



**COLLIN COUNTY**

**TAX STATEMENT PREPARATION  
AND MAILING SERVICE**

**RFP 2017-202**

**Courtney Wilkerson  
Jack Hatchell Administration Building  
2300 Bloomdale Road, Ste. 3160  
McKinney, TX 75071**

**(P) 972-548-4113 (F) 972-548-4694  
[cwilkerson@collincountytexas.gov](mailto:cwilkerson@collincountytexas.gov)**

Collin County exclusively uses IonWave Technologies, Inc. ([Collin County eBid](#)) for the notification and dissemination of all solicitations. The receipt of solicitations through any other means may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid/proposal non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other means.

## LEGAL NOTICE

By order of the Commissioners' Court of Collin County, Texas, sealed proposals will be received by the Purchasing Agent, 2300 Bloomdale, Suite 3160, McKinney, TX 75071, until **2:00 P.M., Thursday, May 25, 2017**, for Request for Proposal **Tax Statement Preparation and Mailing Services (RFP No. 2017-202)**. Proposers shall use unit pricing. Funds for payment have been provided through the Collin County budget approved by the Commissioner's Court for this fiscal year only. Proposers may obtain detailed specifications and other documents at Office of the Purchasing Agent: Collin County Administration Building, 2300 Bloomdale, Suite 3160, McKinney, TX 75071, 972-548-4165, or by going to: <http://collincountytexas.ionwave.net>. Sealed proposals will be opened on **Thursday, May 25, 2017 at 2:00 P.M.** by the Purchasing Agent, 2300 Bloomdale, Suite 3160, McKinney, TX 75071. The Commissioners' Court reserves the right to reject any and all proposals.

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<b>ATTENTION:</b>	<b>CLASSIFIEDS</b>
<b>BILL TO:</b>	<b>ACCOUNT NO 06100315-000</b>
	<b>COMMISSIONER'S COURT</b>

NOTICE TO PUBLISHERS: Please publish in your issue on **Thursday, May 4, 2017, and Thursday, May 11, 2017**. A copy of this notice and the publisher's affidavit must accompany the invoice when presented for payment.

<b>NEWSPAPER:</b>	<b><u>Plano Star Courier</u></b>
<b>DATE:</b>	<b><u>May 1, 2017</u></b>
<b>FAX:</b>	<b><u>972-529-1684</u></b>



# Collin County, Texas

## Bid Information

Bid Owner Courtney Wilkerson Senior Buyer  
Email cwilkerson@co.collin.tx.us  
Phone (972) 548-4113  
Fax (972) 548-4694

Bid Number 2017-202  
Title Tax Statement Preparation and  
Mailing Service  
Bid Type RFP  
Issue Date 05/02/2017  
Close Date 5/25/2017 02:00:00 PM (CT)

## Contact Information

Address 2300 Bloomdale Rd.  
Ste. 3160  
McKinney, TX 75071

Contact Courtney Wilkerson Senior Buyer  
Department Purchasing  
Building Admin. Building  
Floor/Room Ste.3160  
Telephone (972) 548-4113  
Fax (972) 548-4694  
Email cwilkerson@co.collin.tx.us

## Ship to Information

Address 2300 Bloomdale Rd.  
Ste. 2366  
McKinney, TX 75071

Contact  
Department Tax Office  
Building Admin. Building  
Floor/Room Ste. 2366  
Telephone  
Fax  
Email

## Supplier Information

Company Name \_\_\_\_\_  
Contact Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
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\_\_\_\_\_  
Telephone \_\_\_\_\_  
Fax \_\_\_\_\_  
Email \_\_\_\_\_

## Supplier Notes

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The undersigned hereby certifies the foregoing proposal submitted by the company listed below hereinafter called "offeror" is the duly authorized agent of said company and the person signing said proposal has been duly authorized to execute same. Offeror affirms that they are duly authorized to execute this contract; this company; corporation, firm, partnership or individual has not prepared this proposal in collusion with any other offeror or other person or persons engaged in the same line of business; and that the contents of this proposal as to prices, terms and conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this proposal.

Signature \_\_\_\_\_ Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## Bid Notes

Please login to view documents.

Collin County's intent of this Request for Proposal and resulting contract is to obtain proposals for Tax Statement Preparation & Mailing Service for the Tax Assessor/Collector. The proposal covers the printing of all items (statements, carrier envelopes and reply envelopes), data processing, inserting, first class postage and delivery to U.S. Postal Service for mailing tax statements. Any questions related to this RFP shall be directed to Courtney Wilkerson, cwilkerson@co.collin.tx.us.

## Bid Activities

Date	Name	Description
5/19/2017 05:00 PM (CT)	Intent to Submit Proposal	Do you intend to submit a proposal?

## Bid Messages

## Bid Attachments

The following attachments are associated with this opportunity and will need to be retrieved separately

Line	Filename	Description
Header	Legal Notice-Tax Statement Preparation and Mailing Service.pdf	Legal Notice
Header	General Instructions_Proposals.docx	General Instructions_Proposals
Header	Terms of Contract_Proposals.docx	Terms of Contract - Proposals
Header	Insurance updated 1-26-2015.doc	Minimum Insurance Requirements
Header	RFP-Tax Statement Preparation and Mailing Specs-DRAFT 4-18-17.pdf	Specifications
Header	Attachment A, Line Item 1-Property Tax Notification Statement-Front and Back.pdf	Attachment A, Line Item 1-Property Tax Notification Statement-Front and Back
Header	Attachment B, Line Item 1-Property Tax Statement (Homeowner) Page 1-front and back.pdf	Attachment B, Line Item 1-Property Tax Statement (Homeowner) Page 1-front and back
Header	Attachment C, Line Item 1-Property Tax Statement (Homeowner) Page 2-front and back.pdf	Attachment C, Line Item 1-Property Tax Statement (Homeowner) Page 2-front and back
Header	Attachment D, Line Item 1-Property Tax Statement (Mortgage Company) Page 1-front and back.pdf	Attachment D, Line Item 1-Property Tax Statement (Mortgage Company) Page 1-front and back
Header	Attachment E, Line Item 1-Property Tax Statement (Mortgage Company) Page 2-front and back.pdf	Attachment E, Line Item 1-Property Tax Statement (Mortgage Company) Page 2-front and back
Header	Attachment F, Line Item 2-February Statement-Blue.pdf	Attachment F, Line Item 2-February Statement-Blue
Header	Attachment G, Line Item 3-May Statement-Pink-Page 1.pdf	Attachment G, Line Item 3-May Statement-Pink-Page 1
Header	Attachment H, Line Item 3-May Statement-Page 2.pdf	Attachment H, Line Item 3-May Statement-Page 2
Header	Attachment I, Line Item 4-July Statement-Mint Green-Attorney.pdf	Attachment I, Line Item 4-July Statement-Mint Green-Attorney
Header	Attachment J, #9 non-standard return envelope.pdf	Attachment J, #9 non-standard return envelope
Header	Attachment K, #10 Window Mailing Envelopes blue (front).pdf	Attachment K, #10 Window Mailing Envelopes blue (front)
Header	Attachment L, #10 Window Mailing Envelopes blue (back).pdf	Attachment L, #10 Window Mailing Envelopes blue (back)

