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InfoSend, Inc. Response to:

CITY OF CLEARWATER, FL
UTILITY BILLING AND LOCKBOX SERVICES
13-25

Due: February 19, 2025

Time: 10:00 PM EST

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TAB 1 – Letter of Transmittal

A. The proposer's understanding of the scope of services to be performed.

February 19, 2025

City of Clearwater, FL
Procurement Division
PO Box 4748 33758-4748
Clearwater FL

Re: 13-25 UTILITY BILLING AND LOCKBOX SERVICES

To the Review Team:

InfoSend, Inc. is pleased to present this response to the City of Clearwater, FL. InfoSend, Inc., founded in 1996, is a privately held California corporation with a mission to provide the best possible Customer Communications Management (CCM) platform while still maintaining a client-focused company culture. Now delivering more than 250 million print and electronic documents annually across multiple channels, InfoSend proudly maintains an industry best client retention and satisfaction rate.

InfoSend has never been purchased by or taken funding from a Private Equity or Venture Capital firm. InfoSend's initial startup capital was provided by its CEO and all growth since that point has been funded by using bank loans and the company's own profits. This continuity of ownership has provided our clients with a stable partner because the company's priorities never change. Our primary mission is to provide high quality service and support that leads to long term relationships with our clients. Many firms in our industry purchase market share by offering services at or slightly above cost only to later sell the company to an investment firm. InfoSend has taken the opposite approach by bidding attractive yet sustainable fees in exchange for high quality services with a low risk of ownership changes and the service degradations that often result from those changes when new owners slash costs to create a return on their investment.

InfoSend provides a comprehensive outsourced bill printing, mailing, and eBilling/payments setup to over 800 clients nationwide. InfoSend's team is confident that our offering and benefits presented herein will provide the City of Clearwater and its customers with the greatest value in the market today. InfoSend meets or exceeds the requirements specified in the scope of work, and additional to quoting services pertaining to the requirements we have also included supplemental information about our processing setup, data security, and bill print/mail solution. We propose to provide the City of Clearwater's print and mail services from our InfoSend Florida facility without the use of subcontractors for any portion of the production, including disaster recovery. InfoSend has five production facilities strategically positioned across the country and has provided detail on each location in this response document.

Key Advantages of InfoSend

- Company culture prioritizes client satisfaction, leading to **industry best client retention and satisfaction rate**.
- **Over 240 employees across multiple states**, with high employee retention ensuring clients are handled with consistent knowledge and care.
- **Local Florida based service** with mail being processed in Fort Myers, FL just 2 hours south of Clearwater.
- Wholly owned and operated out of **5 regional production facilities**. We never use subcontractors to sub excess printing volume out to other vendors.
- Modern Electronic Billing, Payment and Presentment platform, with **PCI-Level 1 certification**, IVR and SMS.
- Specializes in **supporting 650+ utility clients nationwide**, out of our 800+ clients.
- InfoSend is CIS agnostic and has interfaced with more than 50 different CIS platforms, including Harris Computer CIS. InfoSend has expertise in implementing and supporting clients operating Harris software and has **over 140 clients operating on a Harris platform** including many Cayenta users.

- **26+ years of expertise working with the USPS**, guaranteeing the lowest cost presort and most efficient setup, never marking up postage from USPS rates.

- **Excellent account management tools** and personnel with continued attention to cost savings.

- **No need to order preprinted stock**, due to our full color duplex variable printing capabilities and customer targeted messaging.

- InfoSend is vertically integrated and **manufactures our own #10 outgoing and #9 return envelopes**

- **Capacity to handle both high-volume and low-volume**, specialized print and mailing requests with fast turn-around times.

- **PCI DSS Level 1 Compliant and SOC 2 Type I & II Audited** as well as other regulatory compliance.

Summary

The InfoSend solution is a complete, proven technology practice that includes print/finish/mail services, and an enhanced print and delivery process. InfoSend provides unequalled technical support, based on our proven experience and significant investment in staff and R&D roadmap. We believe that efficiencies can be improved by introducing new thoughts and ideas. We are proud to say that in 28 years we have never had a public agency client discontinue services with InfoSend due to programming, production, quality, customer service, or operational issues. We think that makes us pretty unique in our industry.

InfoSend's Customer Communications Management (CCM) platform distributes critical documents across multiple channels, including InfoSend's own manufacturing environments in Texas, California, Illinois, Florida and Massachusetts for Data Processing, Printing and Mailing (DPPM). InfoSend's hosted Electronic Billing, Presentment and Payment (EBPP) applications drive the customer remittance process with web, IVR, SMS and Bank BillPay payments. The cloud-based, Software as a Service (SaaS) approach allows InfoSend to refine offerings without client-side installed software or maintenance, as well as providing for flexible integrations to existing systems or vendors.

InfoSend is capable and eager to meet the requirements as laid out in this proposal, leveraging our experience and focus on client satisfaction. Further, the commitment to evolving the services ensures that a partnership with InfoSend will help your organization evolve with the continually changing landscape of consumer communication, interaction, and payments.

Thank you for the opportunity.

Russ Rezai
President
Email: russ.r@infosend.com
Office: 714.993.2690 x233

Marty Bielecki
Sales Executive
marty.b@infosend.com
Mobile: 239.247.4419

B. A clear and positive commitment to deliver the requested services, specifying which utility billing service is being proposed (e.g., Part 1: Utility Billing Services - Printing, Processing, and Mailing and/or Part 2: Utility Lockbox Services – Remittance Processing).

InfoSend Document Design Services

InfoSend is responding to Part 1 of this RFP providing Utility Billing Services – Printing, Processing and Mailing.

InfoSend's Account Managers are trained in the use of various graphic design tools which are leveraged to create your documents. The Account Manager assigned to this project will work with the client's project team to create outputs which meet the high standards expected by our clients. Wherever possible we will look to provide suggestions to improve the look, feel, readability, and/or response rate for your custom communications using our extensive experience in a wide-variety of industries. All of the graphic design work for your projects will be conducted in-house at InfoSend allowing for us to maintain a high level of quality and responsiveness to your requirements.

InfoSend maintains a wide array of printing and finishing equipment necessary to handle transactional and promotional document production, including:

- Grayscale and full-color laser printers
- Full-Color Inkjet printer
- High-capacity offline folding equipment
- High-capacity industrial cutting equipment
- Variable speed mail inserting equipment
- Proprietary and licensed software solutions for processing data, creating client outputs, maintaining USPS compliance
- Full compliance with any OCR, barcode or remittance specification, including lockbox testing with the delivery of production samples prior to Go-Live.

Often InfoSend will consult to provide clients with best practices and design options which leverage the data and printing technology to their fullest. InfoSend's design team can assist in making sure a utility statement has information hierarchy, appropriate use of color and white space, as well as innovative graphics.

InfoSend provides document composition services for **hundreds of utilities nationwide**. Below is an example design which is using the latest in customer insights, preferences and printed output technology.

Front:

UTILITY SERVICES STATEMENT

CITY OF TUCSON — FOUNDED 1775

PIMA COUNTY WASTEWATER RECLAMATION

Last Bill	Payments/Credits	Deposits	Adjustments	Balance Forward	Current Charges	Amount Due
$138.43	-$138.43	$0.00	$0.00	$0.00	$122.94	$122.94

Bill Date	Service Period	Due Date
06/18/20	05/19/20 to 06/17/20	07/08/20

JANE SAMPLE
ACCOUNT NUMBER
123456-123456
1234 E SAMPLE ST
AMOUNT DUE:
$122.94
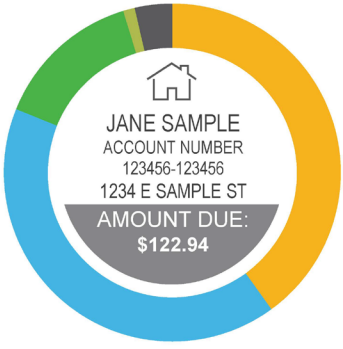
SEWER	WATER	ENVIRON. SVC.
$49.29	$50.28	$17.58
Phone: 520-724-6609	Phone: 520-791-3242	Phone: 520-791-3171
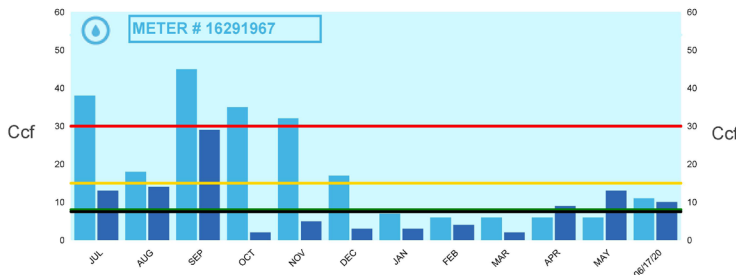
GREEN STORMWATER	MISCELLANEOUS
$1.30	$4.49
	Breakdown of charges on reverse

METER # 16291967

Ccf

JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY 06/17/20

CURRENT USAGE
LAST YEAR USAGE

Projected Next Read: 07/17/20

VOL	0-7	at $2.07/Ccf
VOL	8-15	at $3.82/Ccf
VOL	16-30	at $8.39/Ccf
VOL	31+	at $12.93/Ccf
Annual Residential AVG. = 8 Ccf		

Cycle - Route	Current Read	Previous Read	Usage (Ccf)
13-53	961	951	10

Water Usage	In Gallons	In Ccfs (1 Ccf = 748 Gallons)
Current Usage:	7480	10
Last Year Usage:	8228	11

Please fold on perforation before tearing and return bottom portion with your payment.
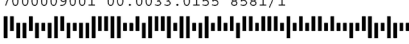
UTILITY SERVICES STATEMENT
PO BOX 27210
TUCSON, AZ 85726-7210

Service Period	Due Date	Account Number
05/19/20 to 06/17/20	07/08/20	123456-123456

Pay online at: www.tucsonaz.gov/pay-utility-bill
Pay by phone: 520-791-3242

Service Address: 1234 E SAMPLE ST

Optional Open Space/Riparian Donation	Amount Due	Amount Paid
☐ $2.00	$122.94	$
☐ $5.00		
☐ $10.00		
☐ $_____		

Additional information on reverse

Addressee

TUA0618A   8581 1 AV 0.389
7000009001 00.0033.0155 8581/1

JANE SAMPLE
1234 E SAMPLE ST
TUCSON AZ 85711-3802

Please Make Checks Payable And Remit To

CITY OF TUCSON
PO BOX 52771
PHOENIX, AZ 85072-2771

00012340500067891200000342567

Back:

Utility Bill Design Highlights:

- Information hierarchy based on customer feedback, ensuring Amount Due and Due Date are very clear. Amount Due is placed strategically in multiple locations.

- Color schemes are utilized to enhance labeling of various services and/or charges.

