



ORIGINAL

An Innovative Outsourcing Partner

InfoSend, Inc. Response to:

City of Aurora

Request for Proposal 21-19

Utility Invoice Production/Distribution Services for the Water Billing Division

Technical Proposal

Due: April 7, 2021

Time: 2:00 PM CST

Prepared for: City Clerk's Office

Provided by: Tom Bleers
Territory Sales Manager
tom.b@infosend.com
Office: 714.993.2690

Marty Bielecki
Sales Executive
marty.b@infosend.com
Office: 714.993.2690
Mobile: 239.247.4419

Table of Contents

Table of Contents.....	2
1. Cover Transmittal Letter.....	3
2. Terms and Conditions	5
3. Capabilities	6
Response to Scope of Work	16
4. Resumes for Key Personnel	22
5. Timing	23
6. Resource Requirements	24
7. Municipal/Government Agency References (minimum of three)	25
8. General	27
Required Forms	28
Proposer's Checklist.....	28
Proposer's Certification.....	29
Proposer Tax Certification	31
Contact Information	33
Vendor Application.....	34
Appendix.....	38

1. Cover Transmittal Letter

On company letterhead, provide a narrative which introduces the firm and team highlighting the special strengths of the firm to perform the work requested in this RFP. The letter should be signed by an authorized principal of the proposing consulting firm.

April 07, 2021

City of Aurora
44 E Downer Place, 1st Floor
Aurora, Illinois

Re: Request for Proposal 21-19 Utility Invoice Production/Distribution Services for the Water Billing Division

To the City of Aurora RFP review committee:

InfoSend Incorporated thanks the City of Aurora for its continued business since 2011. We are pleased to present this response to the City of Aurora, based on its Request for Proposal 21-19 Utility Invoice Production/Distribution Services for the Water Billing Division, due April 7, 2021 at 2:00 PM EST.

InfoSend is the City of Aurora's incumbent vendor for utility statement printing and mailing services, having provided this service since originally contracting with the City in 2011. We are appreciative of our working relationship for the past 10 years and are confident that our offering and benefits presented herein will continue to provide the City and its constituents with the greatest value in the market today. InfoSend has years of experience providing data processing and printing service, leveraging our extensive knowledge of your data files and document layouts, and providing Illinois-based production that ensures some of the fastest USPS delivery times. InfoSend has provided information and pricing for current services we are offering the City of Aurora. In addition, we have offered some optional services for consideration, including our Print Image Archive with API connection providing the option of supporting bill presentment via your current eBilling vendor (if needed). The Print Image Archive also features USPS mail tracking capability.

Keeping in mind volatile current events, we want to highlight InfoSend's investment in true disaster recovery backup across multiple facilities, meaning that InfoSend has the capability of switching production to another printing center should one need to close. During our working relationship with the City of Aurora, InfoSend has acquired two additional production facilities besides Illinois and California. The addition of Texas, and Florida are to provide backup to our Illinois production facility and California headquarters. This is a truly mirrored production environment enabling immediate switchover if needed. We suggest that during your review, City of Aurora should at a minimum prioritize vendors that have two production facilities in different states, that both production facilities are owned and operated by that vendor, that both facilities are used on a daily basis and can perform City of Aurora's jobs without interruption, and that there is no cost to test the DR capabilities by moving production from one state to another for a one or multiple jobs. Some of the vendors in our industry have one main production facility and market a disaster recovery facility that isn't built out with the right equipment to provide true back up to the primary facility. Some vendors contract with a third party, which isn't the same as owning the facility and operating it on a daily basis. We are happy to provide further information about Disaster Recovery backup and our company's investment in making sure our production guarantees are backed by tangible protections.

InfoSend Advantages and Differentiators

- Extensive and successful experience working with the City of Aurora for 10 years
- Extensive experience working with Sungard (Central Square) data
- Wholly owned and operated out of 4 regional production facilities. We never use subcontractors to sub excess printing volume out to other vendors.
- Success working with 35 Sungard (Central Square) clients.
- Since City of Aurora is a client no conversion or implementation needed. Ongoing successful service.
- 24+ 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.
- Capacity to handle both high-volume and low-volume, specialized print and mailing requests with fast turn-around times.
- PCI Level 1 Compliant and SOC Type I & II Audited
- Specializes in supporting over 600+ utility clients nationwide

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 24+ 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. We firmly believe that continuing our partnership with the City of Aurora will result in an efficient and cost-effective back office operation. Thank you for this opportunity to present our services.

Sincerely,



Russ Rezai
President
Russ.r@infosend.com
O. 714.993.2690
F. 714.993.1306



Marty Bielecki
Sales Executive
marty.b@infosend.com
M. 239.247.4419
O. 800.955.9330 x 705



Tom Bleers
Territory Sales Manager
tom.b@infosend.com
M. 312.720.0459

2. Terms and Conditions

List any terms and conditions within the proposed contract that would change the requirements of the Proposal.

InfoSend and the City of Aurora are currently in a contractual agreement. As it stands there are no terms and conditions within the proposed contract that would change the requirements of the proposal.

3. Capabilities

Please include responses to the following in this section:

a) What depth of experience and strengths does your firm have in bill rendering services?

Get to Know InfoSend - A Reliable Partner

InfoSend has provided business process outsourcing services since 1996, handling the processing and distribution of 220 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 currently provides these types of services to over 600 clients nationwide including over 475 municipalities that provide utility services such as Water, Wastewater, Drainage, Solid Waste, Electric, and additional charges.

InfoSend's Customer Communications Management (CCM) platform distributes critical documents across multiple channels, including InfoSend's own manufacturing environments in California, Texas, Illinois, and Florida for Data Processing, Printing, and Mailing (DPPM). InfoSend's hosted Electronic 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.

After careful analysis of the RFP, we understand that one of the greatest concerns is that any delay in the printing and delivery process can result in significant impacts to City of Aurora and your customers. Using our extensive, long-term experience in the Utility Industry and with City of Aurora's jobs specifically, InfoSend has developed a print and mail platform that provides an advanced technological solution that is accurate (99.9996%), reliable, and highly efficient. This advanced solution not only meets your needs today but will carry them into the future.

Integrity is at the core of InfoSend, with a stated goal to retain and provide complete satisfaction for each client. InfoSend has over 170 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.

b) How much of your work has been government based?

Our work is 74% government based. Specializing in municipal utilities.

c) Is a dedicated account specialist assigned to each of your customers?

Yes, each client has a dedicated account specialist assigned to them.

d) Does your firm have the ability to interface with SunGard Public Utility application?

InfoSend currently has 35 active clients using the Sungard (Central Square) platforms, with over 100 successful implementations over the last 2 decades. Your unique data is transferred into our database where it can then be output to multiple destination channels – print, web, or telephone. With our online tools and outstanding customer service, we know the City will continue getting value no other company can provide.

e) How are bill modifications that we request handled?

InfoSend can produce the City's bill in the current format. As you know if the City decide to make small bill modifications, InfoSend can provide this at no cost to the City. Should the City decide to make major modifications, the InfoSend team can provide extensive experience on bill redesign recommendations and support.

Client Application Change Management

InfoSend's Client Services team is experienced in assisting clients with change requests that range from quick document updates through complex conversions that affect the underlying data and complete document design. Throughout the life of the application, InfoSend's dedicated Account Manager will remain the point of contact, providing client-specific insight and knowledge to ensure change requests are handled with expertise and first hand experienced. InfoSend maintains a tightly controlled Client Application Change Management program to ensure accuracy, quality, and timeliness of changes to output.