Header	Information_Regarding_Conflict_of_Interest_Questionnaire-.pdf	Information Regarding Conflict of Interest Questionnaire
Header	CIQ_113015.pdf	Conflict of Interest Questionnaire
Header	Bid Document.pdf	Bid Document (Complete if Submitting Manual Bid)
Header	W9_2014.pdf	W-9

## Bid Attributes

Please review the following and respond where necessary

#	Name	Note	Response
1	Delivery	<p>Delivery will be F.O.B. inside delivery at Collin County designated locations and all transportation charges are to be paid by the supplier to destination.</p> <p>Please state delivery in calendar days from date of order.</p>	_____ (Required)
2	Exceptions	<p>Do you take exceptions to the specifications. If so, by separate attachment, please state your exceptions. Valid Responses: [Please Select], Yes, No</p>	_____ (Required)
3	Insurance	<p>I understand that the insurance requirements of this solicitation are required and a certificate of insurance shall be submitted to the Purchasing department if I am awarded all or a portion of the resulting contract.</p> <p>Please initial.</p>	_____ (Required)
4	Subcontractors	<p>State the business name of all subcontractors and the type of work they will be performing under this contract.</p> <p>If you are fully qualified to self-perform the entire contract, please respond with "Not Applicable-Self Perform".</p>	_____ (Required)
5	Reference No. 1	<p>List a company or governmental agency where these same/like products /services, as stated herein, have been provided.</p> <p>Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.</p>	_____ (Required)
6	Reference No. 2	<p>List a company or governmental agency where these same/like products /services, as stated herein, have been provided.</p> <p>Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.</p>	_____ (Required)
7	Reference No. 3	<p>List a company or governmental agency where these same/like products /services, as stated herein, have been provided.</p> <p>Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.</p>	_____ (Required)

- 8 Cooperative Contracts \_\_\_\_\_ (Required)
- As permitted under Title 8, Chapter 271, Subchapter F, Section 271.101 and 271.102 V.T.C.A. and Title 7, Chapter 791, Subchapter C, Section 791.025, V.T.C.A., other local governmental entities may wish to also participate under the same terms and conditions contained in this contract. Each entity wishing to participate must enter into an inter-local agreement with Collin County and have prior authorization from vendor. If such participation is authorized, all purchase orders will be issued directly from and shipped directly to the local governmental entity requiring supplies/services. Collin County shall not be held responsible for any orders placed, deliveries made or payment for supplies/services ordered by these entities. Each entity reserves the right to determine their participation in this contract.
- Would bidder be willing to allow other local governmental entities to participate in this contract, if awarded, under the same terms and conditions?  
Valid Responses: [Please Select], Yes, No
- 9 Preferential Treatment \_\_\_\_\_ (Required)
- The County of Collin, as a governmental agency of the State of Texas, may not award a contract to a nonresident bidder unless the nonresident's bid is lower than the lowest bid submitted by a responsible Texas resident bidder by the same amount that a Texas resident bidder would be required to underbid a nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located (Government Code, Title 10, V.T.C.A., Chapter 2252, Subchapter A).
1. Is your principal place of business in the State of Texas?
2. If your principal place of business is not in Texas, in which State is your principal place of business?
3. If your principal place of business is not in Texas, does your state favor resident bidders (bidders in your state) by some dollar increment or percentage?
4. If your state favors resident bidders, state by what dollar amount or percentage.
- 10 Debarment Certification \_\_\_\_\_ (Required)
- I certify that neither my company nor an owner or principal of my company has been debarred, suspended or otherwise made ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension," as described in the Federal Register and Rules and Regulations.
- Please initial.
- 11 Immigration and Reform Act \_\_\_\_\_ (Required)
- I declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America.
- I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable by Collin County.
- Please initial.

- 12 Disclosure of Certain Relationships Chapter 176 of the Texas Local Government Code \_\_\_\_\_ (Required)  
requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor.
- By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code.
- Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.
- Please initial.
- 13 Anti-Collusion Statement Bidder certifies that its Bid/Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Bid/Proposal for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud. \_\_\_\_\_ (Required)
- No premiums, rebates or gratuities permitted; either with, prior to, or after any delivery of material or provision of services. Any such violation may result in Agreement cancellation, return of materials or discontinuation of services and the possible removal from bidders list.
- Please initial.
- 14 Disclosure of Interested Parties Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. \_\_\_\_\_ (Required)
- Section 2252.908 applies only to a contract entered into on or after January 1, 2016.
- Please initial.

15 Notification Survey

In order to better serve our offerors, the Collin County Purchasing Department is conducting the following survey. \_\_\_\_\_ (Required)  
We appreciate your time and effort expended to submit your bid. Should you have any questions or require more information please call (972) 548-4165.

How did you receive notice of this request?

Valid Responses: [Please Select], Plano Star Courier, Plan Room, Collin County eBid Notification, Collin County Website, Other

16 Proposer Acknowledgement

Proposer acknowledges, understands the specifications, \_\_\_\_\_ (Required)  
any and all addenda, and agrees to the proposal terms and conditions and can provide the minimum requirements stated herein. Offeror acknowledges they have read the document in its entirety, visited the site, performed investigations and verifications as deemed necessary, is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in Proposal submittal resulting from Proposer's failure to do so. Proposer acknowledges the prices submitted in this Proposal have been carefully reviewed and are submitted as correct and final. If Proposal is accepted, vendor further certifies and agrees to furnish any and all products/services upon which prices are extended at the price submitted, and upon conditions in the specifications of the Request for Proposal.

Please initial.