- Usage and historical information are given prime real estate.

- A dynamic message area for clients to place customizable messages to all customers or customers falling under specified criteria.

- Graph done in a circular manner, utilizing multiple colors to communicate the various charges that lead to the total.

- Backside of the bill utilized to communicate details of charges and payment options, labeled with different colors by channel.

- We offer multilingual support and are able to present bills in multiple languages.

Data Processing, Print and Mail Reporting

InfoSend's Customer Communications Management (CCM) platform provides clients with the necessary reports to reconcile and receive updates throughout the Data Processing, Print and Mail (DPPM) process. InfoSend standard reporting workflow is provided by default, and is able to provide certain reports in a variety of methods including text files, comma delimited files, HTML formatted reports and in some cases, PDFs.

All reports are available either through the InfoSend website and can also be emailed or transmitted via secure FTP. In addition, clients have the capability of assigning internal contacts that have permissions to access/receive reports.

File Transfer Acknowledgement Report

Upon client upload of a data file for processing, InfoSend will send the File Transfer Acknowledgement Report as certification of receipt of the file. The File Transfer Acknowledgement Report provides information about the file name, byte size, page/record count and file receipt date. This report is posted to InfoSend's secure web portal for viewing and is also commonly emailed to designated client staff members.

Process Summary Report

The Process Summary Report is a detailed PDF document that summarizes key data points contained within a document run batch. If a client chooses to review sample files prior to printing, the Process Summary Report will be included as a cover page within each set of samples. It is also posted to InfoSend's "Reports" tab of the web portal in PDF form. The Process Summary Report details important information such as data files that were included within the job, document details such as page count and batch amount if documents are bills, print output information, suppressions, inserts included, and USPS presort counts and estimated postage.

Process Confirmation Report

The Process Confirmation Report is emailed to designated client staff members as well as posted to the reports section of the web portal after documents have been completed for mailing and released to the USPS. This report provides confirmation that InfoSend has released a job's mail pieces to the USPS for mailing. The Process Confirmation Report can be created in one of three different formats: plain text, XML or HTML.

This report provides the name of the file(s) mailed along with a detailed mail count. For statements, invoices and other financial documents, the total dollar amount is also provided. Additional information can be provided after the "totals" section of the report. For example, addresses that could not be verified for delivery point validation can be listed at the end of this report.

Job Tracking Tool

The Job Tracker provides the current status of jobs as it progresses through InfoSend's data processing and print production departments. The Job Tracking tool contains details such as job type, number of component files that are contained within the job, file receipt timestamps, sample files that may be downloaded and the status of printing/quality control/mail preparation. Once a file has been completed for mailing and mail pieces have been released to the USPS a timestamp of file completion confirmation will be provided. InfoSend provides a history of the past 100 jobs that were processed through the system.

Address Update Report

Address Updates including NCOALink hits or ACS updates are provided in InfoSend's reporting section. The ACS/NCOALink report is available in three formats: plain text comma delimited, XML or HTML. Most address update reports are either comma delimited or XML formatted so that InfoSend's clients can automate the process of loading updates into their customer information system.

Address Updates

You may view your ACS/NCOA reports by clicking on the corresponding links.

Date	Jobcode	Viewed
2014-03-20 12:10:45	N_DLY0319A	☐
2014-03-14 16:54:16	N_DLY0313A	☐
2014-03-07 13:06:08	N_DLY0306A	☐
2014-03-04 16:50:55	N_DLY0304A	☐

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	MailSequenc	MailerID	JobCode	AccountNum	OAddr1	OAddr2	OCity	OSt	OZip	MAddr1	MAddr2	MCity	MSt	MZip	COAType	Reason
2	700003880	107315	INF0307A	000000-01	123 Water St		WOODLAND	CA	91364	123 Water St		Woodland Hi	CA	91367-4545	NCOA	
3	700004170	107315	INF0307A	000000-02	4240 E La Palma		LOS ANGELE	CA	90011-5518	4240 E La Palma		Los Angeles	CA	90011-3329	NCOA	
4	700004156	107315	INF0307A	000000-03	5454 Main St		LOS ANGELE	CA	90011-3721	5454 Main St		LOS ANGELE	CA	90011-3721	UAA	491:ZIP+4 coded but failed DPV because of invalid primary
5	700004182	107315	INF0307A	000000-04	456 Water St		TORRANCE	CA	90501	456 Water St		TORRANCE	CA	90501	UAA	411:Invalid Primary Number
6	700004080	107315	INF0307A	000000-05	124 Water St		LOS ANGELE	CA	90013	124 Water St		LOS ANGELE	CA	90013	UAA	491:ZIP+4 coded but failed DPV because of invalid primary
7	700004048	107315	INF0307A	000000-06	4241 E La Palma		LONG BEACH	CA	90802	4241 E La Palma		LONG BEACH	CA	90802	UAA	491:ZIP+4 coded but failed DPV because of invalid primary
8	700003938	107315	INF0307A	000000-07	5455 Main St		LOS ANGELE	CA	90007	5455 Main St		LOS ANGELE	CA	90007	RETURN-UAA	V - Vacant
9	700003967	107315	INF0307A	000000-07	5455 Main St		LOS ANGELE	CA	90007	5455 Main St		LOS ANGELE	CA	90007	RETURN-COA	
10																

BankUp Lockbox Services

InfoSend partners with BankUp Corporation to provide Accounts Receivable and Accounts Payable automation for clients. Bank Up provides comprehensive solutions to assist municipalities, government agencies, utilities, financial institutions, healthcare providers, property managers, insurance companies and other commercial customers in managing and mobilizing funds, reducing operating costs and improving operational efficiencies while increasing customer satisfaction. The InfoSend/BankUp partnership enables billers to process payments through either an outsourced lockbox solution or on-premise utilizing Bank Up's proprietary technology.

BankUp Solutions

- Outsourced Lockbox Processing provides billers with a secure, reliable location to have payments mailed and processed. Payments are guaranteed to be processed and funds deposited to biller banks the same day that payments are received

- All payments processed are electronically uploaded via Check 21 to biller banks each day

- All payments are placed into an electronic payment file and uploaded each day to the biller's CIS

- All processed payments (remittances and checks) are available online through the BankUp Customer Service Interface/Image Archive

- eLockbox provides a solution for billers to receive electronic deposits of customers' home banking bill-pay checks from thousands of financial institutions instead of paper checks with no accompanying remittance document. These payments become part of the daily payment file upload to the biller's CIS

- FLEXRPS is Bank Up's on-premise solution which provides all of the same capabilities as lockbox except that payments are processed by the biller utilizing Bank Up's proprietary technology

- Advanced Invoice Data Capture provides an outsourced solution for those billers looking to automate the AP process. BankUp's solution provides automation to improve efficiencies, reduces invoice processing time, provides approval automation and uploads AP data into any ERP or accounting system

BankUp works closely with InfoSend and their billers to define the bill presentment parameters, create and test all printed documents to ensure feasibility of integrating with all Bank Up processing technology.

C. The names of key personnel, representatives, and project managers who will serve as primary contacts for the City regarding these services.

InfoSend's Key Support Personnel
InfoSend's mission to provide the industry-best support requires excellence and attention to detail within the Client Services (CS) department. InfoSend has designed support around extensive procedural controls to ensure client output is handled accurately and issues are addressed expeditiously. If InfoSend is awarded this contract, we will at that point assign a dedicated Account Manager to work on the implementation project. This Account Manager will remain the main point of contact throughout the implementation and will also be available after go-live for ongoing maintenance or improvement projects.

Executive Management and Sales:
InfoSend designated Contract Administrator: Russ Rezai, President
InfoSend designated Contract Manager: Matt Schmidt, COO
InfoSend sales contact: Marty Bielecki

Delivery Team:

- **Executive Management and Sales Team**: will serve as the main contact for RFP questions and contract negotiations.

- **Client Services Team**: manage ongoing processing, and will be main points of contact during the new client implementation process. Primary and secondary Client Services contacts will be assigned during the contracting phase if InfoSend is selected as the successful vendor. These contacts will report directly to Matt Schmidt, COO and Josue Martinez, Director of Client Services.

Name	Matt Schmidt
Experience	**InfoSend, Inc.** Anaheim, CA (2007 – present) Chief Operating Officer • Manages Operations for InfoSend's 4 facilities • Manages Client Services team responsible for all client implementation and support • Works with management team on new product planning, development and support • Works on strategic planning for operations including new technologies and services **InfoSend, Inc.** Anaheim, CA Director, Client Services • Supervise employees and operations of the Client Services, Quality Control and Direct Communications departments. Provided consultative solutions for prospect and clients. • Develop, monitor and improve client implementation and support procedures. • Coordinate and implement internal cross-functional processes in an environment of continuous improvement. • Work with executive management to develop and evaluate long-term strategies to achieve organizational goals.
Education	MBA - University of California, Irvine BA - California State University, Chico

Name	Josue Martinez
Experience	**InfoSend, Inc.** Anaheim, CA (2016 – present) Director, Client Services - Responsible for all implementation and support services - Oversee Account Management and dedicated support staff - Act as escalation point for InfoSend clients - Design new printed bill formats **InfoSend, Inc.** Anaheim, CA (2000 – 2016) Senior Project Manager - Managed over 75+ implementations and software conversions - Design new printed bill formats - Work with programming team to streamline processes - Data Processing, printing, Quality Control, and mailing experience.
Education	BA, Business Administration concentrating in Information Systems, California State University Fullerton. Proficient in Website/Forms Design using Following Applications/Languages: HTML, Crystal Reports, Adobe Illustrator, Visual Basic and MS Visual FoxPro

Name	Bob Woods
Experience	**InfoSend, Inc** Carrollton, TX (2014-present) Senior Account Manager - Manage new client implementation projects in a variety of verticals - Provide ongoing personal support to clients - Coordinate between clients and internal departments to ensure compliance with best practices and procedures **DataProse, Inc** Coppell, TX (2011-2014) Strategic Account Manager - Responsible to build relationships and maintain Clientele - Manage internal and external client relationships - Ensure prompt issue resolution, client education and communications. - Responsible for knowing client's business as well as the client's objectives and challenges. **CSG Systems, Inc.** Coppell, TX (2010-2011) Senior Account Manager - Serves as main contact between CSG and client base of 90 - Works closely with other departments to ensure quality of product, timeliness of delivery and client satisfaction - Plans and manages project timelines, budgets and priorities
Education	MBA Candidate, University of Phoenix BA, Marketing and Management, Long Island University, Long Island, NY

Name	Christopher Gaber
Experience	**InfoSend, Inc.** Anaheim, CA (2013 – present) Developer, IT • Developed and updated client data processing programs and set up reports for client mailings, including top clients. • Helped maintain and debug complex in-house tools related to electronic payments, automated data processing, postal submissions, and internal reporting tools. • Trained new team members Received excellent ratings in all categories on year end reviews. Resulted in a promotion from Level I to Level III.
Education	Bachelor of Science in Computer Science, 2012 Cal State Fullerton

Name	Marty Bielecki
Experience	**InfoSend, Inc.** Fort Myers, FL (2019 – Present) Sales Executive • Business Development for Data Processing Print Mail (DPPM) & Electronic Bill Presentment and Presentation (EBPP) services and solutions. • 20+ years' experience in Healthcare and Utility business process outsourcing • Consult with customers on strategic solutions, best practices and cost saving methods relating to print mail production, electronic billing, and online payments. • Provided consultative solutions for prospects and clients • Analyze legacy workflows, evaluate options, and recommend ways to improve systems • Develop strong relationships, foster partnerships, and create opportunities for growth **Southwest Direct, Inc.** Fort Myers, FL (2012 – 2019) President **Southwest Direct, Inc.** Fort Myers, FL (2006 – 2012) VP Business Development **Southwest Direct, Inc.** Fort Myers, FL (2002 – 2006) Director Business Development
Education	MBA, University of Florida BS, University of Florida

TAB 2 – Demonstrated Experience Providing Requested Services

Provide a statement that highlights your qualifications, capabilities, and extensive experience in delivering the requested services. Detail your proven track record in managing similar projects, emphasizing successful outcomes, and showcasing your ability to meet the specific requirements of this contract. Include relevant examples of past projects and/or any unique expertise your team brings to ensure the successful delivery of these services.