InfoSend's manages changes to client applications with the following controls:

1. **Requirements Gather:** the client request is logged in the InfoSend internal CRM tool by the dedicated Account Manager. Required assets such as mockups and example data files are gathered from the client, if required, to ensure the scope is defined.
2. **Scoping and Statement of Work (SOW):** The Account Manager reviews the request internally and defines a scope with the assistance of the InfoSend IT programmer assigned to the project. Once a scope is determined, InfoSend will present the client with a Statement of Work (SOW), which will include the Professional Services hours (PS) and timeline to delivery. InfoSend's change request delivery times vary based on the scope:
 - 1 PS Hour – Up to 3 business days
 - 2-3 PS Hours – Up to 4 business days
 - 4-5 PS Hours – Up to 6 business days
 - 6-10 PS Hours – Up to 2 calendar weeks
 - 11-20 PS Hours – Up to 5 calendar weeks
 - 21-30 PS Hours – Up to 8 calendar weeks
 - > 30 PS Hours – TBD based on requirements and scope of work

*InfoSend does not bill for changes that require under 1 PS Hour

3. **Application Build, Testing, Tracking:** upon client approval of the SOW, the change request enters the InfoSend queue and works begins according to the timeline. The changes are built, approved with the following milestones:
 - o **Project Tracking:** Depending on the scope of the change request, a project tracking document may be utilized to ensure all scope items are monitored, reviewed and approved by the client.
 - o **Development Environment:** changes are made by the InfoSend programmer in a controlled, separated development environment, using code source control.
 - o **Sample Review and Approval:** InfoSend's dedicated Account Manager reviews samples, and if acceptable provides them for Client review, feedback and sign off. If a project tracking doc was utilized, all open scope items are reviewed individually with the client prior to approval.
4. **Deployment:** client approval is logged in the CRM tool, and the code deployment is scheduled. Code changes are checked in and deployment to production is performed by authorized personnel. For projects where output was completely redesigned, InfoSend's Account Manager is required to complete a First Live run review, and complete a Go Live checklist to ensure accuracy. At client discretion, InfoSend may also enable Sample Approval workflow for the client to review the first live run prior to release to customers.

f) What is the name and location of the Bulk Mailing unit used for mailings?

Midwest & Northeastern US Production Facility
1406 Centre Circle · Downers Grove IL 60515

InfoSend owns and operates a 25,000 sq. ft. Midwest production and disaster recovery facility located in Downers Grove, just west of Chicago, Illinois. This facility is used to process mail for clients located in the Midwest or Northeast, and also serves as an out of state disaster recovery facility. The location is designated as a USPS Detached Mail Unit (DMU) with USPS representatives working on-site. This is the facility where the statements for the City of Aurora are inducted into the mail stream.



g) Is your firm capable of producing inserts? Bill messages?

InfoSend Direct Communication

Direct Communications are non-recurring document types that directly communicate information to client customers. InfoSend has developed tools and workflow to support clients in efficiently communicating with customers, saving on postage and materials where possible.

InfoSend's dedicated personnel, IT-centric structure, and automated data processing capabilities make client one-time projects as efficient to manage as possible. InfoSend will work with client marketing department and accept most common graphic arts file types such as PDF, EPS, InDesign, and Illustrator. Proofs are printed on the digital color equipment that will produce campaigns. Direct communication documents are normally printed in full color or grayscale onto white paper stock.

Direct Communications - Inserts

Selective Inserting is available, which allows clients to selectively target insert, flyers, or newsletters to specific mail pieces. Selective Inserting will also allow clients to exclude a #9 return envelope for all customers participating in an automatic payment program (ACH). Individual documents can be grouped together ("householding") if desired. InfoSend gives clients multiple insert handling and production options, along with fully featured tools to manage the process:

Insert Requests & Management - InfoSend's online Insert Request Form is an innovative account management tool that streamlines insert management. Request a quote for printing and schedule all client inserts online. Submit the form through the InfoSend website and a summary of the request will be returned to the user via email. eInserts: InfoSend can also optionally include PDF images of client inserts in the Print Image Archive and/or in the documents created by InfoSend's eBusiness products.

Insert Handling – Client Provided - Any special inserts/flyers/stuffers prepared by the client can be inserted with the bills. Clients can drop inserts off or have them shipped to InfoSend where they will be kept in inventory until the end of the run date.

Insert Printing - InfoSend offers a complete range of insert printing services, from black to full-color printing.

- **Inline Inserts** - if the client organization often includes static inserts with its bills, InfoSend can convert them to Inline Inserts. An automated process is set up to selectively print the inserts immediately after each bill is printed. This increases client ability to target specific customer types and provide one-to-one messaging. Inline inserts can be printed in black or **full color**.
- **Offline Inserts** – traditional inserts are printed offline and then inserted with designated billing statements. Up to 5 offline inserts can be included in a bill run.

Direct Communications – Postcards and Envelope Messaging

- **Postcards** - recurring postcard jobs can be set up to send cost-effective hard copy communications to client customers or prospective customers. Small postcards qualify for the discounted postcard postage rate. Postcards are the most effective type of direct marketing and communications, as email is often ignored or caught in spam filters.
- **Show Document Messages through the Envelope Window** - Important messages can be printed on client documents in black or **full color** and shown through the outgoing envelope window. This is the most economical form of showing brief messages or images to the customer before they open the mail piece. This can help incentivize the customer to open the envelope right away by printing messages such as "INVOICE ENCLOSED".
- **Print Messages on the Outside of the Standard Envelope** - Custom messages and images can be printed onto the standard InfoSend #10 double window envelope. This allows clients to print a high amount of content on the outside of the envelope as InfoSend can print on both sides of the envelope. This type of printing is referred to as "sniping" and usually used to print temporary content on a month or two worth of envelope stock. It is more cost effective to digitally inkjet print this content onto pre-manufactured envelopes than to order truly custom stock that was manufactured specifically for clients.

Direct Communications – One Time Mailings

One-time print and mail projects can be set up relatively quickly. They can be used in scenarios where an insert will not work and the topic clients are communicating must be sent out as a separate mailing.

- Examples are customer rate change notices or any other important notices that must be sent separately from regular bills or other regular mailings.
- Expedited projects are possible if clients have an emergency and must send out a notification on short notice.
- Example formats are postcards, letters that are inserted into a #10 envelope and letters that are folded and tabbed.

Message Manager

This free account management tool is a custom-built web-based application that allows clients to control the messages that print on output. Clients can schedule the messages months or even years in advance, as well as set criteria to assign unique messages to different types of customers, or even to individual accounts. A PDF preview displays the message in the actual font that will be used.

h) How are billing errors, last minute change requests and/or any other potential issues escalated?

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 via the online support ticket tool that is located 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.

i) Is there a contact available for any issues that arise during non-business hours?

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:
 - Log, track & close support requests
 - View & update support requests
 - Access published documentation
 - Access available downloads
 - Download reports
 - View Job Tracking statistics
 - Download sample files in PDF format

j) Please explain internal control processes to be used to ensure billing accuracy and record keeping.

InfoSend Quality Control

InfoSend has been in business since 1996, with the founders starting the business on the assumption 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 demands 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).

k) Provide any additional information on capabilities that your firm can provide including but not limited to electronic bill presentment and payment.

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.
- **Bill Notification and Presentment:** notify customers via email when a new bill is available, and securely deliver exact replica of printed document to customers inbox or show online 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.

