



**BOARD OF COUNTY COMMISSIONERS**  
**WARREN COUNTY, OHIO**  
406 Justice Drive, Lebanon, Ohio 45036  
[www.co.warren.oh.us](http://www.co.warren.oh.us)  
[commissioners@co.warren.oh.us](mailto:commissioners@co.warren.oh.us)

Telephone (513) 695-1250  
Facsimile (513) 695-2054

**TOM GROSSMANN**  
**SHANNON JONES**  
**DAVID G. YOUNG**

**REQUEST FOR PROPOSALS FOR  
TAX BILL PRINTING AND MAILING SERVICES FOR THE  
WARREN COUNTY TREASURER'S OFFICE**

Sealed proposals for Tax Bill Printing and Mailing Services are to be sent to Warren County Board of County Commissioners, Attention: Krystal Powell, 406 Justice Drive, Lebanon, OH 45036 no later than Thursday, September 15, 2022 @ 4:30 p.m.

The purpose of the RFP is to select a reliable vendor willing to enter into a two-year contract to provide printing and mailing services. The contract shall include the option, by mutual agreement of both parties, to renew the contract for additional one-year periods. There are approximately 110,000 real estate tax parcels in Warren County. Property taxes are billed semi-annually and are typically due in February and July. The Ohio Revised Code requires bills to be mailed at least twenty days prior to the established semi-annual due dates. The County mails approximately 60,000 bills for the first half and approximately 40,000 for the second half billing after eliminations for exempt properties, mortgage escrow, electronically delivered bills and full year payments. In October, third bills are mailed to taxpayers with past due taxes. Typically, there are approximately 3,000 bills for real estate, which the County may choose to print and mail inhouse, or to ask the successful bidder to mail.

**The successful bidder must be an Ohio business entity, or a foreign state business entity registered with the Ohio Secretary of State to do business in Ohio so that there is an Ohio Registered Statutory Agent upon whom service of process may be made.**

Proposal documents are available online at the Warren County's Website at <https://www.co.warren.oh.us/commissioners/Bids/>. Questions regarding the proposal documents should be directed to Barney Wright, Treasurer, at [barney.wright@co.warren.oh.us](mailto:barney.wright@co.warren.oh.us)

This notice is posted on the Warren County website. The Warren County website can be accessed at <https://www.co.warren.oh.us/commissioners/Bids/>. To access project information, click on the project you wish to obtain information about. Please contact the Warren County Commissioners Office at (513) 695-1250 if you have trouble with this procedure or if you need additional information on accessing bid project information on our web site.

By order of the Board of County Commissioners, Warren County, Ohio.

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Tina Osborne, Clerk

# Request for Proposal

## Tax Bill Printing and Mailing Services for the Warren County Treasurer's Office

Issued by: Warren County Board of County Commissioners  
406 Justice Drive  
Lebanon, Ohio 45036  
(513) 695-1250

Proposal Date: August 9, 2022

## TENTATIVE SCHEDULE OF EVENTS

Advertise for Proposals..... August 21, 2022

Proposals Due ..... September 15, 2022 @ 4:30 p.m.

Date of Award by Warren County Commissioners.....TBD

Term of Contract .....December 15, 2022 to December 15, 2024  
*-with additional options of one year each*

\* The county reserves the right to amend the above schedule of events as needed.

## TERM OF AGREEMENT

The Warren County Commissioners, on behalf of Warren County Treasurer, Barney Wright, are seeking Bidders willing to enter into a two-year contract to provide printing and mailing services. The contract shall include the option, by mutual agreement of both parties, to renew the contract for additional one-year periods.

## **CONTACT INFORMATION**

Questions concerning this request for proposal should be addressed to:

- Barney Wright, Treasurer  
Warren County Treasurer's Office  
Barney.wright@co.warren.oh.us  
(513) 695-1300

## GENERAL INFORMATION

- **Real Estate Tax:** There are approximately 110,000 real estate tax parcels in Warren County. Property taxes are billed semi-annually and are typically due in February and July. The Ohio Revised Code requires bills to be mailed at least twenty days prior to the established semi-annual due dates. The County mails approximately 60,000 bills for the first half and approximately 40,000 for the second half billing after eliminations for exempt properties, mortgage escrow, electronically delivered bills and full year payments.
- **Third Billing:** In October, third bills are mailed to taxpayers with past due taxes. Typically, there are approximately 3,000 bills for real estate, which the County may choose to print and mail inhouse, or to ask the successful bidder to mail.
- **Sample Bill:** A sample bill is attached in the form we desire to maintain. We expect to maintain a four-color print for the County's logo and will want to negotiate coloring for the color shaded areas of the bill. We expect to use one color printing on the reverse of the bill, as illustrated. See Attachment 1, Sample Bill for our current presentation.
- **Bill Shell:** We plan to use the sample shell to both print bills in house and to allow owners to print bills for themselves without having to store and provide access to copies that the successful provider has produced. We need to be able to have messages printed in the Message box based on various codes assigned to accounts. The data file, with a key to interpret the various columnar information is available at <ftp://ftp.co.warren.oh.us/>.  
username: wctaxbill password: wctaxbill
- **Barcodes:** The barcode used is the account number, currently printed directly above it.
- **Inserts:** Our interest in inserts is to know first, if it is possible for a supplier to provide that service and second, what the supplier's schedule of charges would be for printing and inserting item if we choose to do that at some future date. We expect that an insert would only be used in the first half mailing. Please provide details about inserts in your response.
- **Postage:** The County is willing to advance postage prior to mailing, if desired, but will require a separate billing for mailing charges with details that allow reconciliation with actual postal service charges.