InfoSend has taken the time to thoroughly understand the scope of work detailed in the City's Utility Billing RFP document and is ideally suited to perform all the functions associated with it. The scope the City requires is very much like the work InfoSend performs for over 650 utility clients nationwide. Not only can InfoSend perform all functions currently required by the City in accepting PDF file transfers, but we can also work with the City to develop a new billing format design to accommodate history bar charts and graphs or other means of displaying complex analytical information. The InfoSend design team has helped hundreds of utility clients make their billing statement more useful and easier to read and understand through the use of charts, graphs and tables that display variable customer billing data. All this while enhancing the image the City wants to convey to its customers.

Lastly and most importantly, InfoSend has been providing this service to the City of Clearwater for the past 7 years and is therefore very familiar with the needs and requirements for this project. InfoSend is uniquely positioned and experienced to continue providing this service. We are also the lowest risk option since there will be no staff resources dedicated to migrating to a new vendor, potential delays, errors or implementation associated costs.

Get to Know InfoSend - A Reliable Partner

InfoSend has provided business process outsourcing services since 1996, handling the processing and distribution of over 250 million critical documents annually for industries throughout the United States. Utilizing the most current technology, InfoSend's Customer Engagement platform offers a single source provider to reach customers with effective and timely interactions.

InfoSend's Customer Communications Management (CCM) platform distributes critical documents across multiple channels, including InfoSend's own manufacturing environments in California, Texas, Illinois, Florida and Massachusetts for Data Processing, Printing and Mailing (DPPM). InfoSend's hosted Electronic Billing, Presentment and Payment (EBPP) applications drive the customer remittance process with web, IVR, SMS and Bank BillPay payments. The cloud-based, Software as a Service (SaaS) approach allows InfoSend to refine offerings without client-side installed software or maintenance, as well as providing for flexible integrations to existing systems or vendors.

Integrity is at the core of InfoSend, with a stated goal to retain and provide complete satisfaction for each client. InfoSend has over 240 employees across multiple states, and the company culture has led to high employee retention, affording clients familiarity and quality service. From our internal operations, to how we support our valuable clients, InfoSend's client-focused service has led to an industry-leading client retention and satisfaction rate.

InfoSend's Data Processing, Print & Mail Solutions

InfoSend, as a single source provider of Customer Communications Management (CCM), offers a cloud-based Data Processing platform that is paired with multiple secure manufacturing environments for printing and mailing critical documents. InfoSend's Data, Processing, Print and Mail (DPPM) solution allows clients to reach their customers with effective and timely communications across multiple channels.

InfoSend's DPPM solution accepts data streams from any system and includes all the tools necessary to submit, approve and track all details of the manufacturing and distribution process, including all aspects of USPS compliance, updates and tracking. The fully redundant data processing platform handles the hosting and distribution of the critical documents, allowing businesses to focus on innovating for their customers.

- Deep experience handling input data streams from a countless variety of systems across many industries.

- Customizable document composition with variable and ad hoc messaging options.

- Multi-channel distribution of documents: USPS, eBilling, Online Hosted Archive, API, FTP, Bank Networks and more.

- Online job tracking, customer service, sample approval and production service level agreement (SLA) detail.

- Print in black, grayscale, black plus one or more spot colors and full variable color.

- Industry-leading Quality Control (QC) process, leveraging the latest technologies to ensure error-free manufacturing.

- Full USPS compliance, postage savings and reporting, including return mail solutions.

- Dedicated support for production and distribution of marketing, informational inserts, postcard and special mailings.

- Partnered solutions: tracked delivery via FedEx, cash payments from retail locations via PayNearMe, Online Banking and more!

TAB 3 – Staffing and Resources.

Provide a detailed description of the resources available to ensure sufficient staffing levels, emphasizing your team's expertise, qualifications, and the ability to meet the service demands of this project. Demonstrate your organization's proven track record of competence and performance, including key personnel's qualifications and experience in similar projects. Highlight any resource management strategies that ensure continuity, efficiency, and the ability to scale resources as needed.

The following Organizational Chart provides an example of resources that will be available to the City of Clearwater. Beginning with a successful implementation to years of positive client/vendor relations, InfoSend has over 200 dedicated employees that are available to assist and provide support to the City.
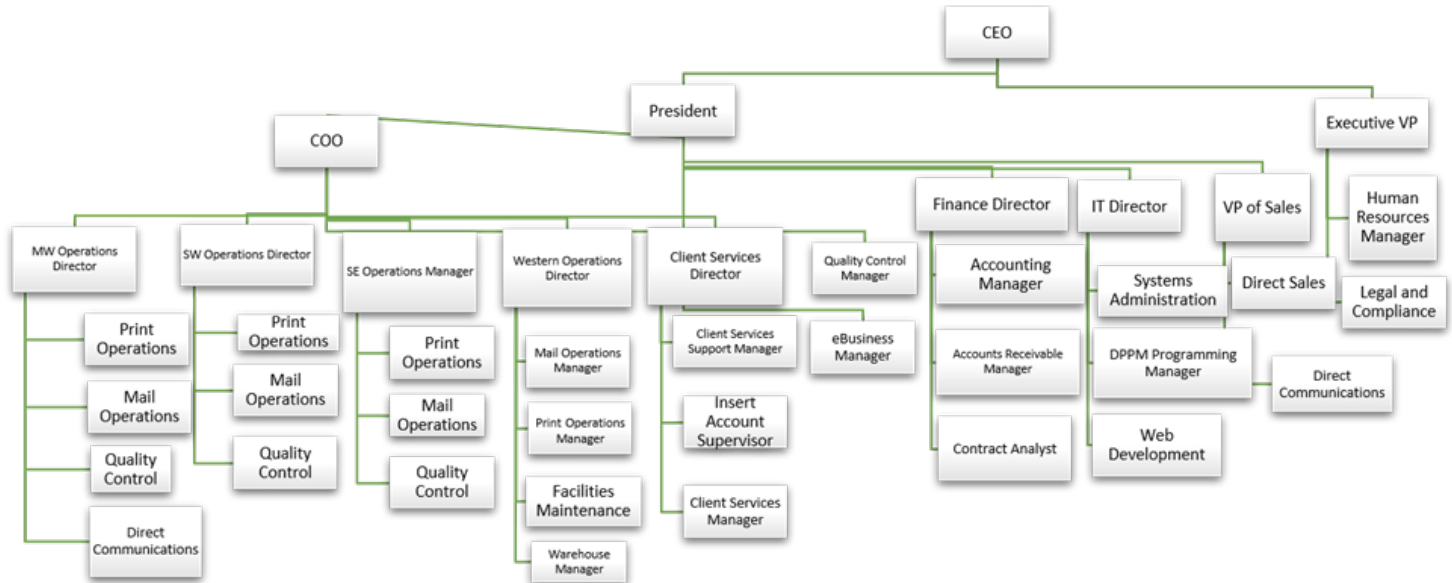
InfoSend prides itself with unparalleled client retention in our industry at 98.5%. While we are subject to market conditions, client business practices, and mandatory competition please note that **in our 29-year history, we have never lost a client due to a production, customer service, quality, or operational issues.** We are very proud of this accomplishment and work very hard to meet and exceed our client expectations.

Client satisfaction is achieved as mentioned above with a stellar customer service and support team. The outcome to Infosend is that clients provide extended terms, renewal options, and re-selecting InfoSend as the provider through the competitive bid processes. As our clients interact with InfoSend's client services and operations to provide solutions, often our clients will disclose "testimonials" of the support, process, and success in providing customer communications.

InfoSend Client Services Support

InfoSend's Client Services department provides web, phone and email support channels for clients, with dedicated support staff available to resolve client requests. Support staff is trained to monitor, analyze, escalate and respond to incoming requests, as well as provide proactive support in the event internal Quality Control procedures detect issues with client data.

InfoSend's mission to provide the industry-best support requires excellence and attention to detail within the Client Services (CS) department. InfoSend has designed support around extensive procedural controls to ensure client output is handled accurately and issues are addressed expeditiously. The following describes InfoSend's standard support coverage, the services that are included as part of annual software support, a listing of call priorities and an outline of escalation procedures.

InfoSend offers emergency an after-hours support line. An after-hours answering service is available 24/7/365. The answering service contacts InfoSend employees sequentially until one receives and acknowledges the call. Requests can be answered within 4 hours. InfoSend provides escalation phone number and contacts during the implementation. After-hours support may be billable. Please note, with the extensive support hours and support channels available, the after-hours answering service being used is extremely rare. Please see typical support channels overview below:

Support Channels and Availability
InfoSend provides the following methods to be reached to initiate a support request:

- 800 Toll-Free Telephone support: (800) 955-9330

- Email via support@infosend.com

- Free electronic access 24 x 7 at www.infosend.com with the following online benefits:

    o Log, track & close support requests

    o View & update support requests

    o Access published documentation

    o Access available downloads

    o Download reports

    o View Job Tracking statistics

    o Download sample files in PDF format

Standard hours of support are from 6:00 AM Pacific to 6:00 PM Pacific, Monday through Friday, excluding designated statutory holidays. Weekend assistance is available and must be scheduled in advance and in most cases is billable.

InfoSend recognizes the below holidays and will be closed should they fall on a weekday.

