required. Mailing services would run your information through a Cass/Pave verification program to insure adding bar code, postage discounts and address corrections. Then the information is printed on the statements. Hart's intelligent mailing software automatically sorts same address information so that multiple properties would get inserted into a single envelope rather than sorted and stuffed separately. If additional items need to be included in the mailing, those inserts can be inserted at the same time as the statement stuffing. Then envelopes are bagged, tagged and put into mail trays for the post office. Hart delivers to the post office with all required paperwork. Hart will create the copies of the Levy roll and the tax statements on CD-ROMS.

8. How do you prefer we transfer tax envelopes?

Tax envelopes can be delivered from 8:00 am to 5:00 pm weekdays to our warehouse in Travis County. The other option rather than transferring envelopes is to allow Hart to print your tax envelopes.

9. Prefer estimate of postage costs prior to mailing?

Estimated postage payable to the "US Postmaster", received five days prior to mail out is preferred.

10. Turn around time for postal overage refund?

Any overpayments will be credited on the invoice for services provided.

**References**

Mary Landreth  
Brazos County Appraisal District  
1673 Briarcrest #A 1010  
Bryan, Texas 77802  
(979) 774-4100

Virginia Jackson  
Lee County Tax Office  
170 E. Industry  
Giddings, Texas 78942  
(979) 542-2640

Pat Moran  
Milam County Appraisal District  
PO Box 769/ 120 N. Houston  
Cameron, TX 76520  
(254) 697-6638

Steve Hulihan  
Polk County Tax Office  
416 N. Washington  
Livingston, Texas 77351-2899  
(936) 327-6801

Billy Beyer  
Tax Appraisal District of Bell County  
P.O. Box 390  
Belton, Texas 76513-0390  
(254) 939-5841

David Luther  
Jasper County Appraisal District  
137 N. Main Street  
Jasper, Texas 75951  
(800) 256-5093

Bill Carroll/Kimberly Gamboa  
Williamson County Appraisal District  
510 West 9<sup>th</sup> Street/ PO Box 1120  
Georgetown, TX 78627-1120  
(512) 930-3787

**AGENDA ITEM 37**

Consider approving the disbursement report for the Williamson County School Lands.

Moved: **Commissioner Heiligenstein**

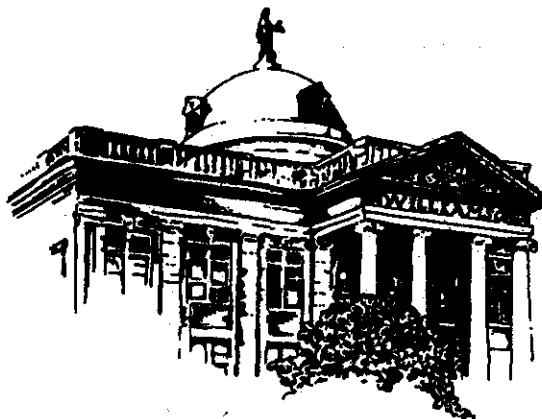
Seconded: **Commissioner Hays**

Motion: To approve the disbursement report for the Williamson County School Lands.

Vote: 3 – 0

< Attachment >

**John C. Doerfler**  
County Judge  
Williamson County



WILLIAMSON COUNTY COURTHOUSE  
710 MAIN, SECOND FLOOR  
GEORGETOWN, TEXAS 78626  
PHONE (512) 943-1550  
FAX (512) 943-1662

May 6, 2002

**TO:** *Williamson County Commissioners Court*

**FROM:** *Jane Tableriou*

**RE:** *Available School Land Disbursement*

**cc:** *Vivian Wood, County Treasurer*  
*David Flores, County Auditor*  
*Kathy Wierzowiecki, Audit Department*  
*Julie Kiley, Financial Director*  
*Arlena Percival, Internal Auditor*

*Attached please find the disbursement report for the Williamson County School Lands.*

*These funds were last disbursed in June of 2000 for the 1999 school year. Funds were not distributed in 2000. This report covers school year 2000 and 2001.*

*It has been the custom to distribute funds using the average daily attendance numbers from Sept 30<sup>th</sup> of each year.*

*The total amount of money we have to disburse is \$275,146.*

*Year 2000=\$103,108.*

*Year 2001=\$172,038.*

*When funds were distributed in 1999 an error was made in calculations and Liberty Hill ISD did not receive their full share. The amount due, \$3403. is being paid out of the year 2000 funds.*

*Please review the report and let me know if you have any questions. This will be on the agenda for May 14, 2002 for approval.*

*approved 5-14-02*  
*John C. Doerfler*