I) How the message field is handled and what are the parameters for content?

Message Manager

This free account management tool is a custom-built web-based application that allows clients to control the messages that print on output. Clients can schedule the messages months or even years in advance, as well as set criteria to assign unique messages to different types of customers, or even to individual accounts. A PDF preview displays the message in the actual font that will be used.

Below you will find a list of all messages your company currently has pending:

File Type	Message Name	Message Type	Message Area	Start Date	End Date	Status	Test?	Message
STATEMENTS	Rate Change Notice	HTMLBox	HTMLBox	2013-01-01	2013-03-31	Active	No	Rate are...
STATEMENTS	Holiday Schedule	HTMLBox	HTMLBox	2013-12-01	2013-12-31	Active	No	Please not...
STATEMENTS	Fall Marketing Message	HTMLBox	HTMLBox	2013-10-01	2013-11-30	Active	No	This fall...
STATEMENTS	New Community Center	HTMLBox	HTMLBox	2013-08-01	2013-08-31	Active	No	Visit the...
STATEMENTS	Revised Business Hours	HTMLBox	HTMLBox	2012-08-01	2012-07-31	Active	No	Business h...

Add Message For: Please Select Add Message

File Type: STATEMENTS

Message Type: HTMLBox - HTMLBox

Message Name: Online BillPay Raffle

Start Date (YYYY-MM-DD): 2013 - 03 - 01 1 2 3

End Date (YYYY-MM-DD): 2013 - 04 - 30 1 2 3

Accounts: 1 (See Description Above):

Message:

Customers who are signed up for Online BillPay and have elected to go paperless will automatically be entered in a raffle. Enable paperless billing by Nov 14th to be eligible for the raffle. A customer will be selected at random and will win a \$400 gift card to Best Buy.

Test (Check this if this is a test message that should "NOT" be included on production jobs): ☐

Print

m) How would your firm handle project management to ensure that:

- **Deadlines are met**
- **Budgets are kept**
- **Regular updates are provided and effective communication is maintained throughout the project**
- **Excellent customer service is provided**

General:

InfoSend's offer reduces project risks and budget overruns as the incumbent provider for the scope of service presented in the RFP. InfoSend has been the provider of these services since 2011 and worked closely with the City of Aurora for a successful launch of the project as well as managed the change requests with continued, attentive Client Services support. InfoSend will continue to provide this unwavering support to the City of Aurora in maintaining the scope required and any enhancements brought forth.

Deadlines are met:

This project is live with InfoSend and currently maintained. Keeping the project with InfoSend drastically mitigates missing deadlines for onboarding the scope with another vendor and ensures continued uptime. However, InfoSend performs literally thousands of projects each year. These range from new client implementations to simple/complex current client change requests. Over the past 5 years, 7000+ projects have been tracked and InfoSend has achieved a 95% project on-time status. Some projects are put on hold/delayed by the client or the original due date may get changed due to scope changes that require more time.

InfoSend maintains project control threads within our CRM, project control charts per individual project related to approved Statements of Work, as well as project assignments and check lists. A derivative of the above mentioned project indications is a Monthly Project Status update for internal staff review and updates (shown below). The project updates share information about the client, project, link to the project in our CRM, status of project and whether it is on-time, delayed (and reason for delay), live date targets and any notes regarding the status.

Client Code	Client Name	Project Name	Industry	Type of Project	Additional Volume	Target RL	Status	Notes
44 QAT	Quality Adaptation	PHD Implementation	Other	n/a	n/a	n/a		
45 RLB	City of San Luis	SPDM - City of San Luis, W.L. Implementation	Utility	Implementation	3000	780	n/a	
46 S2T	Superior Court of CA - San Ber	VALMIO - SJC Trial in Assembly Software	Court	Conversion	n/a	780	n/a	
47 SCL	City of Santa Clara	SCL Platform - Tax Insurance Implementation	Tax	Implementation	4100/mo	780	n/a	
48 S94	City of Santa Valley	SAC - Software Conversion	Utility	Conversion	n/a	780	n/a	Conversion not scheduled until Summer 2018
49 SDC	Sierra Creek Water District	SGS - Software Conversion - PHD	Utility	Conversion	n/a	780	n/a	Discovery call will be held in August 2018
50 SUT	County of San Diego	SUT Platform - Tax Software	Tax	Implementation	800/year	780	n/a	Client has gone dark on this project
51 T2S	T2 Systems	PHD - PHD Implementation	Utility	Implementation	3000/mo	780	n/a	Client has gone dark on this project
52 T10	County of San Mateo	T10 - PHD Implementation	Tax	Implementation	780	780	n/a	Waiting for AMP to provide projected added value
53 TRL	Turkish Irrigation District	T10 - PHD Implementation	Utility	Conversion	n/a	780	n/a	Timeline go live in Q1 2020
54 UTC	Malibu, Inc. Survey	UTC - Assembly Tool Report Implementation	Utility	Implementation	n/a	780	n/a	AMP requested times for CDC
55 WVD	West Valley Water District	PHD Implementation	Utility	PHD	n/a	780	n/a	
56 YUB	City of Yuba City	PHD Implementation	Utility	PHD	n/a	780	n/a	
57 ULS	Lafayette Utilities Systems	PHD Implementation	Utility	Implementation	n/a	780	n/a	
58 PRO	City of Provo	PHD Implementation	Tax	Implementation	780	780	n/a	
59 PRO	City of Provo	PHD Implementation	Tax	Implementation	780	780	n/a	
60 CWN	Commercial Water & Energy Co.	PHD Implementation	Utility	Implementation	1500/mo	780	n/a	
61 DTH	Dallas Texas	PHD Implementation	Utility	Implementation	800/mo	780	n/a	
62 DMC	Duncan Substation, Inc.	PHD Implementation	Utility	Implementation	n/a	780	n/a	
63 HCV	Harris County WCID #50	PHD Implementation	Utility	Implementation	1000/mo	780	n/a	
64 PRO	City of Provo	PHD Implementation	Utility	Conversion	n/a	780	n/a	
65 SRA	City of Santa Ana	PHD Implementation	Utility	Conversion	n/a	780	n/a	
66 TAC	Turner Acceptance Corp	PHD Implementation	Financial	Implementation	1500/mo	780	n/a	
67 ULI	City of Ukiah	PHD Implementation	Utility	Implementation	1500/mo	780	n/a	
68 CCB	Cucamonga Valley Water District	PHD Implementation	Utility	Implementation	3000/mo	2/13/2018	On time	
69 RLB	City of Flagstaff	PHD Implementation	Utility	Implementation	300/mo	3/2/2018	On time	
70 BBL	City of San Bernardino Water District	PHD Implementation	Utility	Implementation	1500/mo	3/2/2018	On time	
71 ERL	Ericksen Living	PHD Implementation	Healthcare	Implementation	2000/mo	3/2/2018	On time	
72 BBL	City of San Bernardino Water District	PHD Implementation	Utility	Implementation	n/a	3/2/2018	On time	
73 BBL	City of San Bernardino Water District	PHD Implementation	Utility	Implementation	n/a	3/2/2018	On time	
74 PNA	Apple Valley Bandwidth Water	PHD Implementation	Utility	Conversion	n/a	3/2/2018	On time	
75 CCB	Cucamonga Valley Water District	PHD Implementation	Utility	Implementation	unknown	3/2/2018	On time	
76 CCB	Cucamonga Valley Water District	PHD Implementation	Utility	Implementation	unknown	3/2/2018	On time	
77 CCB	Cucamonga Valley Water District	PHD Implementation	Utility	Implementation	unknown	3/2/2018	On time	
78 CCB	Cucamonga Valley Water District	PHD Implementation	Utility	Implementation	unknown	3/2/2018	On time	
79 DWS	Landshire Water & Sewer	PHD Implementation	Utility	Implementation	2500/mo	3/2/2018	On time	
80 MOT	City of Modesto	PHD Implementation	Other	Implementation	n/a	3/15/2018	On time	
81 BAH	City of Banning	PHD Implementation	Utility	Implementation	15000	3/15/2018	On time	