## Line Items

#	Qty	UOM	Description	Response
1	377,500	each	<p>Line item #1 - Original October Mailing: Cost per statement shall include 8.5" x 11" one page perforated printed front and back form, color printing on 24 lb. white paper (ink/paper color to be determined). Account History insert shall be included with the statement. The insert shall be 8.5" x 11" printed on both sides on white paper in black ink with information provided by the County. Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall also be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. E-mail first samples in PDF form within two (2) days of receiving file. For final proofing purposes Collin County requires the first 500 statements of residents whose last name start with the letters "M" and "B". Specific accounts may be requested for evaluation. Original samples for final proofing shall be received at tax office within four (4) days of contractor receiving data file. There will be three (3) envelopes: One (1) for sending statements and account history insert, #10 window envelope with printing on both sides, One (1) for return, 9 non-standard envelope, and On an as needed basis, larger envelopes for mailing multiple statements. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front &amp; back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front &amp; back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.</p>	<p>\$ _____ (Required) Unit Price</p>

Supplier Notes: \_\_\_\_\_

2	34,000	each	<p>Line Item #2 - February Delinquent Mailing: Cost per statement shall include print one sided on 20 lb. 8.5" x 11" blue perforated paper with black ink. Insert letter shall be included with the statement. The insert letter shall be 8.5" x 11" print one sided on white paper in black ink with information provided by the County. Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 34,000 late notices. There will be three (3) envelopes: One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, One (1) for return, #9 non-standard envelope, and On an as needed basis, larger envelopes for mailing multiple statements. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front &amp; back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front &amp; back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.</p>	<p>\$ _____ (Required) Unit Price</p>
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Supplier Notes: \_\_\_\_\_

3	18,000	each	<p>Line Item #3 – May Delinquent Mailing: Cost per statement shall include print one sided on 20 lb. 8.5" x 11" pink perforated paper with black ink. Insert letter shall be included with the statement. The insert letter shall be 8.5" x 11" print one sided on white paper in black ink with information provided by the County. Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 34,000 late notices. There will be three (3) envelopes: One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, One (1) for return, #9 non-standard envelope, and On an as needed basis, larger envelopes for mailing multiple statements. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front &amp; back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front &amp; back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.</p>	<p>\$ _____ (Required) Unit Price</p>
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Supplier Notes: \_\_\_\_\_

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4	13,500	each	<p>Line Item #4 – July Attorney Letter: print one sided on 20 lb. 8.5" x 11" mint green paper with black ink. Letters will be printed and sent to County attorneys on an as needed basis (to be determined at a later date). No postage, envelopes or mailing of the letters are necessary for this line-item. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portions of the statement. All letters are to be submitted to the County attorneys.; There will be approximately 13,500 notices. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front &amp; back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front &amp; back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.</p>	<p>\$ _____ (Required) Unit Price</p>
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Supplier Notes: \_\_\_\_\_

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1.11 For hard copy paper form submittals, any alterations made prior to opening date and time must be initialed by the signer of the RFP/CSP, guaranteeing authenticity. Submittals cannot be altered or amended after submission deadline.

1.12 Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax; therefore, the prices submitted shall not include taxes.

1.13 Any interpretations, corrections and/or changes to a Request for Proposal or Competitive Sealed Proposal and related Specifications or extensions to the opening/receipt date will be made by addenda to the respective document by the Collin County Purchasing Department. Questions and/or clarification requests must be submitted no later than seven (7) days prior to the opening/receipt date. Those received at a later date may not be addressed prior to the public opening. Sole authority to authorize addenda shall be vested in Collin County Purchasing Agent as entrusted by the Collin County Commissioners' Court. Addenda may be transmitted electronically via Collin County eBid.

1.13.1 Addenda will be transmitted to all that are known to have received a copy of the RFP/CSP and related Specifications. However, it shall be the sole responsibility of the Bidder/Quoter/Offeror to verify issuance/non-issuance of addenda and to check all avenues of document availability (i.e. **Collin County eBid** <https://collincountytx.ionwave.net/>, telephoning Purchasing Department directly, etc.) prior to opening/receipt date and time to insure Offeror's receipt of any addenda issued. Offeror shall acknowledge receipt of all addenda.

1.14 All materials and services shall be subject to Collin County approval.

1.15 Collin County reserves the right to make award in whole or in part as it deems to be in the best interest of the County.

1.16 Any reference to model/make and/or manufacturer used in specifications is for descriptive purposes only. Products/materials of like quality will be considered.

1.17 Offerors taking exception to the specifications shall do so at their own risk. By offering substitutions, Offeror shall state these exceptions in the section provided in the RFP/CSP or by attachment. Exception/substitution, if accepted, must meet or exceed specifications stated therein. Collin County reserves the right to accept or reject any and/or all of the exception(s)/substitution(s) deemed to be in the best interest of the County.

1.18 Minimum Standards for Responsible Prospective Offerors: A prospective Offeror must meet the following minimum requirements:

1.18.1 have adequate financial resources, or the ability to obtain such resources as required;

1.18.2 be able to comply with the required or proposed delivery/completion schedule;

1.18.3 have a satisfactory record of performance;

1.18.4 have a satisfactory record of integrity and ethics;

1.18.5 be otherwise qualified and eligible to receive an award.

Collin County may request documentation and other information sufficient to determine Offeror's ability to meet these minimum standards listed above.

1.20 Vendor shall bear any/all costs associated with its preparation of a RFP/CSP submittal.

1.21 Public Information Act: Collin County is governed by the Texas Public Information Act, Chapter 552 of the Texas Government Code. All information submitted by prospective bidders during the bidding process is subject to release under the Act.

1.22 The Offeror shall comply with Commissioners' Court Order No. 2004-167-03-11, County Logo Policy.

1.23 Interlocal Agreement: Successful bidder agrees to extend prices and terms to all entities that has entered into or will enter into joint purchasing interlocal cooperation agreements with Collin County.

1.24 Bid Openings: All bids submitted will be read at the county's regularly scheduled bid opening for the designated project. However, the reading of a bid at bid opening should be not construed as a comment on the responsiveness of such bid or as any indication that the county accepts such bid as responsive.

The county will make a determination as to the responsiveness of bids submitted based upon compliance with all applicable laws, Collin County Purchasing Guidelines, and project documents, including but not limited to the project specifications and contract documents. The county will notify the successful bidder upon award of the contract and, according to state law; all bids received will be available for inspection at that time.