- New Year's Day

- Memorial Day

- Independence Day

- Labor Day

- Thanksgiving Day

- Christmas Day

Inbound Support Ticketing, Escalation, and Resolution Workflow
All issues or questions reported to support can be tracked via an online support ticket. Account Managers can provide support via telephone, email or the online support ticket tool that can be accessed by logging into www.infosend.com.

1. **Contact Dedicated Account Manager**: Each web submission, call or email is handled with personal

support. Clients receive support by contacting their dedicated Account Manager. If the client's dedicated contact is not available, the support request will be handled by another cross-trained Account Manager or Senior Account Manager. This representative will be your liaison through the support process, giving you a single point of contact for issue resolution.

2. **Request Logging:** Each support request can be logged using InfoSend's online Support Ticket Tool. Support Ticket requests are assigned a unique ID and can be viewed by both InfoSend Support and the client's authorized representatives. Support Ticket requests are archived and can be filtered by open and closed requests.

3. **Escalation Procedure:** InfoSend staff will internally escalate any required internal technical or operational resources to ensure that quality issues are resolved quickly and completely the first time. All necessary modifications are thoroughly tested before being applied to client applications to ensure that the final product meets quality expectations.

4. **Ticket Resolution:** Once an issue has been resolved, clients are notified of the solution and allowed to review new sets of samples to approve any changes. Extra attention is paid to the new job throughout our production, quality control and mailing process. When all parties confirm that the job is meeting quality expectations through every step in the process, we will approve and release the job for completion.

5. **Client Satisfaction**: Any concerns or questions around the support being provided may be escalated to the Client Services Director.

Proactive File Halt, Validation Error and Quality Control Support Procedures
InfoSend's data processing platform is designed to validate client data and will halt if any anomalies or incomplete data is detected. In addition, InfoSend's dedicated QC process will review all printed outputs to check for issues caused by client data. When issues are detected:

1. **Alert Notification:** InfoSend's internal system will automatically place the Job on hold, open a ticket and alert the CS department via an internal alert system, identifying the client and type of output.

2. **Assessment and Follow Up:** InfoSend's CS personnel will assess and then follow up with the relevant client contacts to notify of the issue.

3. **Resolution:** CS personnel will work with the client on how to address the data, either with a new data file or with programming adjustments.

File Cancellation and Document Pull Request Procedures
InfoSend's CS department accepts requests to cancel entire batches or pull select documents from a batch as a standard function of the department. This request can be placed through InfoSend's online website support ticketing system, via email, or by calling the 800 number. The request is then documented by the CS team and communicated to the InfoSend production departments through our internal systems.

1. **File Cancellation**: These requests are typically submitted to InfoSend just after file transfer but before printing. InfoSend's CS personnel will immediately change the status of the Job to prevent any further progression through the InfoSend manufacturing environment and remove the Job batch from the queue. Clients utilizing the Sample Approval workflow will have the option to cancel their own job, which will then be removed from the queue.

2. **Pull Document Requests:** These requests are typically submitted by the Client after the file is processed and prior to mailing. Ideally, these requests would be submitted to the CS team prior to the mail piece receiving the "Quality Control" timestamp in the website's client-facing job tracking system. Once the job has been marked as completing Quality Control, it will be moved into Mail Preparation. For this reason, Pull Document Requests made after the job has passed through QC should be communicated directly via phone call to ensure that they are handled immediately to minimize the chance that the piece is processed for mailing. The document to be pulled will then be intercepted after the document is printed. Pulled documents can either be recycled or returned to the Client.

TAB 4 – References.

Provide a minimum of three (3) references, preferably from public entities, for whom you have delivered similar services. For each reference, include the following details: Entity name, contact person's name, phone number, email address, mailing address, description of services, and service dates. The references should serve as testimonials to your company's ability to deliver the requested services efficiently and effectively.

Orange County Utilities, FL	(407) 254-9940
400 E South Street, Second Floor	David Boiani
Orlando, FL 32801	david.boiani@ocfl.net

- **Contracted Since**: 2021
- **Billing System**: Docucorp
- **Volume**: 125,000 Mail Pieces Monthly
- **InfoSend Products Used**: Data Processing Print and Mail,

Manatee County Utilities Department, FL	Ph - 941-792-8811 x5246 Fx - 941-745-3790
4410 66th Street West	Anthony Sinopoli - Business Systems Support Manager
Bradenton, FL 34210	anthony.sinopoli@mymanatee.org

- **Contracted Since**: 2019
- **Billing System**: Itineris (originally implemented with Banner CIS)
- **Volume**: Approximately 120,000 Mail Pieces Monthly
- **InfoSend Products Used**: Data Processing Print and Mail

City of Cape Coral, FL	239-574-7722 x4010
1015 Cultural Park Boulevard	Bill Boyd - Financial Services
Cape Coral, FL 33990	bboyd@capecoral.net

- **Contracted Since**: 2020
- **Billing System**: JD Edwards (Utility)
- **Volume**: Approximately 48,000 Mail Pieces Monthly
- **InfoSend Products Used**: Data Processing Print and Mail

Emerald Coast Utilities Authority, FL	(850) 969-5818
9255 Sturdevant St.	Justin Smith - Finance
Pensacola, FL 32514	justin.smith@ecua.fl.gov

- **Contracted Since**: 2021
- **Billing System**: SunGard
- **Volume**: Approximately 165,000 Mail Pieces Monthly
- **InfoSend Products Used**: Data Processing Print and Mail, Electronic Bill Presentment and Payment

TAB 5 – Proposed Schedule for Services.

Clearly outline the service solutions you are offering, along with a proposed schedule for daily, weekly, and monthly services. Include specific accuracy standards for each service and any internal performance targets. Additionally, describe any self-imposed penalties or corrective actions your organization will take if these standards are not met, ensuring that you are committed to delivering high-quality services consistently.

InfoSend Express PDF Project Plan

** InfoSend is the incumber vendor providing service to the City of Clearwater and the City has been utilizing InfoSend's services for several years. We are providing an example implementation timeframe since it was requested. Since City of Clearwater is already live an implementation will not be needed **

Based on previous experience with Clients of similar size and structure, the following timeline has been provided for project implementation. The implementation timeline begins once the contracting phase has been completed and InfoSend has received test files and mockups from the Client. Receipt of the test files and mockups will allow the Account Manager to begin the technical implementation.

This is only a sample 6-week timeline and assumes the Client input PDF is compatible with InfoSend standard print and envelope materials, with data properly embedded and compressed within the PDF. Should changes be needed to the Client input PDF, then the timeline will extend according to the scope of changes and client responsiveness to create print-ready PDFs.

Milestone: Requirements Gathering | Weeks 1-2	Responsibility
Kick-Off Meeting: Familiarize each party with the project managers assigned to the implementation	InfoSend and Client
Kick-Off Meeting: Client provides sample PDF exports	Client
Kick-Off Meeting: Discuss requested formatting changes to client PDF input	InfoSend and Client
Kick-Off Meeting: Fill out Standardized Client Installation Checklist	InfoSend
Kick-Off Meeting: Begin to discuss data processing details and data mapping in correlation to mockup	InfoSend and Client
Follow Up: Client adjusts PDF input as needed	InfoSend
Follow Up: Provide proofs for custom preprinted form and envelope (if applicable)	InfoSend
Finalize: Approve InfoSend document mockups	Client
Finalize: InfoSend will present the Client with a formal Statement of Work (SOW) which captures all requirements for the implementation project and production of outputs.	InfoSend
Finalize: Client reviews SOW and requests changes/clarification on any relevant items.	Client
Finalize: Client approves the SOW, Requirements Gathering complete	Client
Milestone: Application Build | Weeks 3-4	
Development: InfoSend Account Manager meets internally with the InfoSend programming team to execute application per the SOW	InfoSend
Development: Application Development Begins	InfoSend
Development: As needed, InfoSend Project Manager verifies additional requirements with	InfoSend and

Client	Client
Development: Internal Testing and Review of Applications is completed by Project Manager	InfoSend
Development: Internal Development Checklist reaches 100%	InfoSend
Go-Live Planning: Finalize Go-Live schedule, with relevant dates based on Client billing cycle schedule and staff availability for training	InfoSend and Client
Go-Live Planning: Production web application access provisioned	InfoSend
Milestone: User Acceptance Testing (UAT), Training, Go-Live Coordination | Week 5	
UAT: InfoSend provides first set of samples for review	InfoSend
UAT: Client reviews the output samples and provides feedback to your Account Manager about requested changes	Client
UAT: Begin payment/lockbox/other ancillary testing (if applicable)	InfoSend and Client
UAT Complete: Provide final approval on the outputs	Client
UAT Complete: Provide confirmation of payment/lockbox/other ancillary testing completed	Client
UAT Complete: Review Statement of Work (SOW) during weekly meeting and confirm all requirements met	InfoSend and Client
Training: Conduct training for Client staff on InfoSend systems and application management	InfoSend and Client
Go-Live Coordination: Begin parallel testing of application, including any automation scripts	InfoSend and Client
Go-Live Coordination: Complete parallel testing of application	InfoSend and Client
Go-Live Coordination: Internal Go-Live readiness checklist completed by Project Team and Management	InfoSend
Milestone: Go-Live | Week 6	
Go-Live: Receive and process first live file for distribution	InfoSend
Go-Live: Internal "First Live Run" Checklist completed, with review and signatures required from each department manager	InfoSend
Follow Up and Support: continue weekly meetings to cover additional questions or training until client satisfaction	InfoSend and Client

InfoSend Service Level Agreement

InfoSend's Customer Communications Management (CCM) platform, eBusiness applications and document manufacturing environments are designed with business continuity and reliability in mind. All client contracts are backed by Service Level Agreements (SLAs) to give clients the assurance that data processing, document production and distribution, and eBusiness applications will perform accurately and on time. During its entire history in business, InfoSend has never lost a client due to failure to deliver on an SLA.

A sample SLA is provided below, however, InfoSend routinely collaborates with clients on an SLA that suits the dynamics of their particular data, documents or eBusiness applications.

Sample SLA:

InfoSend agrees to the following Service Level Agreement ("SLA") with penalties for non-compliance during delivery of InfoSend services detailed in this agreement. The SLA applies even in the case of a routine natural disaster (such as an earthquake or fire) or other issues that necessitate the transfer of the Service to a disaster recovery facility. SLA penalties do not apply if errors or delays are caused by Client or if there is a serious issue such as an act of war or region-wide calamity that no company could prevent against using commercially available disaster preparedness techniques. InfoSend and Client agree on the following SLA:

- InfoSend hosted web applications will maintain a 99.99% uptime.

- Documents will be produced and distributed exactly as displayed in the Client-approved sample file.

- Documents will be printed on the correct forms and inserted into the correct envelopes.