Having said this, InfoSend is in constant communication with the Client for any specific project. Client and InfoSend are aware of the project status at all times. As mentioned elsewhere in this response, InfoSend provides a tightly controlled implementation and change management process that includes our Client Services

collecting requirements, documenting and getting approval on an SOW, executing as well as holding weekly status update meetings with the Client to be sure that milestones are being met for target dates. Also, Client Services works closely to modify the existing implementation plan based on any changes desired by the client.

Budgets are kept:

The current scope of work is already provided by InfoSend so there will be no additional costs incurred. InfoSend will only charge for services used in the contract or approved by the City. Any project revisions will be captured in a statement of work, approved by the City should change requests be necessary in the future. The Statement of Work will outline all deliverables and if any fees are associated with the change. This will ensure the City and InfoSend understand the budget and that it is kept.

Regular updates:

Updating clients on projects is a standard operating procedure for project changes. InfoSend's Client Services will work closely with the City on the cadence required by the City for any project, however the standard is weekly status updates.

Please note our Change Management methodology:

Client Application Change Management

InfoSend's Client Services team is experienced in assisting clients with change requests that range from quick document updates through complex conversions that affect the underlying data and complete document design. Throughout the life of the application, InfoSend's dedicated Account Manager will remain the point of contact, providing client-specific insight and knowledge to ensure change requests are handled with expertise and first hand experienced. InfoSend maintains a tightly controlled Client Application Change Management program to ensure accuracy, quality, and timeliness of changes to output.

InfoSend's manages changes to client applications with the following controls:

1. **Requirements Gather:** the client request is logged in the InfoSend internal CRM tool by the dedicated Account Manager. Required assets such as mockups and example data files are gathered from the client, if required, to ensure the scope is defined.
2. **Scoping and Statement of Work (SOW):** The Account Manager reviews the request internally and defines a scope with the assistance of the InfoSend IT programmer assigned to the project. Once a scope is determined, InfoSend will present the client with a Statement of Work (SOW), which will include the Professional Services hours (PS) and timeline to delivery. InfoSend's change request delivery times vary based on the scope.
*InfoSend does not bill for changes that require under 1 PS Hour
3. **Application Build, Testing, Tracking:** upon client approval of the SOW, the change request enters the InfoSend queue and works begins according to the timeline. The changes are built, approved with the following milestones:
 - o **Project Tracking:** Depending on the scope of the change request, a project tracking document may be utilized to ensure all scope items are monitored, reviewed and approved by the client.
 - o **Development Environment:** changes are made by the InfoSend programmer in a controlled, separated development environment, using code source control.
 - o **Sample Review and Approval:** InfoSend's dedicated Account Manager reviews samples, and if acceptable provides them for Client review, feedback and sign off. If a project tracking doc was utilized, all open scope items are reviewed individually with the client prior to approval.
4. **Deployment:** client approval is logged in the CRM tool, and the code deployment is scheduled. Code changes are checked in and deployment to production is performed by authorized personnel. For projects where output was completely redesigned, InfoSend's Account Manager is required to complete a First Live run review, and complete a Go Live checklist to ensure accuracy. At client discretion, InfoSend may also enable Sample Approval workflow for the client to review the first live run prior to release to customers.

Customer Service:

Customer Service is a key focus for InfoSend and we trust the City has experienced our desire to prioritize customer satisfaction through focused support. InfoSend has several approaches to managing client needs based on client interaction desires. 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 Client Services Support

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.

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:
 - Log, track & close support requests
 - View & update support requests
 - Access published documentation
 - Access available downloads
 - Download reports
 - View Job Tracking statistics
 - 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.

Response to Scope of Work

The contract with the current provider expires September 30, 2021. Awarded vendor must have the ability to begin implementation after award and be prepared to begin utility invoice production/distribution services by October 1, 2021.

InfoSend accepts this requirement. We have been providing data processing, printing, and mailing services to the City since 2011.

The selected contractor will provide all bill rendering services but not limited to:

1. Implementation services

The City of Aurora is currently live on InfoSend's print and mail platform. Should the City require program changes or a bill re-design, we will quote a Statement of Work prior to commencing work. This SOW will be specific to the program modification request and will include a detail of task assignments and management hours.

2. Providing invoices for testing by the lockbox service

InfoSend accepts this requirement. We have been providing data processing, printing, and mailing services to the City since 2011.

3. Producing all necessary stock and inventory

InfoSend Reliable Production and Materials

- **Standardized Environment:** InfoSend's standardization in production and materials provides reliability and cost effectiveness for clients with a diverse array of needs across countless industries.
- **Effective Paper Stock:** standard 24 lb. blank paper utilized to strike the right balance between cost and reliability.
- **Customized Perforation:** multiple perforation locations are supported to ensure lockbox compatibility.
- **High Speed Digital Printing:** printing using laser or inkjet technology: black, grayscale, black plus one or more spot colors, and full color printing are all supported.
- **Effective Envelope Stock:** standard and reliable outgoing #10 and return #9 envelopes predominantly manufactured and stocked by InfoSend, include strategically placed windows to allow client logos to be visible for the customer prior to opening, as well as tinting to ensure data privacy.
- **Computerized Mailpiece Inserting:** documents at InfoSend are tagged and tracked through the production environment, including mailpiece integrity software that ensures accurate insertion of printed page into the envelope prior to delivery to the USPS.
- **USPS Compliance and Automation:** all documents are presorted prior to induction to the mail stream to ensure the lowest possible postage rate. InfoSend's Anaheim and Downers Grove facilities are designated as a USPS Detached Mail Unit (DMU), meaning USPS personnel are onsite authorizing mail to head straight to regional sort centers and bypass the local office.

InfoSend Warehousing and Inventory Management

- Excess warehousing capacity in all locations, with 49,000 square feet of warehouse space in Anaheim alone.
- Warehouses optimally placed within facilities to ensure efficient and smooth print and mail production flow.
- Dedicated warehouse personnel on staff to manage inventory and enhance client support and notification.
- Strictly controlled intake procedure ensures all drop shipped or internally produced materials match expected quality and counts before storage.
- Inventory controls ensure that InfoSend staff manages client reorder points while monitoring inventory levels with daily, weekly and monthly counting cycles.

4. Formatting of the bill files

The City will continue to have access to InfoSend's Client Services department for any inquiries regarding data files or bill formatting. In addition, the City will have a Message Manager with the capability of adding/formatting ad-hoc messages for billing documents. We are happy to discuss more specific requirements if the City had something else in mind here.

