

Proposed Definition of Mail Fulfillment Services

Mail Fulfillment Services is work that occurs at the Preferred Source site and includes one or more of the below identified tasks:

- Production of documents received from a customer in either paper or electronic format which may require variable data (text only).
- The documents produced by the Preferred Source via digital printing must meet the following requirements:
 - Everything printed by the Preferred Source **MUST** be mailed to an identified recipient;
 - Documents printed shall not be larger than 11" x 17";
 - No coated paper;
 - Variable content limited to text only (no images or graphic designs);
 - No static digital printing of the documents on the List of Excluded Documents (non-variable data);
 - Documents printed shall only be bound by a single stapled corner;
 - Documents may be produced in black & white or color, as required by the customer;
 - Color can be used for logo and enhancing type but not for four-color images;
 - Documents may be produced only by a Preferred Source and **not** by a corporate partner;
 - The types of documents that **may be printed** as part of a Mail Fulfillment Services contract are limited to: letters, notices, statements, invoices/bills, postcards, flyers, brochures, announcements, certificates, order forms, newsletters, and similar documents that are personally addressed to the recipient and not being printed in bulk for stock purposes or to be shipped to the customer in bulk;
 - Documents printed **may not be** on the List of Excluded Documents set out below; and
 - If the documents to be printed by the Preferred Source **do not meet** the above requirements, then the contract **may not be awarded** as a preferred source contract.
- Folding, inserting, addressing, tabbing, gluing, sorting, tying and bagging or trayng documents, weighing and spraying and metering mail;
- Delivering mail to post office, courier, or customer;
- Picking-up, time stamping, opening, reading, pre-sorting, sorting, routing and delivering inbound and outbound postal and interoffice mail;
- Handling and processing all mail, any category or class, and performing inter-facility mail runs;
- Keeping necessary records and completed forms, such as return receipts on certified mailings; and

- Post-mailing services, including, but not limited to, scanning and securely shredding returned undeliverable mail, data scrubbing, receiving corrected addresses, processing through National Change of Address (NCOA), creating a new mail merge, recreating PDF files, reprocessing mailings within 10 days, and updating mailing lists.

List of Excluded Documents

Ad Slicks	Non-personalized Brochures
Badges	Non-personalized Certificates
Binder Covers	Non-personalized Flyers
Binder Inserts	Non-personalized Newsletters
Booklets	Non-personalized Order forms
Bookmarks	Non-personalized Pamphlets
Bound Annual Reports	Non-personalized Postcards
Business Cards	Note Cards
Calendars	Note Pads
Catalogs	Perfect Bound Books
Carbonless Forms	Periodicals
Checks	Placemats
Comb Bound Books or Manuals	Plastic Spiral Bound Books
Dimensional Products	Posters
Document Covers	Presentation Folders
Donor Cards/Inserts	Rack Cards
Election Ballots	Saddle-Stitched Books
Food Menus	Sell Sheets
Greeting Cards	Staggered Inserts
Hang Tags	Stationery Envelopes
Labels (except address labels)	Stationery Letterhead
Magnets	Stationery Packages
Maps	Stickers
Non-personalized Announcements	Wire-o-bound Books or Manuals
Non-personalized Applications	
Every Door Direct Mail (EDDM) items and sizes approved and any changes made to EDDM sizes and approved items	

Approval Conditions for Mail Fulfillment Services

To provide an opportunity for the State Procurement Council to fully evaluate the effect of this preferred source offering on NYS businesses and Preferred Sources, the approval of Mail Fulfillment Services, including the electronic delivery and digital printing of documents as a preferred source offering, is provisionally effective until at least the spring 2018 meeting of the Council (or the next subsequent meeting if no spring meeting is held), at which time the Council shall decide whether to (i) add Mail Fulfillment Services permanently to the List of Preferred Source Offerings (the "List"), (ii) eliminate Mail Fulfillment Services from the List, or (iii) extend the provisional effectiveness of Mail Fulfillment Services for further study.

To assist in the evaluation of this service offering, NYSID shall present at each Council meeting from September 2016 until the end of this provisional period a report showing the following information for each Mail Fulfillment Services contract:

Name of procuring agency

Name of Preferred Source

Date of contract and term of contract, if applicable

Brief description of contract scope

Status of contract (e.g., completed, 50% complete)

Value of contract

Number and type of documents digitally printed

Total labor hours

Total labor hours dedicated to digital printing

Percentage of contract labor hours dedicated to digital printing

Labor ratio of disabled to non-disabled workers on contract

Use of corporate partners for the non-printing component of the preferred source

The provisional nature of the approval of Mail Fulfillment Services shall not preclude the Council from modifying the definition of Mail Fulfillment Services at any time upon the request of any member of the Council or on its own motion. In the event that Mail Fulfillment Services is eliminated from the List or the definition is modified, such elimination or modification shall in no way affect the validity of any contract for Mail Fulfillment Services entered into prior to the date of such elimination or modification.