## 2.0 TERMS OF CONTRACT

2.1 A proposal, when properly accepted by Collin County, shall constitute a contract equally binding between the Vendor/Contractor/Provider and Collin County. No different or additional terms will become part of this contract with the exception of an Amendment.

2.2 No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All Amendments to the contract will be made in writing by Collin County Purchasing Agent.

2.3 No public official shall have interest in the contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

2.4 The Vendor/Contractor/Provider shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.

2.5 Design, strength, quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.

2.6 Proposals must comply with all federal, state, county and local laws concerning the type(s) of product(s)/service(s)/equipment/project(s) contracted for, and the fulfillment of all ADA (Americans with Disabilities Act) requirements.

2.7 All products must be new and unused, unless otherwise specified, in first-class condition and of current manufacture. Obsolete products, including products or any parts not compatible with existing hardware/software configurations will not be accepted.

2.8 Vendor/Contractor/Provider shall provide any and all notices as may be required under the Drug-Free Work Place Act of 1988, 28 CFR Part 67, Subpart F, to its employees and all sub-contractors to insure that Collin County maintains a drug-free work place.

2.9 Vendor/Contractor/Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees and all entities, their officers, agents and employees who are participating in this contract from all suits, claims, actions, damages (including personal injury and or property damages), or demands of any character, name and description, (including attorneys' fees, expenses and other defense costs of any nature) brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of Vendor/Contractor/Provider's breach of the contract arising from an award, and/or any negligent act, error, omission or fault of the Vendor/Contractor/Provider, or of any agent, employee, subcontractor or supplier of Vendor/Contractor/Provider in the execution of, or performance under, any contract which may result from an award. Vendor/Contractor/Provider shall pay in full any judgment with costs, including attorneys' fees and expenses which are rendered against Collin County and/or participating entities arising out of such breach, act, error, omission and/or fault.

2.10 Expenses for Enforcement. In the event either Party hereto is required to employ an attorney to enforce the provisions of this Agreement or is required to commence legal proceedings to enforce the provisions hereof, the prevailing Party shall be entitled to recover from the other, reasonable attorney's fees and court costs incurred in connection with such enforcement, including collection.

2.11 If a contract, resulting from a Collin County RFP/CSP is for the execution of a public work, the following shall apply:

2.11.1 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Payment Bond if the contract is in excess of

\$25,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56<sup>th</sup> Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.11.2 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Performance Bond if the contract is in excess of \$100,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56<sup>th</sup> Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.12 Purchase Order(s) shall be generated by Collin County to the vendor. Collin County will not be responsible for any orders placed/delivered without a valid purchase order number.

2.13 The contract shall remain in effect until any of the following occurs: delivery of product(s) and/or completion and acceptance by Collin County of product(s) and/or service(s), contract expires or is terminated by either party with thirty (30) days written notice prior to cancellation and notice must state therein the reasons for such cancellation. Collin County reserves the right to terminate the contract immediately in the event the Vendor/Contractor/Provider fails to meet delivery or completion schedules, or otherwise perform in accordance with the specifications. Breach of contract or default authorizes the County to purchase elsewhere and charge the full increase in cost and handling to the defaulting Vendor/Contractor/Provider.

2.14 Collin County Purchasing Department shall serve as Contract Administrator or shall supervise agents designated by Collin County.

2.15 All delivery and freight charges (FOB Inside delivery at Collin County designated locations) are to be included as part of the proposal price. All components required to render the item complete, installed and operational shall be included in the total proposal price. Collin County will pay no additional freight/delivery/installation/setup fees.

2.16 Vendor/Contractor/Provider shall notify the Purchasing Department immediately if delivery/completion schedule cannot be met. If delay is foreseen, the Vendor/Contractor/Provider shall give written notice to the Purchasing Agent. The County has the right to extend delivery/completion time if reason appears valid.

2.17 The title and risk of loss of the product(s) shall not pass to Collin County until Collin County actually receives and takes possession of the product(s) at the point or points of delivery. Collin County shall generate a purchase order(s) to the Vendor/Contractor/Provider and the purchase order number must appear on all itemized invoices.

2.18 Invoices shall be mailed directly to the Collin County Auditor's Office, 2300 Bloomdale Road, Suite 3100, McKinney, Texas 75071. All invoices shall show:

2.18.1 Collin County Purchase Order Number;

2.18.2 Vendor's/Contractor's/Provider's Name, Address and Tax Identification Number;

2.18.3 Detailed breakdown of all charges for the product(s) and/or service(s) including applicable time frames.

2.19 Payment will be made in accordance with V.T.C.A., Government Code, Title 10, Subtitle F, Chapter 2251.

- 2.20 All warranties shall be stated as required in the Uniform Commercial Code.
- 2.21 The Vendor/Contractor/Provider and Collin County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.
- 2.22 The Vendor/Contractor/Provider agree to protect Collin County from any claims involving infringements of patents and/or copyrights.
- 2.23 The contract will be governed by the laws of the State of Texas. Should any portion of the contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract shall remain in effect. The contract is performable in Collin County, Texas.
- 2.24 The Vendor/Contractor/Provider shall not sell, assign, transfer or convey the contract, in whole or in part, without the prior written approval from Collin County.
- 2.25 The apparent silence of any part of the specification as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specification shall be made on the basis of this statement.
- 2.26 Vendor/Contractor/Provider shall not fraudulently advertise, publish or otherwise make reference to the existence of a contract between Collin County and Vendor/Contractor/Provider for purposes of solicitation. As exception, Vendor/Contractor/Provider may refer to Collin County as an evaluating reference for purposes of establishing a contract with other entities.
- 2.27 The Vendor/Contractor/Provider understands, acknowledges and agrees that if the Vendor/Contractor/Provider subcontracts with a third party for services and/or material, the primary Vendor/Contractor/Provider (awardee) accepts responsibility for full and prompt payment to the third party. Any dispute between the primary Vendor/Contractor/Provider and the third party, including any payment dispute, will be promptly remedied by the primary vendor. Failure to promptly render a remedy or to make prompt payment to the third party (subcontractor) may result in the withholding of funds from the primary Vendor/Contractor/Provider by Collin County for any payments owed to the third party.
- 2.28 Vendor/Contractor/Provider shall provide Collin County with diagnostic access tools at no additional cost to Collin County, for all Electrical and Mechanical systems, components, etc., procured through this contract.
- 2.29 Criminal History Background Check: If required, ALL individuals may be subject to a criminal history background check performed by the Collin County's Sheriff's Office prior to access being granted to Collin County. Upon request, Vendor/Contractor/Provider shall provide list of individuals to Collin County Purchasing Department within five (5) working days.
- 2.30 Non-Disclosure Agreement: Where applicable, vendor shall be required to sign a non-disclosure agreement acknowledging that all information to be furnished is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by vendor, except as provided in the contract/agreement, may cause serious harm or damage to Collin County. Therefore, Vendor agrees that Vendor will not use the information furnished for any purpose other than that stated in contract/agreement, and agrees that Vendor will not either directly or indirectly by agent, employee, or representative disclose this information, either in whole or in part, to any third party, except on a need to know basis for the purpose of evaluating any possible transaction. This agreement shall be binding upon Collin County and Vendor, and upon the directors, officers, employees and agents of each.