5. Printing of the utility invoices

Printing

- **Job Priority:** Jobs are printed on an as-received basis, with jobs requiring the shortest turnaround time given priority. InfoSend is committed to meeting the agreed upon mail turnaround times for all clients simultaneously and is staffed and equipped accordingly.
- **Operator Controls:** Once a sample file batch has been approved for printing, files are sent to the print production queue. InfoSend's unique Central Print program monitors print jobs in the production department, prohibiting a job from being printed more than once, and provides operator controls including timestamps of printing time and other tracking metrics. InfoSend production staff with appropriate permissions are granted access to queued files.
- **Job Ticket:** A job ticket is attached during processing to each production run. A job ticket contains information such as printing specifications, form type, envelope options, and whether an insert should accompany the file. The job ticket is printed in our production department and remains with a job until it is released to the USPS for mailing.

6. Distribution of the utility invoices

Mailing and Electronic Distribution

- **Mailing Department:** once a job has gone through Quality Control, it is released to the printing department for fulfillment. All printed pages are matched to the correct materials per the Job Ticket and inserted into the envelope for mailing. Mail that has been inserted is then delivered to the USPS with the appropriate postal paperwork for the USPS to validate prior to induction. Upon delivery to the USPS, either at the onsite Detached Mail Unit (DMU) or local distribution center, the job batch is scanned as completed by an InfoSend operator.
- **Electronic, Multi-Channel Distribution:** upon completion of the job batch, InfoSend's CCM platform begins the electronic distribution of customer records to the InfoSend archive, hosted eBusiness system, back to the client, or other third party distribution networks.

7. Utility bill modifications

InfoSend can produce the City's bill in the current format. Should the City decide to make small bill modifications, currently InfoSend provides this at no cost to the City. Should the City decide to make major modifications, the InfoSend team can provide extensive experience on bill redesign recommendations and support.

8. All the necessary training (i.e., file transfers, navigating website, etc.)

Samples, Parallel Testing, and Training

During the last phase of the implementation, output and application web access is provided to clients for User Acceptance Testing (UAT). Once the application build is validated and accepted by the client, the application is put into Parallel Testing mode. During this time clients are encouraged to transfer copies of live data to InfoSend to be automatically processed and output for review, simulating go-live. Clients check the web application and output to ensure that it is satisfactory and any requested revisions will be completed before go-live. Any payment related applications are tested to ensure payment deposits are received and reconciled. Clients are also trained on how to use InfoSend tools and reporting to support the application at this time.

The hour-long, web-based training covers:

- File uploads
- Sample review and approval
- Managing document messages and insert requests
- Accessing archived reports
- Managing User Permissions
- Performing research and support for customer activity
- Payment reconciliation (for payment applications)
- Submitting, viewing and closing support requests

9. Follow up support

InfoSend Client Services Support

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.

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:
 - Log, track & close support requests
 - View & update support requests
 - Access published documentation
 - Access available downloads
 - Download reports
 - View Job Tracking statistics
 - 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's 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

10. Printing of inserts and bill messages when requested

Message Manager

This free account management tool is a custom-built web-based application that allows clients to control the messages that print on output. Clients can schedule the messages months or even years in advance, as well as set criteria to assign unique messages to different types of customers, or even to individual accounts. A PDF preview displays the message in the actual font that will be used.

Below you will find a list of all messages your company currently has pending:

File Type	Message Name	Message Type	Message Area	Start Date	End Date	Status	Test?	Message
STATEMENTS	Rate Change Notice	HTMLMessage	HTMLBox	2013-01-01	2013-03-31	Active	No	Rate are ...
STATEMENTS	Holiday Schedule	HTMLMessage	HTMLBox	2013-12-01	2013-12-31	Active	No	Please not ...
STATEMENTS	Fall Marketing Message	HTMLMessage	HTMLBox	2012-10-01	2012-11-30	Active	No	This fall ...
STATEMENTS	New Community Center	HTMLMessage	HTMLBox	2012-08-01	2012-08-30	Active	No	Visit the ...
STATEMENTS	Revised Business Hours	HTMLMessage	HTMLBox	2012-06-01	2012-07-31	Active	No	Business h ...

Add Message For:

File Type: STATEMENTS

Message Type: HTMLMessage - HTMLBox

Message Name: Online BillPay Extra

Start Date (YYYY-MM-DD): 2013 1 61 ☐

End Date (YYYY-MM-DD): 2013 1 64 30 ☐

Accounts:

Message:

Customers who are signed up for Online BillPay will have elected to get statements will automatically be entered in a raffle. Example: statements billing by May 14th to be eligible for the raffle. A customer will be selected at random and will win a \$400 gift card to Best Buy.

Test (Check this if this is a test message that should "NOT" be included on production jobs): ☐

Insert Management

The Insert Management tool is designed for clients to control what additional materials will be included with the standard output. Clients may request InfoSend Produced Inserts as well as schedule drop-shipped inserts from within the tool. The tool also provides the history of all Insert requests for client reference.

Here is a list of the last 50 insert requests made by your organization.

Insert Name	Run Date	Request Submitted On	Insert Status	Programs	Insert Type	Details
June 2012 EU Today Newsletter	2012-05-25 to 2012-06-25	2012-05-18 16:04:21	Insert is Approved and Active	INF	Drop Shipped	View
May 2012 Electric Dispatch	2012-04-25 to 2012-05-24	2012-04-30 07:27:32	Insert is Approved and Active	INF	Drop Shipped	View
May 2012 EU Insert	2012-05-03 to 2012-06-01	2012-04-04 12:55:08	Insert is Approved and Active	INF	InfoSend Produced	View

The Insert Management tool pre-populates forms with the user's information:



Insert Request

The Insert Request is used for scheduling and quoting insert requests. InfoSend requires that an Insert Request be completed for every insert. Please familiarize yourself with our Insert Guidelines Document before requesting your inserts.

Please take a moment to ensure that the contact information below is correct.

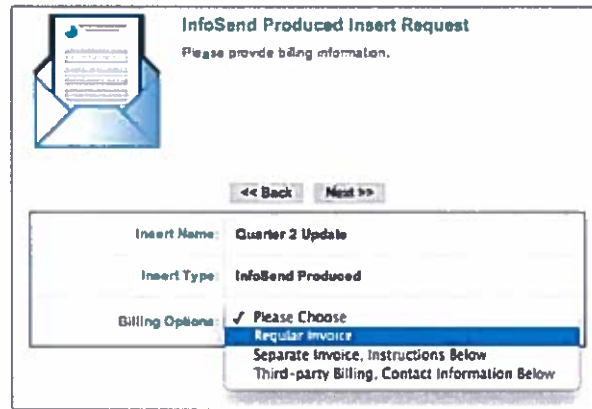
Organization Name:	Demo Company
User Name:	Joe Res
E-mail:	je@client.com
Title/Department:	Finance
Street Address:	123 Main Street
City:	Sample City
State & Zip Code:	California 92107
Phone Number:	(800) 955 - 8333
After Hours Contact:	Joe Res - (800) 955-8333
<input type="checkbox"/> Same as above	

This tool asks users to input an insert name as well as select the type of insert. InfoSend Produced Inserts will be printed at InfoSend's facility or a local offset printing partner, Drop Shipped inserts must be sent to InfoSend, and Online Billing inserts are electronically presented:

For InfoSend Produced inserts, users are able to use the automated Insert Management tool to select insert printing specifications. This form also allows users to upload artwork files for review by InfoSend's team:

The tool allows users to designate the job types inserts should be included with, as well as specify the quantity and run dates. InfoSend also enables users to utilize selective inserting. Selective inserting is a dynamic technology that specifies which inserts will be included for certain account types:

Clients can also designate insert billing options on the next screen. Once the insert request has been completed, users will receive an email confirmation detailing the request. Users must authorize the confirmation before an insert request is activated.