- **Outgoing Envelope:** Should be printed on one side in one color. Current outgoing envelopes have no printing, but a large window on the left of the envelope with the bill printing visible. See Envelopes, Attachment 2.
- **Return Envelopes:** Only one style of return envelope is necessary, but it should be a special color paper envelope, or have a readily visible color block to immediately identify it as Treasurer's Return Envelope. A return envelope should be stuffed with each outgoing bill envelope.
- **Bidder requirement:** The successful bidder must be an Ohio business entity, or a foreign state business entity registered with the Ohio Secretary of State to do business in Ohio so that there is an Ohio Registered Statutory Agent upon whom service of process may be made.



**BARNEY WRIGHT**  
**WARREN COUNTY TREASURER**  
 406 Justice Dr.  
 Lebanon, Ohio 45036  
 Ph 513-695-1300 Fax 513-695-2921

OFFICE HOURS - 8:30AM - 4:30PM, Monday - Friday  
**SECOND HALF REAL ESTATE 2016**  
**DUE DATE 07/26/2017**

PUBLIC JOHN Q  
 123 SAMPLE RD  
 EXAMPLE OH 99999

|   |                                   |
|---|-----------------------------------|
| <b>TAX ACCOUNT NUMBER:</b>  | <b>9999999.0</b>                  |
| <b>TAX DISTRICT:</b>  | 99 - SAMPLE TWP - SAMPLE LSD      |
| <b>OWNER NAME(ON JANUARY 1, 2016):</b>  | PUBLIC, JOHN Q                    |
| <b>LEGAL DESCRIPTION:</b>   | 4 -3-14 75.6200 AC.<br>8888888888 |
| <b>PROPERTY LOCATION</b>  | 123 SAMPLE RD, EXAMPLE            |
| <b>MESSAGES</b>   |                                   |
| We have incorporated several changes to our billing format. Please call 513-695-1300 if you have questions. If you receive more than one envelope containing tax bills, please advise us of the correct mailing name and address. |                                   |

| APPRAISED VALUE | ASSESSED VALUE (35% OF MARKET) | CAUV           | TAX RATE | NON-BUSINESS CREDIT FACTOR | OWNER OCCUPANCY CREDIT FACTOR | EFFECTIVE RATE (mills) |
|-----------------|--------------------------------|----------------|----------|----------------------------|-------------------------------|------------------------|
| LAND            | 332,020                        | 59,420         |          |                            |                               |                        |
| BUILDING        | 310,510                        | 108,680        | 169,770  | 87.29                      | 0.095927                      | 0.023981               |
| <b>TOTAL</b>    | <b>642,530</b>                 | <b>168,100</b> |          |                            |                               | <b>57.274038</b>       |

| SPECIAL ASSESSMENT          |         |            | CALCULATION OF TAXES   |  |           |
|-----------------------------|---------|------------|------------------------|--|-----------|
| DESCRIPTION                 | CURRENT | DELINQUENT | GROSS REAL ESTATE      |  |           |
| WATER LINE IMPROVEMENTS     | 213.55  | 246.80     |                        |  | 7,336.72  |
| W.C. STORM WATER MANAGEMENT | 5.05    | 5.83       | TAX REDUCTION          |  | 2,522.84  |
|                             |         |            | SUBTOTAL               |  | 4,813.88  |
|                             |         |            | NON-BUSINESS CREDIT    |  | 461.78    |
|                             |         |            | OWNER OCCUPANCY CREDIT |  | 81.12     |
|                             |         |            | CURRENT NET TAX (HALF) |  | 4,270.98  |
|                             |         |            | SPECIAL ASSESSMENTS    |  | 218.60    |
|                             |         |            | DELINQUENT TAX         |  | 12,163.61 |
|                             |         |            | DELINQUENT ASSESSMENTS |  | 252.63    |
|                             |         |            | AMOUNT DUE             |  | 16,905.82 |

| DISTRIBUTION      |          |        |
|-------------------|----------|--------|
| COUNTY            | 518.11   | 12.14% |
| TOWNSHIP          | 523.35   | 12.25% |
| SCHOOL            | 2,904.83 | 68.01% |
| J.V.S.            | 162.02   | 3.79%  |
| SPECIAL DISTRICTS | 162.67   | 3.81%  |

**TO AVOID 10% PENALTY**  
**PAY ON OR BEFORE DUE DATE**  
**07/26/2017**

If you need a stamped receipt, return entire bill with a self-addressed stamped envelope.

Your cancelled check is a valid receipt.

**Return This Portion With Payment**

Please make checks payable to:  
**BARNEY WRIGHT**  
**WARREN COUNTY TREASURER**  
 406 Justice Dr.  
 Lebanon, Ohio 45036

**LAST DAY TO PAY WITHOUT PENALTY**  
**07/26/2017**

Please change address to:

NAME \_\_\_\_\_

STREET \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

**9999999.0**

ACCOUNT NUMBER \_\_\_\_\_

2016-18117

|  |                  |
|--|------------------|
| <b>Account Number:</b>                 | <b>9999999.0</b> |
|  |                  |
| <b>OWNER NAME(ON JANUARY 1, 2016):</b> | PUBLIC, JOHN Q   |
| Delinquent Amount:                     | 12,416.24        |
| Pay This Amount:                       | 16,905.82        |
| Full Year Amount:                      |                  |

Please Provide Daytime Phone Number: \_\_\_\_\_



**BARNEY WRIGHT – WARREN COUNTY TREASURER**  
Phone 513-695-1300

The County Treasurer is the collector of taxes. The Treasurer's Office can provide information about tax delinquency and penalties. Questions regarding your property valuation, or the rate or amount of tax owed, should be directed to the Auditor's Office. Tax rates are set by the voters in the district where the property is located.