2.31 Vendors/Contractors/Providers must be in compliance with the Immigration and Reform Act of 1986 and all employees specific to this solicitation must be legally eligible to work in the United States of America.

2.32 Certification of Eligibility: This provision applies if the anticipated Contract exceeds \$100,000.00 and as it relates to the expenditure of federal grant funds. By submitting a bid or proposal in response to this solicitation, the Offeror certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors. In the event of placement on the list between the time of proposal submission and time of award, the Offeror will notify the Collin County Purchasing Agent. Failure to do so may result in terminating this contract for default.

2.33 Notice to Vendors/Contractors/Providers delivering goods or performing services within the Collin County Detention Facility: The Collin County Detention Facility houses persons who have been charged with and/or convicted of serious criminal offenses. When entering the Detention Facility, you could: (1) hear obscene or graphic language; (2) view partially clothed male inmates; (3) be subjected to verbal abuse or taunting; (4) risk physical altercations or physical contact, which could be minimal or possibly serious; (5) be exposed to communicable or infectious diseases; (6) be temporarily detained or prevented from immediately leaving the Detention Facility in the case of an emergency or "lockdown"; and (7) subjected to a search of your person or property. While the Collin County Sheriff's Office takes every reasonable precaution to protect the safety of visitors to the Detention Facility, because of the inherently dangerous nature of a Detention Facility and the type of the persons incarcerated therein, please be advised of the possibility of such situations exist and you should carefully consider such risks when entering the Detention Facility. By entering the Collin County Detention Facility, you acknowledge that you are aware of such potential risks and willingly and knowingly choose to enter the Collin County Detention Facility.

2.34 Delays and Extensions of Time when applicable:

2.34.1 If the Vendor/Contractor/Provider is delayed at any time in the commence or progress of the Work by an act or neglect of the Owner or Architect/Engineer, or of an employee of either, or of a separate contractor employed by the Owner, or by changes ordered in the Work, or by labor disputes, fire, unusual delay in deliveries, unavoidable casualties or other causes beyond the Vendor/Contractor/Provider's control, or by delay authorized by the Owner pending mediation and arbitration, or by other causes which the Owner or Architect/Engineer determines may justify delay, then the Contract Time shall be extended by Change Order for such reasonable time as the Owner/Architect/Engineer may determine.

2.34.2 If adverse weather conditions are the basis for a Claim for additional time, such Claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction.

2.35 Disclosure of Certain Relationships: Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.

2.36 Disclosure of Interested Parties: Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016.

**NOTE:** All other terms and conditions (i.e. Insurance Requirements, Bond Requirements, etc.) shall be stated in the individual RFP/CSP Solicitation documents as Special Terms, Conditions and Specifications.

### **3.0 INSURANCE REQUIREMENTS**

3.1 Before commencing work, the vendor shall be required, at its own expense, to furnish the Collin County Purchasing Agent with certified copies of all insurance certificate(s) indicating the coverage to remain in force throughout the term of this contract.

3.1.1 **Commercial General Liability** insurance including but not limited to the coverage indicated below. Coverage shall not exclude or limit Products/Completed Operations, Contractual Liability, or Cross Liability. Coverage must be written on occurrence form.

- Each Occurrence: \$1,000,000
- Personal Injury & Adv. Injury: \$1,000,000
- Products/Completed Operation Aggregate: \$2,000,000
- General Aggregate: \$2,000,000

3.1.2 **Workers Compensation** insurance as required by the laws of Texas, and Employers' Liability.

Employers' Liability

- Liability, Each Accident: \$500,000
- Disease-Each Employee: \$500,000
- Disease – Policy Limit: \$500,000

3.1.3 **Commercial Automobile Liability** insurance which includes any automobile (owned, non-owned, and hired vehicles) used in connection with the contract.

- Combined Single Limit – Each Accident: \$1,000,000

3.1.4 **Professional/Errors & Omissions Liability** insurance with a two (2) year extended reporting period. If you choose to have project coverage endorsed onto your base policy, this would be acceptable.

- Each Occurrence/Aggregate: \$1,000,000

3.1.5 **Umbrella/Excess Liability** insurance.

- Each Occurrence/Aggregate: \$1,000,000

3.2 With reference to the foregoing insurance requirement, the vendor shall endorse applicable insurance policies as follows:

3.2.1 A waiver of subrogation in favor of Collin County, its officials, employees, volunteers and officers shall be provided for General Liability, Commercial Automobile Liability, and Workers' Compensation.

3.2.2 The vendor's insurance coverage shall name Collin County as additional insured under the General Liability policy.



3.2.3 All insurance policies shall be endorsed to require the insurer to immediately notify Collin County of any decrease in the insurance coverage limits.

3.2.4 All insurance policies shall be endorsed to the effect that Collin County will receive at least thirty (30) days notice prior to cancellation, non-renewal or termination of the policy.

3.2.5 All copies of Certificates of Insurance shall reference the project/contract number.

3.3 All insurance shall be purchased from an insurance company that meets the following requirements:

3.3.1 A financial rating of A-VII or higher as assigned by the BEST Rating Company or equivalent.

3.4 Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent, and shall contain provisions representing and warranting the following:

3.4.1 Sets forth all endorsements and insurance coverages according to requirements and instructions contained herein.

3.4.2 Sets forth the notice of cancellation or termination to Collin County.

## **4.0 EVALUATION CRITERIA AND FACTORS**

- 4.1 The award of the contract shall be made to the responsible offeror, whose proposal is determined to be the best evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other factors set forth in the Request for Proposals in accordance with Vernon's Texas Code Annotated, Local Government 262.030.