The screenshot shows a web form titled "InfoSend Produced Insert Request" with the instruction "Please provide billing information." The form includes a "Back" and "Next" button pair. Below these are three input fields: "Insert Name" with the value "Quarter 2 Update", "Insert Type" with the value "InfoSend Produced", and "Billing Options" with a dropdown menu. The dropdown menu is open, showing four options: "Please Choose" (selected with a checkmark), "Regular Invoice", "Separate Invoice, Instructions Below", and "Third-party Billing, Contact Information Below".

Field	Value
Insert Name	Quarter 2 Update
Insert Type	InfoSend Produced
Billing Options	<ul style="list-style-type: none">✓ Please ChooseRegular InvoiceSeparate Invoice, Instructions BelowThird-party Billing, Contact Information Below

4. Resumes for Key Personnel

Provide a brief description of all key personnel to be involved and their relationship to the services to be provided.

InfoSend is the City's current vendor for print and mail, and therefore we don't require a project manager or project engineer to continue providing services to the City. That said, InfoSend's current support is managed by the departments and contacts provided below:

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. Key InfoSend staff are as follows:

Executive Management and Sales:

InfoSend designated Contract Administrator: Russ Rezai, President

InfoSend designated Contract Manager: Matt Schmidt, COO

InfoSend Sales contact: Marty Bielecki, Sales Executive and Tom Bleers, Territory Sales Manager

InfoSend Client Services contact: Josue Martinez, Head of Client Services

Delivery Team:

- Executive Management and Sales Team: will serve as City of Aurora's 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.
- IT team: will provide back-end support for City of Aurora's jobs. IT works in conjunction with InfoSend Client Services during any improvement projects and actively monitors program functions after go-live. IT personnel report to Vedat Aral, Director of IT.

a) Please describe the customer service team/account specialist that would be assigned to this project.

InfoSend is the City of Aurora's current vendor for print and mail, and therefore we don't require a project manager or project engineer to continue providing services to the Agency.

b) Complete staff bios should be provided as part of an appendix to the proposal.

Staff bios have been added to the appendix of this response.

c) Are any of these personnel contract or outsourced employees? If so, please identify who they are.

InfoSend does not require the use of contractors or sub-consultants to continue supporting the City of Aurora as a client. Our turnkey Data Processing Print and Mail solution is performed in its entirety by InfoSend with no portion of the work being subcontracted. The inherent advantages are threefold; first, only one phone call to make for any and all questions; second, InfoSend is entirely responsible for all phases of the work; and third, all contractual responsibility rests solely with InfoSend.

5. Timing

a) Approximately how long does your firm project it would take to complete the implementation?

Not applicable. City of Aurora is currently live on InfoSend's print and mail platform. Should the City of Aurora require program changes or a bill re-design, we will quote a Statement of Work prior to commencing work. This SOW will be specific to the program modification request and will include a detail of task assignments and management hours.

b) If awarded the project, what is the time frame for your resources to be available?

City of Aurora is currently live on InfoSend's print and mail platform. The typical new client implementation is 10-12 weeks which is not applicable here.

6. Resource Requirements

The selected vendor must work effectively with the City of Aurora. Please address the amount of time and resources you will require of various City of Aurora personnel to implement the system.

City of Aurora is currently live on InfoSend's print and mail platform. No resources would be needed since programs and systems has been implemented.

7. Municipal/Government Agency References (minimum of three)

Please provide at least three references from clients for whom you provide utility invoicing and distribution services of similar size and scope, preferably governmental entities that operate utilities. References should include company name, a contact name and phone number.

InfoSend is proud to have supported the City of Aurora as its print and mail vendor for 10 years. We think that your experience working with us, our capabilities, and attentive Client Services department, is the best testament to the quality of work we perform. We have provided a list of references below featuring similar utility bill print/mail work provided, including utilities using Systems & Software data similar to yours as well as utilities local to your area.

InfoSend supports over 600 utility clients nationwide from our 4 production facilities.

City of Joliet, IL	815.724.3900
150 West Jefferson Street	James Ghedotte, Director of Finance
Joliet, IL 60432	jghedotte@jolietcity.com
<ul style="list-style-type: none">• Contracted Since: 2010• Billing System: Tyler - Munis• Volume: 50,000 per month• InfoSend Products Used: Data Processing Print and Mail, Email eBilling <p>InfoSend currently produces approximately 45,000 bills/notices per month for The City of Joliet. The City also uses Email eBilling services through InfoSend.</p>	

City of Elgin, IL	847.931.5631
10 Dexter Court	Pamela Camacho, Citizen Services Supervisor
Elgin, IL 60120	CAMACHO_P@cityofelgin.org
<ul style="list-style-type: none">• Contracted Since: 2011• Billing System: Monexa• Volume: Approximately 30,000 Mail Pieces Monthly• InfoSend Products Used: Data Processing Print and Mail, Premium E-Billing <p>InfoSend currently produces approximately 30,000 bills per month on average for the City of Elgin. Elgin was on-boarded in 2011 after an RFP win, and retained InfoSend as a vendor following another RFP with in 2015. InfoSend has Produces the City's Statements and Shut off Notices.</p>	

Village of Downers Grove	630.434.5563
801 Burlington Ave	Robin Lahey
Downers Grove, IL 60515	rlahey@downers.us
<ul style="list-style-type: none">• Contracted Since: 2009• Billing System: Tyler-Eden• Volume: Approximately 8,000 Mail Pieces Monthly• InfoSend Products Used: Data Processing Print and Mail, Basic eBill	

InfoSend currently produces approximately 8,000 bills per month on average for the Village of Downers Grove, transmitted from its Tyler-Eden billing system. InfoSend has a production facility in the Village, so it was and is a good match to provide services.

8. General

Is there anything else you would like to include about your firm or capabilities that the City should consider in its evaluation process?

InfoSend is honored to be the current vendor of choice for the City of Aurora since 2011. We will continually strive to provide the best customer experience and service to the City of Aurora. InfoSend has provided everything within this response regarding our print and mail and client services/experience capabilities.

Required Forms

Proposer's Checklist

CITY OF AURORA, ILLINOIS REQUEST FOR PROPOSAL 21-19

UTILITY INVOICE PRODUCTION/DISTRIBUTION SERVICES FOR THE WATER BILLING DIVISION

PROPOSAL SUBMITTAL CHECKLIST

Each Proposal must be placed in an envelope, sealed, and clearly marked on the outside: "21-19 Utility Invoice Production/Distribution Services." In order to be considered responsive, the proposer must submit all of the following items in their sealed envelope:

- ☒ Proposal Content (Appendix A, Section 4)
- ☒ Proposer's Certification (Page 1)
- ☒ Proposer's Tax Certification (Page 2)
- ☒ Contact Information (Appendix B)
- ☒ Vendor Application (Appendix E)

Each Price Proposal must be placed in a separate, sealed envelope, and clearly marked on the outside: "Price Proposal – RFP 21-19 Utility Invoice Production/Distribution Services."