**ABOUT YOUR TAX BILL** – Ohio law prescribes the information contained on your Warren County Real Estate tax bill. Only one parcel of property can be included on a bill. Failure to receive a tax bill does not relieve the taxpayer of the obligation to pay any taxes, special assessments, or other charges on or before the due date or to avoid penalty, interest or charges due to late payment, pursuant to Section 323.13 O.R.C.

**LATE PAYMENT PENALTY** – To avoid a penalty, payment must be received by the due date shown on reverse. Mail that is received with a US POSTAL cancellation date of the due date, or prior, will be accepted without penalty. Payments postmarked and received within 10 days after the due date will receive a statutory 5% penalty; for payments received after that, a statutory 10% penalty will be applied.

**TAX INCREASES** – Any increases in the amount of your current real estate tax must be attributed to valuation changes, tax levies, or bond issues. Any increase due to tax levies or bond issues were voted upon and passed by the voters of your taxing district. Note: The County Treasurer has no authority to increase or decrease your real estate tax.

**TO PAY BY CREDIT CARD** - Payments may be made online. Visit: [www.co.warren.oh.us](http://www.co.warren.oh.us) link: Treasurer. A convenience fee will be charged by the service provider.

**ESCROW AGENT** – If your real estate taxes are to be paid by a mortgage company, please forward this bill to them **AND** ask them to notify the Treasurer's Office in writing so we can bill them directly in the future.

**MILITARY EXTENSION** – Provides for an extension of time to pay real property taxes for eligible applicants who have been called to active duty. Contact the Treasurer's Office for further information.

**LEGAL ACTION** – Revised Code Section 5721.10 reads: "Notice: If the taxes are not paid within one year from the date they are certified as delinquent, the property is subject to foreclosure for tax delinquency."

**INTEREST** – Interest will be charged on unpaid or delinquent taxes, at a rate set by the Tax Commissioner, on Aug 1<sup>st</sup> and Dec 1<sup>st</sup> of each year.

**CHECKS NOT HONORED BY YOUR FINANCIAL INSTITUTION** – Any check not honored by your financial institution will cause the payment to be reversed with penalties and interest applied, where applicable.

**MATT NOLAN - WARREN COUNTY AUDITOR - Phone 513-695-1235**

Please call the Auditor's Office for information on the following:  
- Property Value/Tax Charge - Owner Occupancy Credit  
- Current Agricultural Use Valuation - Owner Information  
- Special Assessments - Homestead

**100% APPRAISED / MARKET VALUE** – The Market Value (Sale Value) of property. This is determined by appraisals/reappraisals done by the County Auditor once every six years. Equalization adjustments are made in the third year following reappraisals.

**35% TAXABLE VALUE** – In Ohio, property taxes are levied against the Assessed Value or 35% of the Market Value of the property.

**BOARD OF REVISION** – Allows taxpayers to contest property value. Applications must be filed between Jan 1<sup>st</sup> and Mar 31<sup>st</sup> of each year.

**HOMESTEAD REDUCTION** – Property owners who are at least 65 years of age or totally and permanently disabled, with household incomes that do not exceed the income measured by the Ohio adjusted gross income for the preceding year, may apply for the Homestead Reduction. For more detailed information, contact the County Auditor's Office.

**DISABLED VETERANS** – Veterans who are disabled as a result of a service related injury may be entitled to additional tax reductions. Please contact the Auditor's Office for more details.

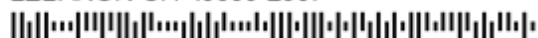
**OWNER OCCUPANCY CREDIT** – Applicable to owner occupied homes granted by state legislature (1979).

Revised Code Section 323.131 (A)(3)(b) reads: "Notice: If the taxes charged against this parcel have been reduced by the owner occupancy credit for residences occupied by the owner but the property is not a residence occupied by the owner, the owner must notify the County Auditor's Office not later than March 31<sup>st</sup> of the year for which taxes are due. Failure to do so may result in the owner being convicted of a fourth degree misdemeanor which is punishable by imprisonment up to 30 days, a fine up to \$250, or both, and in the owner having to repay the amount by which the taxes were erroneously or illegally reduced, plus any interest that may apply."

If the taxes charged against this parcel have not been reduced by the owner occupancy credit and the parcel includes a residence occupied by the owner, the parcel may qualify for the tax reduction. To obtain an application for the tax reduction or further information, contact the County Auditor's Office.

**RESIDENTIAL RENTAL** – Any owner of residential rental property shall file required information with the County Auditor as is expressed in Revised Code Section 5323.03.

BARNEY WRIGHT  
WARREN COUNTY TREASURER  
406 JUSTICE DR - LOWR  
LEBANON OH 45036-2387



Return envelope

Outgoing envelope, returned

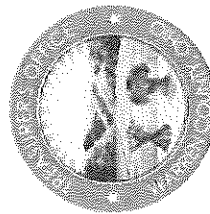
PLACE  
STAMP  
HERE



PRESORTED  
FIRST CLASS MAIL  
U. S. POSTAGE  
PAID  
TPOC

RECEIVED  
JUN 10 2022  
WARREN CO. TREASURER  
WARREN COUNTY OHIO

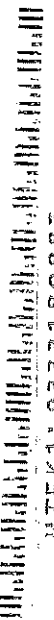
**BARNEY WRIGHT**  
**WARREN COUNTY TREASURER**  
406 Justice Dr.  
Lebanon, Ohio 45036  
Ph 513-695-1300 Fax 513-695-291



**IMPORTANT TAX BILL ENCLOSED**

-R-T-S- 381204049-1N 250 06/02/22

RETURN TO SENDER  
UNABLE TO FORWARD  
RETURN TO SENDER



ANK  
FWD

3812041427

UTFK1: 9323189887

## PROCESSING REQUIREMENTS

### INSTRUCTIONS:

- ✓ Please check the appropriate box following each line item.
- ✓
- ✓ Please fill and execute the affidavits provided.
- ✓ If a service cannot be provided as listed, an explanation is required. Bids from suppliers who cannot provide a desired service will be considered.
- ✓ Proposals containing unanswered line items will be considered non-responsive.