- The documents will be printed and mailed the next business day.

- Completed job batch reports will be provided within 24 hours.

- Documents will be emailed upon batch completion to client's customers enrolled in an InfoSend eBusiness application.

- Payments made by client's customers within an InfoSend eBusiness application will be reported on an agreed upon schedule.

- Planned system maintenance will be communicated by InfoSend in advance.

If the above SLA is not met, a 10% Service Fee penalty will be provided for each business day that a batch of documents is delayed. The penalty would apply to InfoSend's Service Fees only and not to postage or materials (printed stock, envelope stock, etc.). If the data is not output as displayed in the Client-approved sample file, a 50% Service Fee credit will be provided if the issue did not impact all documents in the batch or did not impact the ability for customers to understand the documents and remit payments. If the issue affected all documents in the batch or impacted the ability for the customer to understand the document, a 100% Service Fee credit will be applied (e.g. inaccurate data was printed due to an InfoSend data processing error).

TAB 6 – Reporting, Quality Control, and Accountability Plans.

Provide detailed information about your business practices, procedures, and policies, covering the following areas:

• Reporting: Outline how you will track and communicate service performance, including frequency and format of reports.

Data Processing, Print and Mail Reporting

InfoSend's Customer Communications Management (CCM) platform provides clients with the necessary reports to reconcile and receive updates throughout the Data Processing, Print and Mail (DPPM) process. InfoSend standard reporting workflow is provided by default, and is able to provide certain reports in a variety of methods including text files, comma delimited files, HTML formatted reports and in some cases, PDFs.

All reports are available either through the InfoSend website and can also be emailed or transmitted via secure FTP. In addition, clients have the capability of assigning internal contacts that have permissions to access/receive reports.

File Transfer Acknowledgement Report
Upon client upload of a data file for processing, InfoSend will send the File Transfer Acknowledgement Report as certification of receipt of the file. The File Transfer Acknowledgement Report provides information about the file name, byte size, page/record count and file receipt date. This report is posted to InfoSend's secure web portal for viewing and is also commonly emailed to designated client staff members.

```
○ ○ ○                 📄 Client File Transfer Acknowledgement
FROM : INFOSEND, INC.
DATE : 03/19/2014
RE   : FILE TRANSFER ACKNOWLEDGEMENT
========================================================================

    THIS FILE CONFIRMS THAT THE FILE(S) LISTED BELOW HAVE BEEN
    RECEIVED. IF YOU FIND ANY DISCREPANCY OR IF YOU HAVE ANY
    QUESTIONS OR SPECIAL INSTRUCTIONS REGARDING THIS LIST,
    KINDLY GIVE US A CALL AT (714) 993.2690 OR TOLL-FREE (800) 955.9330.

    THANK YOU.


------------------------------------------------------------------------
NO.   NAME OF FILE(S)        FILE SIZE    PAGE/RECORD        DATE
                              (BYTES)        COUNT         RECEIVED
------------------------------------------------------------------------

 1.   INF.0319.STMT.TXT        973959         2441    03/19/2014 11:28:01 AM
========================================================================
               TOTAL PAGES/RECORDS: 2441
```

Process Summary Report
The Process Summary Report is a detailed PDF document that summarizes key data points contained within a document run batch. If a client chooses to review sample files prior to printing, the Process Summary Report will be included as a cover page within each set of samples. It is also posted to InfoSend's "Reports" tab of the web portal in PDF form. The Process Summary Report details important information such as data files that were included within the job, document details such as page count and batch amount if documents are bills, print output information, suppressions, inserts included, and USPS presort counts and estimated postage.

Process Summary Report
Job Code: INF0929A
Report Generated 10:04am September 29, 2013

Data Files

Filename	File Received
INFOSEND_BILLINGDATA_20130929A.TXT	2013-09-29 09:25am
INFOSEND_CYCLEDATA_20130929A.TXT	2013-09-29 09:25am

Document Input

Accounts	First Pages	Total Pages	Batch Amount
12,000	12,000	18,000	$900,000.00

Print Output

Accounts	First Pages	Total Pages	Amount	Mailpieces	Non-Barcoded Mailpieces	Householded Mailpieces	NCOA Updates
11,000	10,000	14,000	$800,000.00	10,005	77	95	38

Suppressions

Accounts	First Pages	Total Pages	Amount	Name
250	250	250	$25,000	Undeliverable Address
250	250	250	$25,000	Client Suppression Rule(s)
250	250	250	$25,000	eBilling Paperless Suppression
250	250	250	$25,000	InfoSend Exception Processing

Inserts

Name	Count
N3896 - Online Payment Options	5,460
N3904 - Fall Water Conservation	10,000

Postage Summary

Name	Count	Amount
Presorted Mailpieces	9,000	$3690.00
Non-Presorted Mailpieces	500	$220.00
Non-Barcoded Mailpieces	350	$154.00
Extra Postage (Non-Standard Mailpiece)	150	$112.50

Process Confirmation Report

The Process Confirmation Report is emailed to designated client staff members as well as posted to the reports section of the web portal after documents have been completed for mailing and released to the USPS. This report provides confirmation that InfoSend has released a job's mail pieces to the USPS for mailing. The Process Confirmation Report can be created in one of three different formats: plain text, XML or HTML.

This report provides the name of the file(s) mailed along with a detailed mail count. For statements, invoices and other financial documents, the total dollar amount is also provided. Additional information can be provided after the "totals" section of the report. For example, addresses that could not be verified for delivery point validation can be listed at the end of this report.

Job Tracking Tool

The Job Tracker provides the current status of jobs as it progresses through InfoSend's data processing and print production departments. The Job Tracking tool contains details such as job type, number of component files that are contained within the job, file receipt timestamps, sample files that may be downloaded and the status of printing/quality control/mail preparation. Once a file has been completed for mailing and mail pieces have been released to the USPS a timestamp of file completion confirmation will be provided. InfoSend provides a history of the past 100 jobs that were processed through the system.

Address Update Report

Address Updates including NCOALink hits or ACS updates are provided in InfoSend's reporting section. The ACS/NCOALink report is available in three formats: plain text comma delimited, XML or HTML. Most address update reports are either comma delimited or XML formatted so that InfoSend's clients can automate the process of loading updates into their customer information system.

• Quality Control: Describe your quality assurance processes and mechanisms to ensure the delivery of services meets established standards.

InfoSend Quality Control

InfoSend has been in business since 1996, with the founders starting the business with the assertion that comprehensive process controls, quality and customer service can make a difference to organizations sending critical documents. Anyone can process and output a document using standard technology, but to do it well and defect-free requires well-designed technology and controls. InfoSend's strength is in its well-designed tools, procedure, people and culture that demand high volume output with over **99.99966% accuracy**.

InfoSend's document output platform and manufacturing operations have been designed using Six Sigma guidelines for engineering the solution and service. InfoSend strives to achieve stable and predictable results while continually sustaining quality improvements across the entire organization. InfoSend seeks continuous improvement of the business process using the **DMAIC** methodology:

D - Define a problem or improvement opportunity.
M - Measure process performance.
A - Analyze the process to determine the root causes of poor performance; determine whether the process can be improved or should be redesigned.

I - Improve the process by attacking root causes.
C - Control the improved process to hold the gains.

Whenever defects which are not detected and remedied as part of standard procedure, the issue is logged and escalated to a **Quality Assurance Team** which will perform **Root Cause Analysis (RCA)**, perform remediation and present a report to Executive Management.

Quality Control for Data Processing, Print, and Mail

InfoSend's Quality Control for Data Processing, Print and Mail are designed according to the following workflow, ensuring checks and balances throughout the process to eliminate the cause of defects in client output:

1. **Client Data Transfer, Format Integrity and Job Code Assignment**
2. **Document Composition, Address Integrity and Sequencing**
3. **Print Operator Checks**
4. **Data/Print Quality Control & Staging**
5. **Manual Fulfillment**
6. **Bulk Mail Insertion and Checks**
7. **Daily SLA Checks**

Automated 2D Barcode Accuracy System

InfoSend leverages an automated 2D barcode system, which ensures manufacturing accuracy of client output. Key Components include:

2D Barcode Scanner

2D Barcode System Monitor

Printing
Each document is printed with a unique 2D barcode on the address block, and this barcode is stored in the InfoSend database.

Scanning
A scanner checks every document as they are inserted on InfoSend inserting equipment. The envelope window is scanned and the documents are reconciled in real time with the original document print stream database, ensuring each mail pieces is accounted for.

Reconciling
The 2D barcode monitor provides real-time alerts for any out-of-sequence, missing, duplicate, misread or invalid document discrepancies during production. If a document is missing or jammed, it will be reproduced. The

machine operator must signal a supervisor every single time there is an out of sequence error and receive sign-off on the resolution. InfoSend will not mail any batches which have unresolved errors (e.g., missing mail pieces).

• Accountability: Explain the measures in place to ensure accountability for service delivery, including how performance will be monitored and managed.

InfoSend Service Level Agreement

InfoSend's Customer Communications Management (CCM) platform, eBusiness applications and document manufacturing environments are designed with business continuity and reliability in mind. All client contracts are backed by Service Level Agreements (SLAs) to give clients the assurance that data processing, document production and distribution, and eBusiness applications will perform accurately and on time. During its entire history in business, InfoSend has never lost a client due to failure to deliver on an SLA.

A sample SLA is provided below, however, InfoSend routinely collaborates with clients on an SLA that suits the dynamics of their particular data, documents or eBusiness applications.

Sample SLA:
InfoSend agrees to the following Service Level Agreement ("SLA") with penalties for non-compliance during delivery of InfoSend services detailed in this agreement. The SLA applies even in the case of a routine natural disaster (such as an earthquake or fire) or other issues that necessitate the transfer of the Service to a disaster recovery facility. SLA penalties do not apply if errors or delays are caused by Client or if there is a serious issue such as an act of war or region-wide calamity that no company could prevent against using commercially available disaster preparedness techniques. InfoSend and Client agree on the following SLA:

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- Documents will be produced and distributed exactly as displayed in the Client-approved sample file.

- Documents will be printed on the correct forms and inserted into the correct envelopes.

- The documents will be printed and mailed the next business day.

- Completed job batch reports will be provided within 24 hours.

- Documents will be emailed upon batch completion to client's customers enrolled in an InfoSend eBusiness application.

- Payments made by client's customers within an InfoSend eBusiness application will be reported on an agreed upon schedule.

- Planned system maintenance will be communicated by InfoSend in advance.

If the above SLA is not met, a 10% Service Fee penalty will be provided for each business day that a batch of documents is delayed. The penalty would apply to InfoSend's Service Fees only and not to postage or materials (printed stock, envelope stock, etc.). If the data is not output as displayed in the Client-approved sample file, a 50% Service Fee credit will be provided if the issue did not impact all documents in the batch or did not impact the ability for customers to understand the documents and remit payments. If the issue affected all documents in the batch or impacted the ability for the customer to understand the document, a 100% Service Fee credit will be applied (e.g., inaccurate data was printed due to an InfoSend data processing error).