The Evaluation Committee will review all proposals received by the Opening date and time as part of a documented evaluation process. For each decision point in the process, the County will evaluate contractors according to specific criteria and will elevate a certain number of contractors to compete against each other. The proposals will be evaluated on the following criteria.

The County will use a competitive process based upon "selection levels." The County recognizes that if a contractor fails to meet expectations during any part of the process, it reserves the right to proceed with the remaining contractors or to elevate a contractor that was not elevated before. The selection levels are described in the following sections.

The first part of the elevation process is to validate the completeness of the proposal and ensure that all the RFP guidelines and submittal requirements are met. Offerors may, at the discretion of the County, be contacted to submit clarifications or additional information within two business days. Incomplete or noncompliant RFPs may be disqualified.

### **LEVEL 1 - CONFORMANCE WITH MANDATORY REQUIREMENTS**

- 4.1.1 Conformance with RFP guidelines and submittal requirements. The following documents shall be submitted as part of the proposal. Failure to provide these documents shall deem Contractor as non-responsive.

4.1.1.1 Response to Section 6.0

### **LEVEL 2 – DETAILED PROPOSAL ASSESSMENT**

- 4.1.2 The Evaluation Committee will conduct a detailed assessment of all proposals elevated to this Level. Criteria evaluated in Level 2:

Points	Evaluation Criteria
25	Fit to General Requirements (Proposal Format Item 6.4)
30	Qualifications of the Firm/Experience/References with Similar Assignments, Proposal Formatting and a strong track record for on-time delivery for organizations comparable in size to Collin County, Texas will be a significant factor in the award process (Proposal Format Item 6.2; 6.3; 6.5)
45	Cost (Proposal Format Item 6.6)

## **5.0 SPECIAL CONDITIONS AND SCOPE OF SERVICES**

- 5.1 Authorization: By order of the Commissioners' Court of Collin County, Texas sealed proposals will be received for specialized printing for Tax Assessor/Collector.

- 5.2 Purpose: The intended use/purpose for this Request for Proposal is for various printing jobs required by the Tax Assessor/Collector.
- 5.3 Term: Successful Contractor (s) will be awarded a contract effective from date of award through August 31, 2018. At Collin County's option and approval by the Contractor, the contract may be renewed for four (4) additional one (1) year periods.
- 5.4 Point of Contact: Information regarding the purchasing process and the contents of this RFP may be obtained from the Collin County Purchasing Department or email [cwilkerson@co.collin.tx.us](mailto:cwilkerson@co.collin.tx.us), Courtney Wilkerson, Senior Buyer.
- 5.5 Funding: Funds for payment have been provided through the Collin County budget approved by the Commissioners' Court for this fiscal year only. State of Texas statutes prohibit the County from any obligation of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the current Collin County fiscal year shall be subject to budget approval.
- 5.6 Price Reduction: If during the life of the contract, the Contractor's net prices to its customers for the same product(s) and/or services shall be reduced below the contracted price, it is understood and agreed that the County shall receive such price reduction.
- 5.7 Price Re-determination: A price re-determination may be considered by Collin County only at the anniversary date of the contract. For purpose of this contract the anniversary date will be August 31<sup>st</sup> of each year. All requests for price re-determination shall be in written form, shall be submitted a minimum of sixty (60) days prior to anniversary date and shall include documents supporting price re-determination such as Manufacturer's direct cost, postage rates, Railroad Commission rates, Federal/State minimum wage law, Federal/State unemployment taxes, F.I.C.A, Insurance Coverage Rates, etc. The proposer's past experience of honoring contracts at the bid price will be an important consideration in the evaluation of the lowest and best bid. Collin County reserves the right to accept or reject any/all of the price re-determination as it deems to be in the best interest of the County.
- 5.8 Delivery/Completion/Response Time: Contractor shall place product(s) and/or complete services at the County's designated location(s) and time(s) as stated herein.
- 5.9 Testing: Testing may be performed at the request of Collin County, by an agent so designated by the County, without expense to Collin County.
- 5.10 Samples/Demos: When requested, samples/demos shall be furnished to the County at no expense.
- 5.11 Approximate Value: The estimated value of this contract is \$50,000. Approximate value does not constitute an order.
- 5.12 Approximate Usage: Estimated annual quantities are given for each commodity. Approximate usage does not constitute an order, but only implies the probable quantity the County will use. Commodities will be ordered on an as-needed basis.

5.13 **PROPOSAL SCHEDULE**

RFP released: May 2, 2017

Deadline for submission of contractor questions: Wednesday, May 17, 2017 5:00pm CST

Proposals due: Thursday, May 25, 2017 at 2:00pm CST

Award of Solicitation:

August 2017

Collin County reserves the right to change the schedule of events as it deems necessary.

#### 5.14 **PURPOSE AND INTENT**

Collin County's intent of this Request for Proposal and resulting contract is to obtain proposals for Tax Statement Preparation & Mailing Service for the Tax Assessor/Collector. The proposal covers the printing of all items (statements, carrier envelopes and reply envelopes), data processing, inserting, first class postage and delivery to U.S. Postal Service for mailing tax statements.

#### 5.15 **SAMPLE REVIEW**

This proposal includes various items and forms, Attachments A-L. Proposer shall assume sole responsibility for viewing these samples in order to submit a proposal consistent with the requirements of the County. Failure to do so may result in rejection of proposal. When a discrepancy occurs between specifications or the on-line PDF sample, the hard copy samples shall prevail. Samples will be made available to prospective proposers for viewing during the hours of 9:00am-4:00pm Monday through Friday (excluding County Holidays) in the Purchasing Department, Jack Hatchell Administration Building, 2300 Bloomdale Road, Suite 3160 McKinney, TX 75071. PDF copies attached, Refer to Attachments A-L.

#### 5.16 **GENERAL REQUIREMENTS**

**Contractor's proposal shall indicate how the Contractor proposes to meet the following requirements and business needs of the Tax Assessor/Collector's Office.**

Listed below are the minimum requirements and are intended to govern the general printing services, including all material necessary for a finished product, which Collin County uses during the course of routine County business.

5.16.1 **TYPES OF MAILINGS:** All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing.

5.16.1.1 Line item #1 - Original October Mailing: Cost per statement shall include 8.5" x 11" one page perforated printed front and back form, color printing on 24 lb. white paper (ink/paper color to be determined). Refer to Attachments A, B, & D for samples.

Account History insert shall be included with the statement. The insert shall be 8.5" x 11" printed on both sides on white paper in black ink with information provided by the County. Refer to Attachments C & E for samples.

Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall also be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. E-mail first samples in PDF form within two (2) days of receiving file. For final proofing purposes Collin County requires the first 500 statements of residents whose last name start with the letters "M" and "B". Specific accounts may be requested for evaluation. Original samples for final proofing shall be received at tax office within four (4) days of contractor receiving data file.

There will be three (3) envelopes:

- One (1) for sending statements and account history insert, #10 window envelope with printing on both sides, Refer to Attachment K-L for samples.
- One (1) for return, 9 non-standard envelope, Refer to Attachment J for sample.
- On an as needed basis, larger envelopes for mailing multiple statements.

5.16.1.1.1 There are three different types of statements for the original mailing:

- 5.16.1.1.1.1 Original owner statement - approximately 210,000.
- 5.16.1.1.1.2 Mortgage Company statement - approximately 12,500.
- 5.16.1.1.1.3 Notification statement to owner - approximately 155,000. Mortgage Company receives either a mortgage company statement or taped version at their request.

5.16.1.2 Line Item #2 - February Delinquent Mailing: Cost per statement shall include print one sided on 20 lb. 8.5" x 11" blue perforated paper with black ink. Refer to Attachment F for sample.

Insert letter shall be included with the statement. The insert letter shall be 8.5" x 11" print one sided on white paper in black ink with information provided by the County. Refer to Attachment H for sample.

Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 34,000 late notices.

There will be three (3) envelopes:

- One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, Refer to Attachment K-L for samples.
- One (1) for return, #9 non-standard envelope, Refer to Attachment J for sample.
- On an as needed basis, larger envelopes for mailing multiple statements.

5.16.1.3 Line Item #3 – May Delinquent Mailing: Cost per statement shall include print one sided on 20 lb. 8.5” x 11” pink perforated paper with black ink. Refer to Attachment G for sample.

Insert letter shall be included with the statement. The insert letter shall be 8.5” x 11” print one sided on white paper in black ink with information provided by the County. Refer to Attachment H for sample.

Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 18,000 late notices.

There will be three (3) envelopes:

- One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, Refer to Attachment K-L for samples.
- One (1) for return, #9 non-standard envelope, Refer to Attachment J for sample.
- On an as needed basis, larger envelopes for mailing multiple statements.

5.16.1.4 Line Item #4 – July Attorney Letter: print one sided on 20 lb. 8.5” x 11” mint green paper with black ink. Letters will be printed and sent to County attorneys on an as needed basis (to be determined at a later date). No postage, envelopes or mailing of the letters are necessary for this line-item. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portions of the statement. All letters are to be submitted to the County attorneys.; There will be approximately 13,500 notices. Refer to Attachment I for line item 4 July statement, July statements shall be in mint green.

5.16.2 All artwork, layouts, plate negatives, proofs and all CD’s (data and image) shall become the property of Collin County.

5.16.3 Contractor shall adhere to all current postal regulations as they become in effect during the term of this contract.

5.16.4 All work shall be completed in a secure location.

5.16.5 Contractor shall have redundant capability (able to complete project, on time, in case of local emergency).

- 5.16.6 The information on the data file is not to be released or used for any purpose other than preparation and mailing of the Collin County Tax Statements for the current tax year.
- 5.16.7 All pieces are to be mailed with the address from the supplied data file. All statements missing the city, state and/or Zip Code as well as any statements with foreign addresses are to be delivered to the Collin County Tax Office in bulk.
- 5.16.8 Contractor shall be able to read and prepare flat file in ascii format for printing within (2) calendar days for October mailing and within (1) calendar day for February and May mailing of obtaining a correct file. Verify via e-mail immediately upon receipt of file.
- 5.16.9 October statements are to be mailed completely within 7 days from the date that the Tax Assessor/Collect delivers the file. February, May & July statements mailing date shall be 2 days from the date that the Tax Assessor/Collect delivers the file.
- 5.16.10 Proposer shall pre-sort statements by ZIP Code and address. When the address does not have the +4 ZIP Code information, (additional 4-digit add-on code) at the end of the original 5 digit ZIP Code, zeros are not to be added in place of the +4 code, it is to be left blank, use only the original 5-digit ZIP Code.
- 5.16.11 When multiple statements are mailed to the same name and address, they are to be mailed in a single parcel or the most cost effective way.
- 5.16.12 There shall be a verification process to determine how many statements have been printed, processed, and mailed.
- 5.16.13 Collin County will pay actual postage costs.
  - 5.16.13.1 October Mailing- Collin County will provide Contractor a check for one hundred percent (100%) of the estimated postage prior to the October mailing. Contractor will reimburse Collin County for any outstanding balance. Contractor shall invoice Collin County for any additional postage, not included in the original estimate.
  - 5.16.13.2 Contractor shall provide form indicating total pieces mailed, amount of postage, date mailed and stamped by U.S. Postal Service. The information shall be submitted to the Tax Assessor/Collector's Office within seventy-two (72) hours of completing.
  - 5.16.13.3 February, May and July mailings will be reimbursed actual postage.
- 5.16.14 Microfiche is to be provided to Collin County by December 15<sup>th</sup> of each year.
- 5.16.15 No overruns allowed.
- 5.16.16 The tax roll is to be provided on microfiche.

- 5.16.17 October and delinquent tax statements are to be provided on CD or USB drive within two (2) weeks of mailing statements.
- 5.16.18 The Successful Contractor shall start on form and data mapping immediately upon award in order to be prepared to begin printing samples after arrival of data to meet mailing deadline. Tax Office will provide prior years' data file by September 5<sup>th</sup>.
- 5.16.19 Contractor shall have access to FTP site.
- 5.16.20 Tax Assessor/Collector's Office shall be notified by email at each of the following stages:
  - 5.16.20.1 Tax Statement Template is completed and accepted;
  - 5.16.20.2 File is received and workable;
  - 5.16.20.3 File is being processed;
  - 5.16.20.4 Printing process begins,
  - 5.16.20.5 Printing process ends,
  - 5.16.20.6 Statements are delivered to the Postal Service;
  - 5.16.20.7 Delays inhibiting processing or mailing of statements.
- 5.16.21 The Tax Assessor/Collector shall be notified by phone or email within 2 hours of any delays in the process from the time the statement file is delivered through the completion of the mailing.
- 5.16.22 All statements without a complete address, ie: number, street & name or P.O. Box number, city, state, and ZIP Code are to delivered to the Tax Assessor/Collector in bulk without attempting to mail to the incomplete address.
- 5.16.23 Tax Assessor/Collector reserves right to makes changes in tax statement template annually to be provided no less than 30 days prior to the statement file being delivered.