### 1. Custom Forms and Envelopes:

- a. The Service Provider will provide preprinted forms and envelopes. See the sample form and envelopes attached.
  - Service can be provided as listed.
  - Service cannot be provided as listed. Explanation:

### 2. Mailing Address Information:

- a. Prior to mailing tax bills and information sheets, the Service Provider will update mailing address information using NCOA data comparison.
  - Service can be provided as listed.
  - Service cannot be provided as listed. Explanation:
- b. The Service Provider will provide reports from NCOA processing.
  - Service can be provided as listed.
  - Service cannot be provided as listed. Explanation:

### 3. Printing: The Treasurer's office will provide separate data files.

- a. The remittance stub portion of the tax bills must contain a barcode. Standard to be provided by the Treasurer's office.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

b. A postal barcode must be printed on the tax bills.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

c. The data files provided by the Treasurer's office will contain treasurer codes and mortgage codes for individual parcel numbers. The Service Provider will print custom messages provided by the Treasurer's office according to these codes. Sample messages will be provided by the Treasurer's office.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

d. Data sections printed from files onto the tax bills must be able to grow or shrink according to varying sizes of information provided for each parcel number.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

#### 4. **Handling:**

a. The Service Provider will link tax bills going to the same name and address for mailing purposes.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

b. The Service Provider will fold and insert tax bills with return envelopes.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

c. The Service Provider will print and insert flyers as requested by the Treasurer's office.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

- d. The Service Provider will deliver tax bills and information sheets to the post office, with the exception of the special handling codes. Sample handling guidelines will be provided by the Treasurer's office.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

**5. Process:**

- a. The Treasurer's office will submit test data files to the Service Provider via secure FTP site. The file layouts, mapping, and CSV formats will be provided by the Treasurer's office.

The Service Provider will provide an electronic file of proofs for review and barcode testing.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

- b. Once initial proofs are approved by the Treasurer's office, the final data files will be sent to the Service Provider via secure FTP site. The file layouts, mapping, and CSV formats will be provided.

The Service Provider will provide final proofs for review, and barcode testing.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

- c. The Services Provider will balance their data file load totals to the data file totals provided by the Treasurer's office.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

- d. Once the final proofs are approved by the Treasurer's office and the data file totals are verified, run dates will be established by agreement of both parties.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

- e. The Service Provider will provide a searchable electronic file containing all tax bills and information sheets produced for that billing cycle.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

- f. Once the Treasurer's office has established due dates, the Service Provider must provide deadlines for format and data changes, testing, and submission of production files.

Please provide sample deadlines using the example below:

1. Tax due date: February 25<sup>th</sup>
2. Test data file due by:
3. Format and data changes due by:
4. Final data file due by:
5. Bills will be placed in the mail by:

- g. Once the standard design of the bill content is agreed the Service Provider will supply the Treasurer with a file that will allow the county's IT staff to create a copy of a bill in the same style as any mailed bill for any county parcel, whether the Service Provider has prepared and mailed a bill for the parcel or not.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

## 6. Postage:

- a. The Service Provider will presort data for barcode postage rates.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

- b. The Service Provider will invoice the Board of County Commissioners separately for postage. Postage will be charged at actual cost and lowest discounted rate.

Service can be provided as listed.

Service cannot be provided as listed. Explanation:

7. Domicile of Bidder

- a.  Entity is an Ohio entity.
- b.  Entity is a foreign entity registered with Ohio.

# PROPOSED COST OF SERVICES

| <u>Services</u>   | <u>Estimated<br/>Volume</u> | <u>Cost per<br/>Item</u> | <u>Total</u>    |
|---|-----------------------------|--------------------------|-----------------|
| <b>Real Estate:</b>   |                             |                          |                 |
| Real Estate Forms (2 billings per year plus a possible delinquency billing) | 100,000                     | \$ _____                 | \$ _____        |
| Insert Charges: Paper, printing and insertion:                              | 60,000                      | \$ _____                 | \$ _____        |
| #10 Window Envelopes - Logo 'Tax Statement Enclosed'                        | 100,000                     | \$ _____                 | \$ _____        |
| #9 Return Envelopes (PO window box address)                                 | 100,000                     | \$ _____                 | \$ _____        |
| 9 x 12 Window Envelopes - Logo 'Tax Statement Enclosed'                     |                             | \$ _____                 | \$ _____        |
| Data Printing and Handling  |                             | \$ _____                 | \$ _____        |
| NCOA Processing and Reports   |                             | \$ _____                 | \$ _____        |
| Delivery Fee for Tax Bills w/ Special Codes                                 |                             | \$ _____                 | \$ _____        |
| Set-up or special charges:<br>(Please enumerate)                            |                             | \$ _____                 | \$ _____        |
| <b>Total Estimated Cost of Services</b>                                     |                             | <b>\$ _____</b>          | <b>\$ _____</b> |



# BID SUMMARY

**Annual Processing Cost** (*Including One-Time Fees*) \$ \_\_\_\_\_

**Additional Fees Not Reflected on Cost of Services** \$ \_\_\_\_\_

**TOTAL BID** \$ \_\_\_\_\_

**Percentage Increase in Cost – Option Year 1** % \_\_\_\_\_

**Percentage Increase in Cost – Option Year 2** % \_\_\_\_\_

\_\_\_\_\_  
(Name of Company)