- ☒ Proposal Form (Appendix C)

PROPOSER'S CERTIFICATION

I/We hereby certify that:

- A. A complete set of proposal papers, as intended, has been received, and that I/We will abide by the contents and/or information received and/or contained herein.
- B. I/We have not entered into any collusion or other unethical practices with any person, firm, or employee of the City which would in any way be construed as unethical business practice.
- C. I/We have adopted a written sexual harassment policy which is in accordance with the requirements of Federal, State and local laws, regulations and policies and further certify that I/We are also in compliance with all equal employment practice requirements contained in Public Act 87-1257 (effective July 1, 1993) and 775 ILCS 5/2-105 (A).
- D. I/We operate a drug free environment and drugs are not allowed in the workplace or satellite locations as well as City of Aurora sites in accordance with the Drug Free Workplace Act of January, 1992.
- E. The Proposer is not barred from bidding on the Project, or entering into this Proposal as a result of a violation of either Section 33E-3 or 33E-4 of the Illinois Criminal Code, or any similar offense of "bid rigging" or "bid rotating" of any state or the United States.
- F. I/We will abide by all other Federal, State and local codes, rules, regulations, ordinances and statutes.

COMPANY NAME InfoSend, Inc.

ADDRESS 4240 E La Palma Ave

CITY/STATE/ZIP CODE Anaheim, CA 92807

NAME OF CORPORATE/COMPANY OFFICIAL Russ Rezai
PLEASE TYPE OR PRINT CLEARLY

TITLE President

AUTHORIZED OFFICIAL SIGNATURE 

DATE 4/2/21

TELEPHONE (714) 993-2690

FAX No. (714) 993-1306

Subscribed and Sworn to
Before me this ____ day
of _____, 2021

Notary Public

See attached

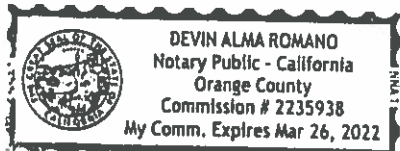
A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of Orange

Subscribed and sworn to (or affirmed) before me on this 2nd
day of April, 2021, by Rusteen Rezaei

proved to me on the basis of satisfactory evidence to be the
person(s) who appeared before me.



(Seal)

Signature

Devin Alma Romano

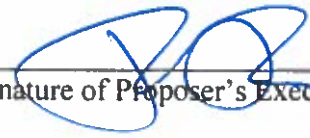
STATE OF ILLINOIS)
) ss.
County of Kane)

PROPOSER'S TAX CERTIFICATION

(PROPOSER'S EXECUTING OFFICER), being first duly sworn on oath, deposes and states that all statements made herein are made on behalf of the PROPOSER, that this despondent is authorized to make them and that the statements contained herein are true and correct.

Proposer deposes, states and certifies that Proposer is not barred from bidding with any unit of local government in the State of Illinois as result of a delinquency in payment of any tax administered by the Illinois Department of Revenue unless Proposer is contesting, in accordance with the procedures established by the appropriate statute, its liability for the tax or the amount of the tax, all as provided for in accordance with 65 ILCS 5/11-42.1-1.

DATED this 2 day of April, 2021.

By 
(Signature of Proposer's Executing Officer)
Russ Rezai
(Print name of Proposer's Executing Officer)
President
(Title)

ATTEST/WITNESS:

By _____
Title _____

Subscribed and sworn to before me this
_____ day of _____, 2021.

Notary Public
(SEAL)

See attached

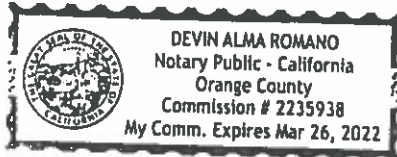
A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of Orange

Subscribed and sworn to (or affirmed) before me on this 2nd
day of April, 2021, by Rusteen Rezaei

proved to me on the basis of satisfactory evidence to be the
person(s) who appeared before me.



(Seal)

Signature

Devin Alma Romano

CITY OF AURORA, ILLINOIS
REQUEST FOR PROPOSAL 21-19

UTILITY INVOICE PRODUCTION/DISTRIBUTION SERVICES FOR THE WATER
BILLING DIVISION

CONTACT INFORMATION

Vendor shall provide the following contact information assigned to service the City of Aurora account.

Customer Service/General Information: Ph: (800) 955-9330

To place an order:

Name: Tom Bleers
Ph: (312) 720-0459 Fax: (630) 932-7308
E-mail: tom.b@infosend.com

Billing & Invoicing question:

Name: Lena Martinez
Ph: (714) 993-2690 ext 370 Fax: (714) 993-1306
E-mail: lena.m@infosend.com

Questions:

Name: Tom Bleers
Ph: (312) 720-0459 Fax: (630) 932-7308
E-mail: tom.b@infosend.com

Proposer's Name: InfoSend, Inc.

Signature & Date:  4/2/21

**PURCHASING DIVISION**44 East Downer Place
Aurora, Illinois 60507

(630) 256-3550 (phone)

(630) 256-3559 (fax)

VENDOR APPLICATION FORMPlease fill in all spaces, Insert "NA" in blocks not applicable.
TYPE OR PRINT ALL ENTRIES.Date: 04.02.2021

COMPANY InfoSend, Inc.		HOW LONG IN PRESENT BUSINESS? 24 Years	
ADDRESS 4240 E La Palma Ave		CITY Anaheim	STATE CA ZIP 92807
CONTACT PERSON Tom Bleers		PHONE AND EXTENSION 312.720.0459	FAX NUMBER 630.932.7308
EMAIL ADDRESS tom.b@infosend.com			
TYPE OF ORGANIZATION (Check Applicable) <input type="checkbox"/> Individual <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Corporation		If Incorporated, indicate in which State California	
Year Established: 1996		Number of Employees working in Aurora: 0	
CATEGORY (Check below the category which applies to the applicant) <input checked="" type="checkbox"/> (A) Manufacturer or Producer <input type="checkbox"/> (C) Retailer <input type="checkbox"/> (E) Distributor <input type="checkbox"/> (B) Wholesaler <input type="checkbox"/> (D) Manufacturer's Agent <input type="checkbox"/> (F) Service Establishment			
TYPE OF PRODUCT/SERVICE REQUESTING TO BID ON: RFP 21-19 Utility Invoice Production/Distribution Services for the Water Billing Division			
NAMES OF OFFICERS, MEMBERS OR OWNERS OF CONCERN, PARTNERSHIP, ETC.			
(A) PRESIDENT Russ Rezai		(B) VICE PRESIDENT	
(C) SECRETARY Roxana Weil		(D) TREASURER	
(E) OWNERS OR PARTNERS Mahmood Rezai, Russ Rezai			
(F) IF (A) THRU (E) EMPLOYED BY STATE OR LOCAL GOVERNMENT STATE UNIT OF GOVERNMENT			
TAXPAYER'S I.D. NO. FEIN <u>33-0748516</u> or S.S. No. _____		INSURANCE INFORMATION (Check Applicable) LIABILITY INSURANCE: \$1,000,000 \$2,000,000 \$5,000,000 Other Minimum acceptable limits are \$1M per occurrence, \$2M general aggregate (some projects/bids may also require higher limits and/or excess liability coverage). It is required that the City of Aurora be named as a primary, non-contributory additional insured. Insurance Co. <u>Marsh & McLennan Agency LLC</u>	
Completed W-9 Form required		Attach a copy of your current certificate of insurance	
PERSON(S) AUTHORIZED TO SIGN QUOTES, PROPOSALS, BIDS AND CONTRACTS:			
NAME		OFFICIAL CAPACITY	
Russ Rezai		President	

MINORITY/WOMEN/DISABLED BUSINESS

The City of Aurora has established a Procurement Development Program designed to encourage city procurement from businesses owned by minorities, women, and disabled persons (MWDP).