InfoSend Regulatory Compliance

InfoSend serves clients by providing the distribution of customer correspondence via mail, Web, and other channels. Physical infrastructure, data and computing environment security and safety are of great importance. InfoSend's systems, security processes, and practices are currently subject to the rules and regulations of multiple laws and audit types:

Payment Card Industry Data Security Standard (PCI DSS) - InfoSend holds a PCI DSS Certificate of Compliance and undergoes an annual on-site audit by a third party auditor.
Health Insurance Portability and Accountability Act (HIPAA) - InfoSend is defined as a Business Associate and is compliant with the associated rules and regulations.
SSAE18 Auditing with SOC 1 & 2 Reporting - InfoSend's organization and systems are audited on an annual basis by an AICPA certified firm to produce SOC reports.
Gramm-Leach-Bliley Act (GLBA) - InfoSend is compliant with the associated rules and regulations that apply to providing services to clients covered by GLBA.
Fair and Accurate Credit Transactions Act of 2003 (FACTA) - InfoSend is compliant with the "Red Flags Rules" that clients covered by FACTA must follow. This includes maintaining an Identity Theft Prevention Program (ITPP).

• Security: Detail the security protocols and safeguards your organization implements to protect sensitive information and ensure compliance with relevant regulations.

Incident Response Plan

InfoSend's Incident Response Plan is a component of our Information Security Policy, which is confidential and proprietary. InfoSend will provide our detailed Incident Response Plan upon execution of a non-disclosure agreement.

InfoSend has a Computer Incident Response Team (CIRT) comprised of both management and information security employees responsible for implementation of our Incident Response Plan in response to cyber-attacks that includes the following components:

• Detection
• Confinement
• Establishment of Emergency Business Continuity Plan
• Analysis of Intrusion/Forensic Investigation
• Post Forensic Recovery from the Intrusion
• Ensure Proper Security of the System & Network
• Restore Affected Services
• Implement Mandated Reporting
• Update Security Policy to Reflect Lessons Learned

InfoSend's non-confidential Security Procedures are provided below.

InfoSend Security Procedures

InfoSend's Customer Communications Management (CCM) platform is responsible for processing and distributing consumer communications. As such, physical infrastructure, data and computing environment security and safety are paramount to protecting consumer information on behalf of clients. InfoSend's systems, security processes, and practices are currently subject to the rules and regulations of multiple laws and/or audit types:

- Payment Card Industry Data Security Standard **(PCI DSS)**

- Health Insurance Portability and Accountability Act **(HIPAA)**

- Statement on Standards for Attestation Engagements **(SSAE 18)**

- Gramm-Leach-Bliley Act **(GLBA)**

- Fair and Accurate Credit Transactions Act of 2003 **(FACTA)**

InfoSend approaches the risk of data breach via the following methodologies:

1. **All Facility Physical Premises Secured:** All InfoSend facilities are locked and protected at all times, with access requiring security authorization by InfoSend. InfoSend employees have issued I.D. cards that must be worn at all times. Guests are strictly monitored and chaperoned.

2. **Secure Encrypted Data Transfer and Storage Practices:** All data files can be PGP encrypted during transfer, and all web traffic utilizes HTTPS, ensuring secure communications both ways. Data is stored with both encryptions at rest and extensive compensating controls.

3. **Secure Segmentation and Disposal of Client Data:** Data is segmented between each InfoSend customer to ensure no commingling or erroneous joining can occur. All programs and workflows are custom-tailored to the client, ensuring program failure and employee notification in the event data is somehow manually entered into a workflow.

4. **Secure Disposal of Client Data:** All client data, whether digital or printed is disposed of securely with degaussing and shredding required.

5. **Firewalls and Web Application Security:** InfoSend limits traffic to and from each facility to business essentials, and employs numerous technologies to detect and thwart intrusion attempts. InfoSend regularly undergoes penetration tests with outside vendors.

6. **Background Checks and Drug Tests for All New Employees**: All InfoSend employee identities are verified and checked for criminal history before acceptance. In addition, employees are administered and must pass a drug test before hiring.

7. **Annual Security Policy and Awareness Training for Employees:** All InfoSend employees are given training on security procedures and risks at least annually, ensuring awareness and compliance.

8. **Formal Suspected Breach Escalation, Review and Notification Process**: All employees are trained to report and escalate suspected breaches or breach attempts to their manager immediately. If client data was at risk, and the breach is not ruled out after a second internal review, then the client is notified and InfoSend pledges full cooperation during the further investigation.

Physical Security Details

InfoSend facilities employ physical site security measures such as zoned and controlled access, cameras, alarms and other theft deterrents. In addition, InfoSend ensures that only approved personnel handle client information and materials. Buildings are locked at all times with approved personnel access controlled by key cards. All visitors are required to sign a visitor log, wear a visitor badge and will be escorted while in the building. Additionally, InfoSend maintains a West Coast Headquarters and a Midwest facility for business continuity, as well as to support the growing needs of our customers. These production facilities are located in Anaheim, CA, Downers Grove, IL, Fort Worth, TX and Fort Myers, FL. Each facility operates with mirrored processes and compatible equipment. InfoSend has a tested disaster recovery plan and a secure off-site data center.

Systems Hardening

InfoSend performs the following systems hardening functions:

- System-wide security policies protect data from internal and external threats
- New users must change system-generated passwords upon the first login
- Real-time HTTP and HTTPS application layer security inspection
- Require special characters and minimum length security passwords
- Require password changes every 3 months
- Vendor-supplied default or guest accounts are protected or deleted
- Start-up passwords must be created in a manner that is not predictable
- Anti-virus definitions are updated automatically as they become available to protect client data from viruses, Trojan horses, worms, etc.
- Anti-virus software is installed on each Windows PC, and on the corporate mail server

- Process hardening through use of SELinux

- Live log analysis and file integrity scanning

- Install and maintain the most recent service packs

- Monitor security rollout packages, install patches as needed

- Remove unnecessary applications

- Remove unnecessary services and default settings

- Monitor security rollout packages, install patches as needed

Continuous Improvement

In an effort to continue core operations and provide the excellent support our clients rely on, InfoSend understands the importance of continued improvement of our security practices. Security is at the forefront of this improvement process. Through our extensive research and proactive measures, InfoSend clients can be assured that their data is protected and handled with the highest industry-standard measures of care.

TAB 7 – Cost of Services.

Provide a comprehensive and detailed breakdown of the pricing for the proposed services (Part 1 and/or Part 2). Ensure that all costs are clearly itemized, as no additional fees will be considered or negotiated once the contract is finalized. Include any variables or conditions that may impact pricing and provide a transparent view of all associated costs for the services offered.

Client Volume Assumptions
Customers Contacted or Billed Monthly -Approximately 63,000 utility bills per month -Approximately 7,800 past due reminder bills per month -Approximately 150 past due final bills per month -Approximately 13,000 direct debit notices per month -Approximately 100 final debit bills per month -Note: Actual physical printed volume is approximately 37,500 per month based on January production -The estimated monthly volume of return envelopes is 32,483 per month **Number of Batches Monthly** -Data is submitted 5 days per week – Monday thru Friday – with 3,000 to 5,000 printed daily

InfoSend Data Processing, Print and Mail Pricing

Document Production Summary	
Utility Bill or Notice – Custom Envelopes as requested – fixed for 3 years Package includes: one printed page up to 2/2 ink, InfoSend outgoing #10 envelope, InfoSend #9 return envelope	**$0.1255 per document**
Utility Bill or Notice – Standard Envelopes as recommended – fixed for 3 years Package includes: one printed page up to 2/2 ink, InfoSend outgoing #10 envelope, InfoSend #9 return envelope	**$0.1095 per document**
Same Day SLA surcharge To mail same day if files are received by 9:30AM and approved by 10:30AM EST	**$0.0035 per document**

Option 1 – Finished mail pieces are delivered to the USPS **within one (1) business day.** If electronic PDF samples (proofs) are requested then the mailing will be completed within one day of sample approval. File upload deadline for next-day mailing is 1:30PM local time at the production facility designated for your account. If samples are required then they must be approved by 3:30PM local time for the file to be mailed by the next business day.

Option 2 – Finished mail pieces are delivered to the USPS **on the same day.** If electronic PDF samples (proofs) are requested then the mailing will be completed on the same day of sample approval. File upload deadline for same-day mailing is 9:30AM local time at the production facility designated for your account. If samples are required then they must be approved by 10:30AM local time for the file to be mailed on the same business day.

The below provides the components of the summary price given above. All pricing is based on "Client Volume Assumptions" listed below and excludes applicable sales tax. Approved custom envelope orders will be billed up front and not on a per use basis.

Data Processing	
Setup Fee - Express PDF Input Files	$0.00 – Waived for Existing Client
Setup Fee – Data Only Input Files	$0.00 – Waived for Existing Client
Document Re-Design Fee	$150.00
Data Processing Fee (per document)	**$0.0075**

Printing and Mailing Service	
Utility Bill Printing & Mailing Fee per Page with up to 2/2 Ink	$0.0439
USPS Postage	**Pass-through** A postage deposit will be required prior to starting service.

Print Color Options (colors per side) *	$0.0439 for 2/0, 2/1 or 2/2 printing $0.0441 for 4/0 or 4/1 printing $0.0444 for 4/4 printing
Batch Fee (per mailing batch under 200 mail pieces)	$5.00
Excess Pages Handwork Surcharge (per mail piece)	$0.3237
Address Updates – per "hit" (address that gets updated)	$0.30 NCOA $0.30 ACS

*Prices assume normal ink/toner coverage for business documents. Flood coating the entire page in color or other types of extremely high coverage designs may cost more or not be technically feasible. Extremely high coverage designs can cause content to bleed through to the other side of the page or to cause the page to curl too much to work properly with high-speed mail inserting equipment.