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

\_\_\_\_\_  
(City, State, Zip)

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

\_\_\_\_\_  
(Authorized Representative)

\_\_\_\_\_  
(Title)

\_\_\_\_\_  
(Authorized Representative)

\_\_\_\_\_  
(Title)

# RFP REQUIREMENTS

## Proposal Submittal

1. **Introduction and Executive Summary** – Submit a letter of introduction and executive summary of the proposal. The letter must be signed by a person authorized by your company to obligate your company to perform the commitments contained in the proposal. Submission of the letter will constitute a representation that your company is willing and able to perform the commitments contained in the proposal.
2. **Processing Requirements – Proposals that do not address the processing requirements of this RFP will not be considered in the selection process.**
3. **Affidavits** - Affidavits must be executed for the proposal to be considered.
4. **Company Qualifications** – Provide information on your company’s background and qualifications that addresses the following:
  - a. name, address, telephone number, and email address for a contact person; and
  - b. brief description of your company, as well as how any joint venture or third-party association would be structured; and
  - c. description of three projects similar in size and scope implemented by your company including client contact information
5. **Fee Proposal** – Bidder shall list all applicable fees, including:
  - a. one-time set up fees; and
  - b. any additional fees or charges not addressed in this RFP; and
  - c. percentage increase in cost for optional renewal year 1 and year 2.

In connection with the fee proposal, please complete the Cost of Services and Bid Summary pages. Attach supplemental pages as needed.

## **Errors and Omissions in Proposal**

Failure by the County to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the Bidder from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP.

## **Financial Responsibility**

The County accepts no financial responsibility for any costs incurred by a company in responding to this RFP. Submissions of the RFP will become the property of the County and may be used by the County in any way deemed appropriate.

## **Selection Process for all Services:**

1. One original and one copy of the proposal must be delivered on or before September 15, 2022, by 4:30 p.m. E.T., to:

**Warren County Board of County Commissioners' Office**  
**Attn: Krystal Powell, Deputy Clerk**  
**Administration Building**  
**406 Justice Drive**  
**Lebanon, OH 45036**

2. Proposals shall be plainly marked "**PROPOSAL FOR TREASURER'S TAX BILL PRINTING AND MAILING SERVICES**"
3. Each proposal will be evaluated by a committee of qualified individuals for responsiveness to the requirements of this request for proposal. Proposals will be ranked using the following criteria and weightings:

| <u>Criteria</u>            | <u>Weight</u> |
|----------------------------|---------------|
| Cost                       | 45 points     |
| Processing capabilities    | 35 points     |
| Experience and references  | 15 points     |
| Proximity to Warren County | 5 points      |

4. Vendors submitting proposals may be requested to make a presentation to the selection committee to explain their proposal and to answer any questions.
5. The selection committee will select a vendor with whom staff shall commence contract negotiations. The selection of any proposal shall not imply acceptance by the County of all terms of the proposal, which may be subject to further negotiations and approvals before the County may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time the selection committee, in its sole discretion, may terminate negotiations with the highest ranked vendor and begin contract negotiations with the next highest ranked vendor.

6. The County shall select the vendor which in its opinion has made the best proposal and shall award the contract to that vendor.
7. Warren County reserves the right to reject any and all proposals.

**CERTIFICATE OF COMPLIANCE**  
**NON-DISCRIMINATION AND EQUAL EMPLOYMENT OPPORTUNITY AFFIDAVIT**

STATE OF \_\_\_\_\_:

COUNTY OF \_\_\_\_\_:

\_\_\_\_\_, being first duly SWORN, deposes and says that he is the \_\_\_\_\_ of \_\_\_\_\_ the party who made the foregoing proposal; that such party as a bidder does not and shall not discriminate against any employee, applicant for employment, resident, or prospective resident, because of race, religion, color, sex, or national origin. If successful as the bidder under the foregoing proposal, the party shall post nondiscrimination notices in conspicuous places available to employees and applications for employment setting forth the provisions of this affidavit.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Affiant

\_\_\_\_\_  
Company/Corporation

\_\_\_\_\_  
Address

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

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 2022, by \_\_\_\_\_, of \_\_\_\_\_, an Ohio Corporation, for and on behalf of said corporation.

\_\_\_\_\_  
Notary Public

My Commission expires: \_\_\_\_\_

**FINDINGS FOR RECOVERY AFFIDAVIT**

**STATE OF** \_\_\_\_\_  
**COUNTY OF** \_\_\_\_\_, SS:

\_\_\_\_\_, upon being duly cautioned and sworn, hereby states the following based on personal knowledge:

1) That he/she is \_\_\_\_\_ (title), of \_\_\_\_\_ (name of bidder) and authorized to execute this affidavit; and,

2) That \_\_\_\_\_ (name of bidder) is not a person or entity against whom a finding for recovery has been issued by the Auditor of State, which finding for recovery is unresolved as defined in Ohio Revised Code [General Provisions] Section 9.24 (B); and,

3) That \_\_\_\_\_ (name of bidder) does not appear in the database of unresolved findings of recovery maintained by the Auditor of State pursuant to Ohio Revised Code [General Provisions] Section 9.24 (D).

\_\_\_\_\_  
Affiant

Sworn to and subscribed in my presence this \_\_\_\_\_ day of \_\_\_\_\_, 2022.