Please enclose a current copy of your minority status certification from one of the below agencies with this application to register as a minority group member.

- Illinois Unified Certification Program
- Illinois Department of Central Management Services (CMS) Business Enterprise Program
- Illinois Department of Transportation
- Women's Business Development Center

MINORITY GROUP MEMBER Please check the applicable box(es).

NOTE: Do not complete this section unless you have attached a certification from one of the listed agencies.

Minority Business Enterprise

Women Business Enterprise

Disabled Business Enterprise

The City of Aurora also recognizes procurement actions with self-declared (non-certified) MWDP businesses. Please check the applicable box below.

- ☐ African American ☐ Hispanic American ☐ Native American ☐ Asian-Pacific American
- ☐ Women-Owned ☐ Disabled

References: Please provide name, address and phone number of references.

1. Not Applicable
2. _____
3. _____
4. _____
5. _____


Signature of Person Authorized to Sign this Application

Russ Rezai, President
Name and Title of Person Signing (Type or Print)

USE BY CITY OF AURORA ONLY

VENDOR NUMBER:	APPROVED BY:	DATE:
COMMODITY CODE:	MINORITY STATUS:	

**Request for Taxpayer
Identification Number and Certification**

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

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

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
INFOSEND, INC.

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

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☒ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should 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 FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
4240 E. LA PALMA AVE.

6 City, state, and ZIP code
ANAHEIM CA 92807-1816

7 List account number(s) here (optional)

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. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

3 3 - 0 7 4 8 5 1 6

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 ► *[Signature]* Date ► **04/02/2021**

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.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Client#: 581763

INFOSENDI

ACORD**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

2/04/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Marsh & McLennan Agency LLC Marsh & McLennan Ins. Agency LLC 1 Polaris Way #300 Aliso Viejo, CA 92656	CONTACT NAME: Rocio Gutierrez	
	PHONE (A/C, No, Ext): 949 900-1780	FAX (A/C, No):
INSURED InfoSend, Inc. 4240 E La Palma Avenue Anaheim, CA 92807	E-MAIL ADDRESS: rocio.gutierrez@marshmma.com	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: Federal Insurance Company	NAIC #: 20281
	INSURER B: Compwest Insurance Company	12177
	INSURER C: Underwriters at Lloyd's London	555555
	INSURER D:	
INSURER E:		
INSURER F:		

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR	WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GENTL AGGREGATE LIMIT APPLIES PER <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER			36031149	02/01/2021	02/01/2022	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COM/OP AGG \$Included \$
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY			73587120	02/01/2021	02/01/2022	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			79896856	02/01/2021	02/01/2022	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	WCV5504862/CA-OR WCV6217250/TX-FL-IL	02/01/2021 02/01/2021	02/01/2022 02/01/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E L EACH ACCIDENT \$1,000,000 E L DISEASE - EA EMPLOYEE \$1,000,000 E L DISEASE - POLICY LIMIT \$1,000,000
C	*Prof Liab /Cyber			TRICE01496	02/01/2021	02/01/2022	\$5,000,000 Agg. /Claim
C	*Retro 12/01/06						\$25,000 Retention
A	Crime			68054862	02/01/2021	02/01/2022	\$300,000 /\$5,000 Ret.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Evidence of Coverage

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Coverage

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Cory Fricker

© 1988-2015 ACORD CORPORATION. All rights reserved.

ACORD 25 (2016/03) 1 of 1
#S7027777/M7013059

The ACORD name and logo are registered marks of ACORD

WOJKL

Appendix

Name	Russ Rezai
Experience	<p>InfoSend, Inc. Anaheim, CA (2016 – present) President</p> <ul style="list-style-type: none"> • Responsible for growing the company while improving quality level • Reports to the Chief Executive Officer • Leads and guides other executives • Maintains awareness of both the external and internal competitive landscape, opportunities for expansion, new industry developments and standards • Managed sales and business development <p>InfoSend, Inc. Anaheim then Fullerton, CA (2008 – 2016) Chief Operating Officer</p> <ul style="list-style-type: none"> • Managed day-to-day operations • Created formal Sales Department by selecting VP of Sales and transitioning sales management to him • Works with each department head to ensure company manages growth properly and scales production and human resource capacity • Regularly meets with VP of Sales, Director of Product Development and Direct of Client Services to ensure that the company's product and service offerings and service quality match business development plans and quality goals • Involved with the creation of the facilities in IL and TX and the selection and training of the managers for these locations <p>InfoSend, Inc. Fullerton, CA (2001 - 2008) VP of Development</p> <ul style="list-style-type: none"> • Managed research and development and selected the manager for IT • Creation of eBusiness Services department • New product and service development and deployment – including eBusiness Services • Creation of variable data digital color printing department • Created the Client Serviced Department and selected the manager for the department • Managed sales and business development <p>InfoSend, Inc. Anaheim then Fullerton, CA (1996 - 2001) Company Co-Founder</p> <ul style="list-style-type: none"> • Supported in development of new company in 1996 • Laid groundwork for future IT development between 1996 and 1997 • Began research into Electronic Bill Presentment and Payment Services • Stayed active part-time with company while studying at UC Santa Barbara
Education	BA, 2001 Business Economics - University of California, Santa Barbara

Name	Matt Schmidt
Experience	<p>InfoSend, Inc. Anaheim, CA (2007 – present) Chief Operating Officer</p> <ul style="list-style-type: none"> • 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 <p>InfoSend, Inc. Anaheim, CA Director, Client Services</p> <ul style="list-style-type: none"> • 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

	<p>continuous improvement.</p> <ul style="list-style-type: none"> • Work with executive management to develop and evaluate long-term strategies to achieve organizational goals.
Education	<p>MBA - University of California, Irvine BA - California State University, Chico</p>

Name	Josue Martinez
Experience	<p>InfoSend, Inc. Anaheim, CA (2016 – present) Director, Client Services</p> <ul style="list-style-type: none"> • 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 <p>InfoSend, Inc. Anaheim, CA (2000 – 2016) Senior Project Manager</p> <ul style="list-style-type: none"> • 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	<p>BA, Business Administration concentrating in Information Systems, California State University Fullerton.</p> <p>Proficient in Website/Forms Design using Following Applications/Languages: HTML, Crystal Reports, Adobe Illustrator, Visual Basic and MS Visual FoxPro</p>

Name	Vedat Aral
Experience	<p>InfoSend, Inc. Anaheim, CA (2004 – present) Director, I.T.</p> <ul style="list-style-type: none"> • Manages research and development • New product and service development and deployment – including Data Processing Print and Mail, and eBusiness Services <p>Gourmet Shuttle Huntington Beach, CA (2002 – 2003) Software Engineer</p> <p>Denge Bilisim Istanbul, Turkey (1994 – 2001) Owner, Software Engineer</p> <p>Halici Bilgi Islem Ankara, Turkey (1991 – 1994) Software Engineer</p>
Education	<p>MFA, Cinema & TV 1997, Marmara University – Istanbul Turkey BS, Computer Science & Engineering 1991, Hacettepe University – Ankara Turkey</p> <p>Proficient in Website/Forms Design using Following Applications/Languages: Mainframe, IBM S/36-AS/400, K-Series COBOL, RPG, Visual Basic, Visual FoxPro, Delphi, C#, ASP.NET SABRE, HDLC, X.25, Mercator, EDIHTML, Crystal Reports, Adobe Illustrator</p>