Materials

Standard 8.5" x 11" Paper Stock (per sheet)	**$0.0151**
Standard Double Window Outgoing #10 Envelope – recommended	**$0.023**
Standard Single Window Return #9 Envelope – recommended	**$0.020**
Outgoing Flat Envelope – used for mail pieces with excess pages	$0.1727
Custom #10 Outgoing Envelope – requested by City	$0.0287
Custom #9 Return Envelope – requested by City	$0.0241

Insert Services

InfoSend Produced	Quoted based on specification
Envelope Messaging (Snipes)	Quoted based on specification
Electronic Inserts	$0.008
Inserting Fee Fee to insert an InfoSend produced or Client provided marketing or informational insert. Client provided (drop-shipped) inserts must be professionally packaged and ready for usage. If folding is required then additional fees apply based on folding requirements. Minimum fee is $0.01 per insert for folding. If inserts are not professionally packaged and damaged in shipment or require additional labor to prepare for inserting then additional fees can apply. Per item fee assumes the insert will be included in all mail pieces. Selective inserting is available but requirements must be reviewed on a case by case basis to determine if additional fees will apply for setup and handling.	$0.008 per insert

Optional Document Services

Print Image Archiving (Per Document Image), with included USPS mail tracking	$0.01 - For 12 Months of Retention $0.022 - For 24 Months of Retention $0.027 - For 36 Months of Retention
Print Image Archive API Monthly Support Fee	$100.00
Final Doc Transfer (FDT)	Option 1: $0.009 per document. One PDF will be provided per batch with multiple documents in it. InfoSend standard batch file format provides account and page numbers for each record in the batch. Option 2: $0.015 per document. Each document will be provided in a separate PDF file. A custom batch file format can be provided if the InfoSend standard format will not work.
Professional Services Rate (per hour)	$150.00
Returned Mail Handling	$0.35 per reported returned mail piece
Remit Tracking	$100 monthly support fee

Fee Explanations

Data Processing
- **Setup Fee - Express PDF Input:** requires a final composed PDF is uploaded to InfoSend for processing. Clients maintain control of document look and feel, but InfoSend designs a program to parse the necessary data from the PDF.
- **Setup Fee - Data Only Input:** requires the client provide a flat data extract, InfoSend creates, hosts and maintains an application to generate documents. Existing document design is copied.
- **Document Re-Design Fee:** using the "Data Only Input" method, InfoSend's Client Services Team assists in redesigning the format of printed documents to improve communications or to take advantage of new printing capabilities.
- **Data Processing Fee:** per document image that is processed by the InfoSend system for output.

Printing and Mailing Service
- **Print Fee:** price includes baseline number of colors printed on the front and back of the document. All variable and static images are dynamically imaged onto white form with a perforation.
- **Postage:** clients are invoiced for the exact postage used. Leveraging InfoSend's USPS compliance and expertise, clients are provided the lowest possible USPS automated rates when client batches qualify.
- **Optional Color Upgrades:** Different options are available at different prices. Numbers fewer than 4 equal individual colors, 4 equals full color. The number 1 means black or grey. All sheets are billed at the same rate; the price for the sheet with the highest number of colors is the applicable fee. **4 equals CMYK (full color).**
- **Batch Fee:** assessed to cover InfoSend costs when batches transferred to InfoSend fall below threshold.
- **Inline Insert Print Fee:** price for inserts printed on demand as additional pages. Allows for more dynamic customer messaging without the extra pre-production lead time and overhead.
- **Excess Pages Handwork Surcharge:** surcharge is assessed per mail piece (not per page). This surcharge only applies to multiple page bills that have too many pages to be inserted into a #10 envelope by machine. This surcharge covers the necessary manual labor required to process these mail pieces.
- **Address Updates – NCOALink or ACS:** per reported update. InfoSend electronically reports the addresses it received in your data that need to be updated because the customer filed a Change of Address Report with the USPS. Cost is per update.

Materials
- **Paper Stock:** white paper stock with or without perforation. Paper is 8.5x11" and 24lb. Price includes all inventory costs. A larger 8.5x14" format is available at a higher material cost and higher printing cost.
- **Outgoing #10 Envelope:** #10 InfoSend Standard Double Window Outgoing Envelope. Includes security tint printed on the inside of the paper stock and clear film that prevent the contents of the envelope from being viewed. Sourced with sustainably logged paper (SFI).
- **Return #9 Envelope:** #9 InfoSend Standard Single Window Return Envelope. Includes the same security tint and SFI paper as the #10.
- **Outgoing Flat Envelope:** single window envelope, only used for multiple page statements that do not fit in the #10 envelope.

Insert Services
- **InfoSend Produced Inserts:** utilizing InfoSend printing and/or design services, inserts can be produced by InfoSend. Price quoted on request.
- **Envelope Messaging (Snipes):** custom messages and images can be printed onto the standard InfoSend #10 double window envelope as a more cost-effective alternative to pre-manufactured custom envelopes. The price depends on the artwork – number of colors and whether it prints on one or both sides of the envelope, as well as order quantity. Price is quoted upon request.
- **Electronic Inserts:** fee per digital image of a physically produced insert included in the PDF copy of a document. Ensures that client representatives and client customers can get the same information in the electronic bill as would go out physically.
- **Inserting Fee:** client provided or InfoSend produced inserts to be included with InfoSend produced mail. Additional fee applies if insert arrives at InfoSend but requires folding prior to insertion. Setup fees may apply for programming selective inserting. InfoSend-printed inserts are quoted upon request.

Optional Document Services
- **Enhanced Print Quality:** the baseline print image quality for transactional documents such as statements and invoices is 600 x 600 DPI. Work produced from InfoSend's Anaheim facility can be printed at an enhanced image quality at an additional cost. This option uses high definition pigment ink & variable drop sizes to achieve a perceived 1200 x 1200 DPI image quality.
- **Print Image Archiving:** fee per document to process, index, and store a document as a PDF for a set number of months. PDFs are securely accessed using an InfoSend website application, and includes USPS mail tracking for all outbound First Class mailed documents. Setup fees may apply depending on configuration needs.
- **Print Image Archive API Monthly Support Fee:** a flat monthly support fee to provide API access to documents in the InfoSend Print Image Archive. InfoSend will work with the designated third parties that a Client chooses, and provide support and open access to API calls on a monthly basis.
- **Final Doc Transfer FTP:** each completed InfoSend batch is indexed and transferred to you via FTP or SFTP to store on your own network. InfoSend's standard Batch File format is one PDF per batch with an XML companion file providing meta data and page numbers. If the client requires a custom scheme, including individual PDFs per each image in a batch, the Custom fee applies. Note: setup fees may also apply for some custom setups.
- **Professional Services Fee:** per hour and performed only upon request for customizations made to processing program or document format after go-live. Work is only started after receiving client approval of a formal quote.
- **Returned Mail Handling:** InfoSend will provide electronic reporting of mail that is returned by USPS, saving clients the hassle of receiving and opening returned mail to update records. All records which are not delivered will be securely destroyed and recycled after reporting.
- **Remit Tracking:** for clients utilizing the Print Image Archiving service, InfoSend can also track inbound mail from customers utilizing an included remittance stub in the outbound mail. With Remit Tracking clients will be able to see when a customer responded to the original mail piece, as well as get a daily report of inbound mail with an estimated value of payment remittances based on the outbound mail.

Other Forms. - Reference Submittal Requirements.

SUBMITTAL REQUIREMENTS

1   Exceptions*

Proposers shall indicate any and all exceptions taken to the provisions or specifications in this solicitation document. Exceptions that surface elsewhere and that do not also appear under this section shall be considered invalid and void and of no contractual significance.

Do you have any exceptions to the provisions or specifications?

☐ Yes

☒ No

*Response required

When equals "Yes"

*Exceptions Taken**

****Special Note – Any material exceptions taken to the City's Terms and Conditions may render a Proposal non-responsive.**

Upload a copy of any exceptions taken to the provisions or specifications in this solicitation.

*Response required

2   Additional Materials*

Have you included any additional materials?

☒ Yes

☐ No

*Response required

When equals "Yes"

*Description of Additional Materials**

Provide a brief description of the additional materials included.

InfoSend has included samples of billing statements that it has designed for municipal utility clients nationwide. The examples show how InfoSend designs user friendly billing statements for our clients while maintaining and even complimenting the overall image each of our clients wants to convey to their customers. They utilize the advantages of full color variable digital printing to make analytical data easy to read and understand through the use of charts, graphs and tables all printed in color. Using this technology also provides an extra degree of flexibility as there is no pre-printed stock in storage for use when monthly cycles dictate. Instead, the entire composition of each statement – logos, artwork format and variable billing data are all printed from a clean sheet of paper and accounted for at the same time by the digital printing process. Changes can be made to the statement's composition at any time and there is never any danger of forms obsolescence as they only exist digitally until the print process takes place.

3 Certified Business*

Are you a Certified Small Business or a Certified Minority, Woman or Disadvantaged Business Enterprise?

☐ Yes
☒ No

*Response required

When equals "Yes"
Certified Business Type*
Pick one of the following.

☐ Certified Small Business
☐ Certified Minority, Woman, or Disadvantaged Business Enterprise
*Response required

When equals "Yes"
Certifying Agency*
List the Agency that provided your certification.

*Response required

When equals "Yes"
Certification Documentation*
Provide a copy of your certification.

*Response required

4   Vendor Certification*
By submitting this response, the Vendor hereby certifies that:

A. It is under no legal prohibition on contracting with the City of Clearwater.

B. It has read, understands, and is in compliance with the specifications, terms and conditions stated herein, as well as its attachments, and any referenced documents.

C. It has no known, undisclosed conflicts of interest.

D. The prices offered were independently developed without consultation or collusion with any of the other vendors or potential vendors or any other anti-competitive practices.

E. No offer of gifts, payments or other consideration were made to any City employee, officer, elected official, or consultant who has or may have had a role in the procurement process for the commodities or services covered by this contract. The Vendor has not influenced or attempted to influence any City employee, officer, elected official, or consultant in connection with the award of this contract.

F. It understands the City may copy all parts of this response, including without limitation any documents or materials copyrighted by the Vendor, for internal use in evaluating respondent's offer, or in response to a public records request under Florida's public records law (F.S. Chapter 119) or other applicable law, subpoena, or other judicial process; provided that the City agrees not to change or delete any copyright or proprietary notices.

G. It hereby warrants to the City that the Vendor and its subcontractors will comply with, and are contractually obligated to comply with, all federal, state, and local laws, rules, regulations, and executive orders.

H. It certifies that Vendor is not presently debarred, suspended, proposed for debarment, declared ineligible, voluntarily excluded, or disqualified from participation in this matter from any federal, state, or local agency.

I. It will provide the commodities or services specified in compliance with all federal, state, and local laws, rules, regulations, and executive orders if awarded by the City.

J. It is current in all obligations due to the City.

K. It will accept all terms and conditions as set forth in this solicitation if awarded by the City.

L. The signatory is an officer or duly authorized representative of the Vendor with full power and authority to submit binding offers and enter into contracts for the commodities or services as specified herein.

☒ Please confirm

*Response required

5 E-Verify System Certification*
PER FLORIDA STATUTE 448.095, CONTRACTORS AND SUBCONTRACTORS MUST REGISTER WITH AND USE THE E-VERIFY SYSTEM TO VERIFY THE WORK AUTHORIZATION STATUS OF ALL NEWLY HIRED EMPLOYEES.