\_\_\_\_\_  
Notary Public  
My Commission expires: \_\_\_\_\_

**Additional Notice to Bidders**  
**Request for Proposals**  
**Tax Bill Printing and Mailing Services**  
**For the Warren County Treasurer's Office**

Various questions relating directly or indirectly to the Request have been received. To answer them, and provide similar information to all interested parties, this Additional Notice has been prepared. Additional questions may be submitted until September 8 and, if any are received, a second additional notice may be posted to respond to them by September 12 at the latest. Unanswered questions that arise after September 8 that influence a bid should be presented and discussed by a bidder as a part of their response. Costs relating to various suggested answers will be appreciated.

Warren County has several divisions which operate separately under the umbrella of the County Commissioners. A question has been presented about planned additional RFPs for banking services or other matters to be issued in the future. The County Treasurer is not considering any other requests for proposals and sees no need to consider requests for other services related to the Office's operation at this time. There is no information available about any such possible requests from departments other than the County Treasurer's Office.

The Treasurer's Office has terminated its contract with the prior provider of print and mailing services. The bills for the for first and second half 2021 bill printing and delivery to the post office are attached as exhibits. The second half bill is detailed, but detail for the first half is missing. Rates for the individual line items did not change, but we did insert a letter to each account with the first half mailing. Postage is billed separately and presumed to be the same regardless of whomever we retain to print.

Volumes have been gradually increasing as the county grows. The following table reflects the mail count for first and second half 2021 bills mailed this year. Mortgage company bills are mailed in flats.

|                  | First half | Second half |
|------------------|------------|-------------|
| Individual bills | 58,772     | 39,007      |
| Mortgage Co.     | 743        | 1,004       |
| PDF              | 58,772     | 39,007      |

The County uses an accounting system for real estate taxes that was developed by and is maintained by in house staff. As a result of recent upgrades that will become effective this fall, the format of the bill's front page has been slightly modified. Samples of the new front page, one without and one with individual account information is attached as an additional exhibit. Color is expected as indicated on these samples.

The message box will accommodate 4 lines of text with approximately 60 spaces per line. All messages will be drafted to fit in the box as shown. We expect to have fewer than 10 possible messages to call for – and will only use one message for any individual bill. The Special Assessments box may have up to 6 lines of Special Assessments to report. Distributions will be limited to 7 categories. The bar code printed in the payment stub section of the bill is the bar code for the account number and is an essential item in minimizing our internal processing of the payment. All information spaces are sized to fit in the bill sections as presented, so there is no need to expand or shrink the one, standard front page.

The back page of the bill remains the same as it currently stands. A copy of the outgoing mail envelope has been added as an exhibit to show the dimensions and the location of address window. We expect the successful bid will include pricing for the NCOA processing (research for the proper code and code printing under the address) necessary to secure the maximum postal discounts available.

Additional inserts require approval by the Treasurer of State and have been very rare. In the last 5 years we have had one 8 ½ x 11 page for a letter to taxpayers. We would like to know what the charge would be for printing and insertion of an additional sheet if we deem it useful and can obtain the necessary approvals.

Tax bills going to the same address should be stuffed into a common envelope to minimize postage expense. They do not need to be linked in any other way. We would like a file of the .pdf images of the bills sent out but have not asked for it to be indexed.

While we have a legal requirement to mail bills at least 20 days prior to the due date, we seek to give our property owners at least 4 and preferably 5 weeks to pay. If due dates are the last Wednesdays in February and July, this requires mailing in mid to late January and June.

As indicated in the original Request for Proposal, we currently provide web access for our property owners to access their property bill and either pay it online or print the bill themselves. We need no additional services related to those matters. We do not expect to link our system to any other external payment system.

If there is difficulty in accessing the data file, please contact Barney Wright, at 513.695.1300 or [barney.wright@co.warren.oh.us](mailto:barney.wright@co.warren.oh.us).



1269015

RFP - ADDITIONAL INFORMATION 01/11/2022

02/28/2022

\*Six Thousand Five Hundred Forty-six Dollars and 66 Cents\*

PAY TO THE ORDER OF      FUND      1000      AMOUNT      \$6,546.66

BERKONE INC  
1883 JURY ROAD  
PEN ARGYL, PA 18072

# FILE COPY NON-NEGOTIABLE

| Warren County, Lebanon, OH 45036 |                | PAGE: 1 OF 1  | CHECK NUMBER: 01269015 |
|----------------------------------|----------------|---|------------------------|
| INVOICE DATE                     | INVOICE NUMBER | DESCRIPTION   | INVOICE AMOUNT         |
| 02/16/2022                       | 22010456       | TRE INV#22010456 PRINT/MAIL REAL ESTATE BILLS<br>Voucher #: 154428<br>GL#:1101-10-1130-TRE-0000-0000-5400 - | \$6,546.66             |

| Vendor No. | Vendor Name | Check No. | Check Date | Check Amount |
|------------|-------------|-----------|------------|--------------|
| 1955       | BERKONE INC | 1269015   | 02/28/2022 | \$6,546.66   |



www.BerkOne.com

Invoice questions?  
Please call 610-954-9575, option 2

Invoice Date: July 31, 2022  
Invoice No: 22070449  
Account No: Warren County  
PO #:

RECEIVED

AUG 09 2022

WARREN CO. TREASURER  
WARREN COUNTY OHIO

Terms: Net 30. 1.5% Per Month Late Charge

Email:  
Cinda.Schuler@co.warren.oh.us  
Janice.Sexton@co.warren.oh.us  
Barney.wright@co.warren.co-us

