

## Proposed Definition of Mail Fulfillment Services

**Mail Fulfillment Services** is work that occurs at the not-for-profit Preferred Source site and includes the production of documents received from a customer in either paper or electronic format which may require variable data (text only) and one or more of the below identified tasks:

- 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.

Documents can be produced only in conjunction with one or more of the above identified tasks. 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.

### **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	

#### **NOTES:**

- 1) The definition of Mail Fulfillment Services allows Preferred Members to temporarily move Mail Fulfillment production to another site to satisfy a Purchasing Agency's need for continuity of Mail Fulfillment Services in the event of a disaster to meet a Purchasing Agency's form, function, and utility as defined in its scope of work. When required by the Purchasing Agency, members may shift production on a non-permanent basis to another site to ensure functionality of the disaster recovery

site. All work at the disaster recovery site must meet required disabled labor ratios. In addition, the Preferred Member may not enter into an agreement with a for-profit entity functioning as a corporate partner or subcontractor to establish or operate a disaster recovery site, although equipment and the disaster recovery site may be leased or rented from a for-profit entity.

- 2) To provide an opportunity for the State Procurement Council to fully evaluate the effect of this service on NYS businesses and Preferred Sources, this definition is provisionally added to the List of Preferred Source Service Offerings until the third meeting of the Council taking place in 2020, 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. During the provisional approval period, the Council may also, upon an affirmative vote on a motion, modify or eliminate the definition of Mail Fulfillment Services.