The affiant, by virtue of confirming below, certifies that:

A. The Contractor and its Subcontractors are aware of the requirements of Florida Statute 448.095.

B. The Contractor and its Subcontractors are registered with and using the E-Verify system to verify the work authorization status of newly hired employees.

C. The Contractor will not enter into a contract with any Subcontractor unless each party to the contract registers with and uses the E-Verify system.

D. The Subcontractor will provide the Contractor with an affidavit stating that the Subcontractor does not employ, contract with, or subcontract with unauthorized alien.

E. The Contractor must maintain a copy of such affidavit.

F. The City may terminate this Contract on the good faith belief that the Contractor or its Subcontractors knowingly violated Florida Statutes 448.09(1) or 448.095(2)(c).

G. If this Contract is terminated pursuant to Florida Statute 448.095(2)(c), the Contractor may not be awarded a public contract for at least 1 year after the date on which this Contract was terminated.

H. The Contractor is liable for any additional cost incurred by the City as a result of the termination of this Contract.

☒ Please confirm

*Response required

SCRUTINIZED COMPANIES FORMS

SCRUTINIZED COMPANIES AND BUSINESS OPERATIONS WITH CUBA AND SYRIA CERTIFICATION FORM
IF YOUR BID/PROPOSAL IS $1,000,000 OR MORE, THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL. FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

1.   The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or engaging in business operations in Cuba and Syria; and

2.   The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria; and

3.   Business Operations means, for purposes specifically related to Cuba or Syria, engaging in commerce in any form in Cuba or Syria, including, but not limited to, acquiring, developing, maintaining, owning, selling, possessing, leasing or operating equipment, facilities, personnel, products, services, personal property, real property, military equipment, or any other apparatus of business or commerce; and

4.   If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria.

_____
Authorized Signature

Russ Rezai
_____
Printed Name

President
_____
Title

InfoSend, Inc.
_____
Name of Entity/Corporation

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization on, this _____ day of _____, 20____, by _____ (name of person whose signature is being notarized) as the _____ (title) of _____ (name of corporation/entity), personally known _____, or produced _____ (type of identification) as identification, and who did/did not take an oath.

_____
Notary Public

_____
Printed Name

My Commission Expires: _____
NOTARY SEAL ABOVE

See Attached

ACKNOWLEDGMENT

> A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California
County of _____Orange_____)

On ___February 13, 2025___ before me, ___Sharon Elizabeth Rodas, Notary Public___
(insert name and title of the officer)

personally appeared ___Rusteen Rezai___,
who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature _____ (Seal)

SHARON ELIZABETH RODAS
Notary Public - California
Orange County
Commission # 2390150
My Comm. Expires Jan 12, 2026

SCRUTINIZED COMPANIES THAT BOYCOTT ISRAEL LIST CERTIFICATION FORM

THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL. FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

1. The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
2. The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
3. "Boycott Israel" or "boycott of Israel" means refusing to deal, terminating business activities, or taking other actions to limit commercial relations with Israel, or persons or entities doing business in Israel or in Israeli-controlled territories, in a discriminatory manner. A statement by a company that it is participating in a boycott of Israel, or that it has initiated a boycott in response to a request for a boycott of Israel or in compliance with, or in furtherance of, calls for a boycott of Israel, may be considered as evidence that a company is participating in a boycott of Israel; and
4. If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel.

Authorized Signature

Russ Rezai
Printed Name

President
Title

Infosend, Inc.
Name of Entity/Corporation

STATE OF _____

COUNTY OF _____

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization on, this _____ day of _____, 20____, by _____ (name of person whose signature is being notarized) as the _____ (title) of _____ (name of corporation/entity), personally known _____, or produced _____ (type of identification) as identification, and who did/did not take an oath.

_____
Notary Public

_____
Printed Name

See Attached.

My Commission Expires: _____
NOTARY SEAL ABOVE

ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California
County of _____ Orange _____)

On _____ February 13, 2025 _____ before me, ____ Sharon Elizabeth Rodas, Notary Public ____
(insert name and title of the officer)

personally appeared ____ Rusteen Rezai _____
who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

SHARON ELIZABETH RODAS
Notary Public - California
Orange County
Commission # 2390150
My Comm. Expires Jan 10, 2026

Signature _____ **(Seal)**

Compliance with Anti-Human Trafficking Laws*

Compliance with Anti-Human Trafficking Laws

Pursuant to Section 787.06 (13), Florida Statutes, this form must be completed by an officer or representative of a non-governmental entity when a contract is executed, renewed, or extended between the non-governmental entity and the City of Clearwater.

The undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury that:

Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.

The undersigned is authorized to execute this form on behalf of Entity.

Date: February 11 , 2025   Signed: _____

Entity: Infosend, Inc.   Name: Russ Rezai

Title: President

Billing Samples* Provide Example Billing Invoice(s)

InfoSend Invoicing

InfoSend has devised a client-friendly workflow for producing invoices in a reliable, timely and transparent manner. All data for InfoSend's invoicing is driven by the data processing engine, with accurate software and operational controls to ensure counts are reconciled throughout the process.

InfoSend is capable of providing invoices in formats that fit the needs of the client accounts payable for reconciliation. Invoices can be provided via mail and electronically, as well as on a weekly, bi-monthly or monthly schedule.

A standard client invoice will be provided with an invoice number for reference and includes details of each job batch and output performed by InfoSend that resulted in billable items.

INVOICE

AMOUNT PAID	DATE	INVOICE NO.
	2/29/2018	131263

ATTN:
SAMPLE CUSTOMER
PO BOX 1234
ANAHEIM, CA 92807-1234

TERMS	DUE DATE	P.O #	ACCOUNT #	INVOICE
NET 30	3/19/2018		5320	131263

DATE	DESCRIPTION	QTY	RATE	AMOUNT
2/15/18	ABC1214A : Statement Data Processing/Print/Mail Prep Service	37,303		
	ABC1214A : 8.5 x 11 Form	37,303		
	ABC1214A : # 10 Standard Envelope	37,300		
	ABC1214A : Standard #9 Return Envelope	37,267		
	ABC1214A : Statement Postage (Level-1 Sort) (37,296 Mailpieces)	1		
	ABC1214A : Statement Postage (Non Bar-Coded) (7 Mailpieces)	1		
	ABC1214A : Address Update	16		
	ABC1214A : Print Image Archiving - 12 Months Retention	37,303		
	ABC1214A: CHW.1214STMT.0011.PDF			

THANK YOU FOR YOUR BUSINESS

Total

For clients that would prefer to work with the invoice data for additional levels of reconciliation, InfoSend also provides a Process Detail Report for all billable items in a CSV format that may be loaded into Excel. This report for the invoice allows clients to group, sum and analyze the itemized billable elements, from documents to postage, as required for their process.

	A	B	C	D	E	F	G	H	I
1	Job Code	Client ID	Cycle ID	Item Description	Pages	Qty	Rate	Total	
2	INF0617A	513	6766	Additional Dynamic Color Printing fee per page	1	139	1	139	
3	INF0617A	513	6766	NCOA Address Change Service	1	10	1	10	
4	INF0617A	513	6766	Statement Data Processing/Printing/Mailing Service Fee	1	139	1	139	
5	INF0617A	513	9313	Additional Dynamic Color Printing fee per page	1	38	1	38	
6	INF0617A	513	9313	NCOA Address Change Service	1	2	1	2	
7	INF0617A	513	9313	Statement Data Processing/Printing/Mailing Service Fee	1	38	1	38	
8	INF0617A	513	11090	Additional Dynamic Color Printing fee per page	1	52	1	52	
9	INF0617A	513	11090	NCOA Address Change Service	1	2	1	2	
10	INF0617A	513	11090	Statement Data Processing/Printing/Mailing Service Fee	1	52	1	52	
11	INF0617A	513	11102	Additional Dynamic Color Printing fee per page	1	103	1	103	
12	INF0617A	513	11102	DPV Failed/Suppressed	1	1	1	1	
13	INF0617A	513	11102	NCOA Address Change Service	1	9	1	9	
14	INF0617A	513	11102	Statement Data Processing/Printing/Mailing Service Fee	1	103	1	103	
15	INF0617A	513	11133	Additional Dynamic Color Printing fee per page	1	87	1	87	
16	INF0617A	513	11133	NCOA Address Change Service	1	1	1	1	

Electronic Payment Processor(s) * Provide documentation verifying agreements with electronic payment processor(s).

InfoSend's Electronic Billing, Payment and Presentment (EBPP) Solution

As part of InfoSend's comprehensive, single-source Customer Engagement (CE) platform, InfoSend's Electronic Billing, Payment and Presentment (EBPP) solution allows clients to interact with their customers across multiple channels. Driven by InfoSend's Customer Communications Management (CCM), customer preferences on how and where they'd like to be contacted, with mobile, web. IVR and SMS available.

- **Mobile-Ready Customer Engagement:** all products are mobile compatible out of the box, with no app store downloads required of customers. Powered by InfoSend's CCM platform, customer specific messaging extends to the electronic channel.

- **Multi-Channel Payment Collection:** InfoSend's payment platform will consolidate web, telephone, SMS, CSR, in-person EMV and bank payments into a single lockbox file.

- **One-Time and Automatic Payments:** allow customers to quickly make a one-time payment, as well as sign up to have their payment account auto debited with each billing cycle.

- **Paperless Bill Notification and Presentment:** notify customers via email when a new bill is available, and securely deliver exact replica of printed document to customers via the secure portal.

- **Interactive Voice Response (IVR):** accept customer payments via automated phone service with InfoSend-hosted phone number, enabling client phone systems to redirect customers with ease.

- **SMS Text-to-Pay:** enrolled customers may opt in to receive text notifications of new bills, and reply to have the registered payment method drafted for the amount due, speeding up the time to payment.

- **Bank Payments (MasterCard RPPS):** InfoSend can collect payments made via the customer bank and include them within the lockbox file.

- **PCI-Compliant Cloud Based Solution:** electronic billing and payment related products hosted in the cloud by InfoSend in a secure PCI-Level 1 compliant environment.

W-9* Upload your current W-9.

Form W-9
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer
Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

INFOSEND, INC.

2 Business name/disregarded entity name, if different from above.

SAME

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor   ☐ C corporation   ☐ S corporation   ☐ Partnership   ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . _____

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . ☐

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

4240 E. LA PALMA AVE

Requester's name and address (optional)

6 City, state, and ZIP code

ANAHEIM, CA 92807-1816

7 List account number(s) here (optional)

Print or type. See *Specific Instructions* on page 3.

Part I   Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number

3 3 – 0 7 4 8 5 1 6

Part II   Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here | Signature of U.S. person ✍ | Date 01/03/2025

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

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Form **W-9** (Rev. 3-2024)