To:  
Warren County  
406 Justice Drive  
Lebanon, OH 45036

| Description                   | Pieces      | Rate     | Amount     |
|-------------------------------|-------------|----------|------------|
| Bills                         | 39,007.0000 | \$0.0950 | \$3,705.67 |
| Bills - Mortgage              | 1,004.0000  | \$0.0950 | \$95.38    |
| Envelopes - Flat              | 223.0000    | \$0.0100 | \$2.23     |
| NCOA Processing               | 31,722.0000 | \$0.0050 | \$158.61   |
| PDF Creation - Archive Images | 39,007.0000 | \$0.0100 | \$390.07   |
| Invoice Total:                |             |          | \$4,351.96 |
| Total Due:                    |             |          | \$4,351.96 |

Keep Upper Portion for Your Records

Remittance Stub

Warren County

Invoice Date: July 31, 2022  
Invoice No: 22070449  
Account No: Warren County  
PO #:



Make all checks payable to:



Accounting Department  
1883 Jury Road  
Pen Argyl, PA 18072

|              |            |
|--------------|------------|
| Total Due:   | \$4,351.96 |
| Amount Paid: | \$         |

110036090000449072200000435196





**BARNEY WRIGHT  
WARREN COUNTY TREASURER**

406 Justice Dr.  
Lebanon, OH 45036  
Ph 513-695-1300 Fax 513-695-2921

THIRD WIND HOLDINGS LLC  
6338 SNIDER RD BOX 1  
MASON OH 45040

OFFICE HOURS - 8:30AM - 4:30PM, Monday - Friday  
**FIRST HALF REAL ESTATE 2021  
DUE DATE 2/24/2021**

|   |                                       |
|---|---------------------------------------|
| <b>TAX ACCOUNT NUMBER:</b>  | <b>0506231</b>                        |
| <b>TAX DISTRICT:</b>  | 5-SPRINGBORO CORP-SPRBORO CSD         |
| <b>OWNER NAME (ON JANUARY 1, 2021):</b>   | THIRD WIND HOLDINGS, LLC              |
| <b>LEGAL DESCRIPTION:</b>   | ROYAL OAKS PARK LOT: 47<br>0413278008 |
| <b>PROPERTY LOCATION</b>  | 135 MARKET STREET, SPRINGBORO         |
| <b>MESSAGES</b>   |                                       |
| We have provided a payment kiosk as well as a simple drop box in the County Amin. Bldg. lobby to accept tax payments, in addition to the online payment options on our website. |                                       |

|                         | APPRAISED VALUE | ASSESSED VALUE (35% OF MARKET) | CAUV          | TAX RATE  | NON BUSINESS CREDIT FACTOR | OWNER OCCUPANCY CREDIT FACTOR | EFFECTIVE RATE (mills) |
|-------------------------|-----------------|--------------------------------|---------------|-----------|----------------------------|-------------------------------|------------------------|
| AG/RES LAND             | 30,750          | 10,760                         | 30,750        | 76.360000 | 0.087502                   | 0.021875                      | 43.840518              |
| AG/RES BUILDING         | 81,920          | 28,670                         | 0             | 76.360000 | 0.087502                   | 0.021875                      | 43.840518              |
| COM/IND LAND            | 0               | 0                              | 0             | 76.360000 | 0.086068                   | 0.021517                      | 48.049349              |
| COM/IND BUILDING        | 0               | 0                              | 0             | 76.360000 | 0.086068                   | 0.021517                      | 48.049349              |
| PUBLIC UTILITY LAND     | 0               | 0                              | 0             | 76.360000 | 0.000000                   | 0.000000                      | 76.360000              |
| PUBLIC UTILITY BUILDING | 0               | 0                              | 0             | 76.360000 | 0.000000                   | 0.000000                      | 76.360000              |
| <b>TOTAL</b>            | <b>112,670</b>  | <b>39,430</b>                  | <b>30,750</b> |           |                            |                               |                        |

| SPECIAL ASSESSMENT                       |               |   | CALCULATION OF TAXES |          |
|--|---------------|---|----------------------|----------|
| DESCRIPTION                              | CURRENT       | DELINQUENT  |                      |          |
| NO SPECIAL ASSESSMENTS FOUND FOR ACCOUNT |               |   | GROSS REAL ESTATE    | 1,505.44 |
|  |               |   | TAX REDUCTION        | 641.12   |
|  |               |   | SUBTOTAL             | 864.32   |
|  |               |   | NON-BUSINESS CREDIT  | 75.63    |
|  |               |   | CURRENT NET TAX      | 788.69   |
|  |               |   | AMOUNT DUE           | 0.00     |
| DISTRIBUTION                             |               | <p style="text-align: center;"><b>TO AVOID 10% PENALTY<br/>PAY ON OR BEFORE DUE DATE<br/>2/24/2021</b></p> <p>If you need a stamped receipt, return entire bill with a self-addressed stamped envelope.</p> <p>Your cancelled check is a valid receipt.</p> |                      |          |
| COUNTY                                   | 27.27 3.46%   |   |                      |          |
| TOWNSHIP                                 | 138.13 17.51% |   |                      |          |
| SCHOOL                                   | 537.61 68.16% |   |                      |          |
| J.V.S.                                   | 35.49 4.50%   |   |                      |          |
| CORPORATION                              | 19.70 2.50%   |   |                      |          |
| SPECIAL DISTRICT                         | 30.49 3.87%   |   |                      |          |

Return This Portion With Payment

Please make checks payable to:  
**BARNEY WRIGHT  
WARREN COUNTY TREASURER**  
406 Justice Dr.  
Lebanon, OH 45036

Please change address to:

NAME \_\_\_\_\_

STREET \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

**0506231**

ACCOUNT NUMBER \_\_\_\_\_

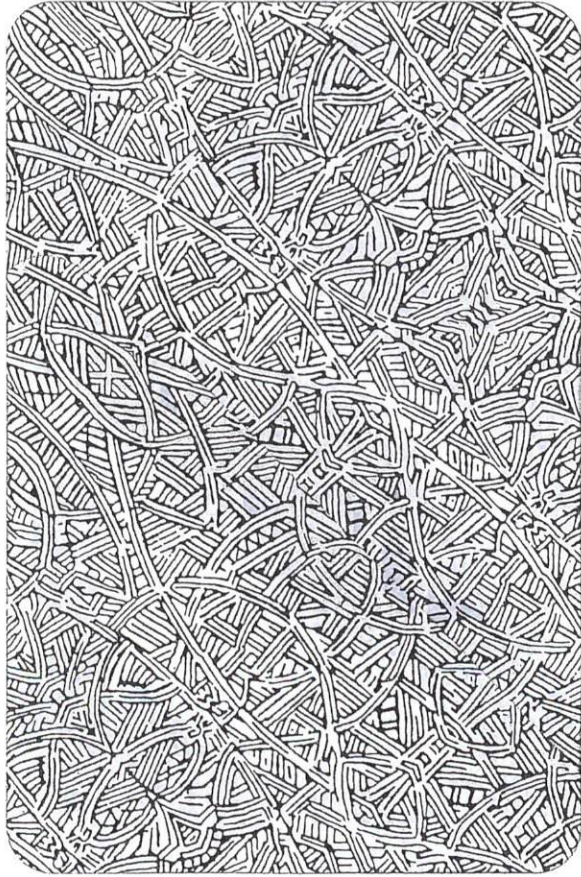
**LAST DAY TO PAY WITHOUT PENALTY  
2/24/2021**

|   |        |
|---|--------|
| <b>Account Number: 0506231</b>                                      |        |
|   |        |
| <b>OWNER NAME (ON JANUARY 1, 2021):</b><br>THIRD WIND HOLDINGS, LLC |        |
| Delinquent Amount:  | 0.00   |
| Pay This Amount:  | 0.00   |
| Full Year Amount:   | 788.69 |

Please Provide Daytime Phone Number \_\_\_\_\_

# OUT GOING ENVELOPE

Presorted  
First-Class Mail  
US Postage  
Paid  
TPCC





**BOARD OF COUNTY COMMISSIONERS**  
**WARREN COUNTY, OHIO**  
406 Justice Drive, Lebanon, Ohio 45036  
[www.co.warren.oh.us](http://www.co.warren.oh.us)  
[commissioners@co.warren.oh.us](mailto:commissioners@co.warren.oh.us)

Telephone (513) 695-1250  
Facsimile (513) 695-2054

**TOM GROSSMANN**  
**SHANNON JONES**  
**DAVID G. YOUNG**

**AUTHORIZE THE TREASURER TO INITIATE CONTRACT NEGOTIATIONS WITH HARRIS LOCAL POINT FOR TAX BILL PRINTING AND MAILING SERVICES FOR THE WARREN COUNTY TREASURER**

WHEREAS, with the adoption of Resolution #22-1228 on August 09, 2022, the Warren County Board of County Commissioners approved the issuance of a request for qualifications to interested vendors for tax bill printing and mailing services for the Warren County Treasurer's Office; and

WHEREAS, seven proposals were received, reviewed, and scored by the County Treasurer based on the criteria set forth in the request for proposal; and

WHEREAS, based on the rankings the County Treasurer, Barney Wright, recommends entering into contract negotiations with the top ranked vendor; and

NOW THEREFORE BE IT RESOLVED, that the Board accepts the evaluation and rankings which are attached, and further authorizes the Treasurer to enter into contract negotiations with the highest ranked vendor, Harris Local Point.

Mrs. Jones moved for adoption of the foregoing resolution being seconded by Mr. Grossmann. Upon call of the roll, the following vote resulted:

Mr. Young – absent  
Mr. Grossmann – yea  
Mrs. Jones – yea

Resolution adopted this 4<sup>th</sup> day of October 2022.

BOARD OF COUNTY COMMISSIONERS

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Tina Osborne, Clerk

cc: Treasurer (file)  
Bid File



**BOARD OF COUNTY COMMISSIONERS**  
**WARREN COUNTY, OHIO**  
406 Justice Drive, Lebanon, Ohio 45036  
*www.co.warren.oh.us*  
*commissioners@co.warren.oh.us*

Telephone (513) 695-1250  
Facsimile (513) 695-2054

**TOM GROSSMANN**  
**SHANNON JONES**  
**DAVID G. YOUNG**

ENTER INTO CONTRACT WITH HARRIS LOCAL GOVERNMENT FOR TAX BILL  
PRINTING AND MAILING SERVICES ON BEHALF OF THE WARREN COUNTY  
TREASURER

WHEREAS, pursuant to Resolution #22-1496 adopted October 4, 2022, this Board authorized the initiation of negotiations with Harris Local Government for tax bill printing and mailing services for the Warren County Treasurer's Office; and

WHEREAS, all required documentation has been submitted by the contractor; and

NOW THEREFORE BE IT RESOLVED, to enter into contract with Harris Local Government, 2017 East Main Street, Easley, SC 29640, for tax bill printing and mailing services for the Warren County Treasurer for a total contract price of \$62,675.00; as attached hereto and made a part hereof.

Mrs. Jones moved for adoption of the foregoing resolution being seconded by Mr. Young. Upon call of the roll, the following vote resulted:

Mr. Grossmann – yea  
Mr. Young – yea  
Mrs. Jones – yea

Resolution adopted this 25<sup>th</sup> day of October 2022.

BOARD OF COUNTY COMMISSIONERS

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Tina Osborne, Clerk

KP/

cc: c/a— Harris Local Government  
Treasurer (file)  
OMB Bid file