## **6.0 PROPOSAL FORMAT**

In accordance with the directions below, offeror shall provide a response for each item in Sections 5.16 and Sections 6.2-6.8 in order and include item numbers in response. Answer all questions fully, clearly, and concisely, giving complete information. Do not skip items. Do not refer to other parts of your proposal for the answers. You may not modify either the order or language of the question. Responses shall include a statement of “agree”, “confirmed”, “will provide”, “not applicable”, or “exception taken” along with any additional information. If an item is “not applicable” or “exception taken”, offeror shall state that and refer to Section 7.0 Exceptions, with explanation.

Offeror shall adhere to the instructions in this request for proposals on preparing and submitting the proposal. If offeror does not follow instructions regarding proposal format, points will be deducted during the evaluation process.

- 6.1 PROPOSAL DOCUMENTS:** To achieve a uniform review process and to obtain a maximum degree of comparability, the proposal shall, at a minimum include a Table of Contents detailing sections and corresponding page numbers.

- 6.1.1 Proposals may be submitted online via <http://collincountytx.ionwave.net> or submitted via CD-ROM or Flash Drive. Electronic submissions are preferred.
- 6.1.2 If submitting manually, proposal shall be submitted in a sealed envelope or box with RFP name, number, and name of firm printed on the outside of the envelope or box. Manual submittals shall be sent/delivered to the following address and shall be received prior to the date/time for opening:

Collin County Purchasing  
2300 Bloomdale, Suite 3160  
McKinney, TX 75071

Paper copies shall be printed on letter size (8 ½ x 11) paper and assembled using spiral type bindings, staples, or binder clips. Do not use metal-ring hard cover binders. Manual submittals shall include an electronic copy in a searchable format.

It shall be the responsibility of the offeror to insure that their proposal reaches Collin County Purchasing prior to the date/time for the opening no matter which submission method is used.

## **6.2 FIRM OVERVIEW**

Offeror shall define the overall structure of the Firm to include the following:

- 6.2.1 A descriptive background of your company’s history.
- 6.2.2 State your principal business location and any other service locations.
- 6.2.3 What is your primary line of business?
- 6.2.4 How long have you been selling product(s) and/or providing service(s)?

## **6.3 STAFF QUALIFICATIONS/EXPERIENCE/CREDENTIALS & ADDITIONAL INFORMATION**

- 6.3.1 Offeror is requested to provide qualifications as well as experience information on Offeror’s key personnel that will be assigned to this project.

## **6.4 GENERAL REQUIREMENTS**

- 6.4.1 Offeror shall provide a response for each of the requirements in Section 5.16 in order and include item numbers in response.
- 6.4.2 Offeror shall follow format outlined in Section 6.0 when submitting responses.

## 6.5 REFERENCES

- 6.5.1 Offeror is requested to include at least three (3) references with names, addresses, email addresses, and telephone numbers and description of the project. References with similar projects and users are preferred.
- 6.5.2 Offeror shall provide detailed listing of all County and Appraisal District current and prior clients within the last five (5) years.

## 6.6 PRICING/FEES

All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing.

Statement pricing shall include costs for all materials, labor, typesetting, set up, forms, test samples, proofs, overprinting of data information and all other **costs** associated with the job (see 5.16.1 for expanded information). Please note quantities are approximate, vendor to invoice on actual number of statements.

- 6.6.1 Line Item 1 State Unit Cost. (See Section 5.16.1.1 for complete details)
- 6.6.2 Line Item 2 State Unit Cost. (See Section 5.16.1.2 for complete details)
- 6.6.3 Line Item 3 State Unit Cost. (See Section 5.16.1.3 for complete details)
- 6.6.4 Line Item 4 State Unit Cost. (See Section 5.16.1.4 for complete details)

## 7.0 EXCEPTIONS

Instructions for completing section:

The exception table shall be completed for any exception from requirements identified in this RFP. Please complete the following worksheet listing any and all exceptions from the information requested in the Request for Proposal. Attach additional pages as needed. If no exceptions are listed in Section 7.0 it is understood that the offeror has agreed to all RFP requirements, the response will be considered as confirmed even if it is listed elsewhere as an exception.

Section Number/ Question Number	Required Service You are Unable to Perform	Steps Taken to Meet Requirement

**Attachment A-**  
**Line Item 1**  
**Property Tax Notification**  
**Statement**

**2015**  
**PROPERTY TAX**  
**NOTIFICATION/STATEMENT**

**ACCOUNT NUMBER**

[REDACTED]

**KENNETH L. MAUN**  
**TAX ASSESSOR COLLECTOR**  
**COLLIN COUNTY**

P.O. BOX 8046  
MCKINNEY, TEXAS 75070-8046  
972-547-5020  
METRO 972-424-1460 EXT. 5020

**OFFICE LOCATIONS**

2300 BLOOMDALE RD. STE. 2324  
MCKINNEY, TX 75071  
920 E. PARK BLVD. STE. 100  
PLANO, TX 75074  
6101 FRISCO SQUARE BLVD. STE. 2000  
FRISCO, TX 75034

YOUR ORIGINAL TAX STATEMENT HAS BEEN REQUESTED BY, AND MAILED TO, THE PARTY LISTED AT THE BOTTOM OF THIS STATEMENT.  
IF YOU DO NOT HAVE AN ESCROW ACCOUNT WITH YOUR MORTGAGE COMPANY AND ARE RESPONSIBLE FOR PAYING YOUR OWN TAXES, YOU MAY USE THIS NOTIFICATION AS A STATEMENT.

TO CORRECT AN ERROR IN OWNERSHIP, EXEMPTIONS OR JURISDICTIONS, YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT

**OWNER NAME AND ADDRESS**

**PROPERTY DESCRIPTION**



[REDACTED]

[REDACTED]

SITUS: [REDACTED]

OWNER ID: [REDACTED]

EXEMPTIONS:

Property Class	Land Value	Agricultural Exclusion	Improvement Value	Personal Property	Appraised Value (Market)	Homestead Cap	Assessed Value
Qualifying	90,900	0	337,276	0	428,176	0	428,176
Non Qualifying	0	0	0	0	0	0	0
Agricultural	0	0	0	0	0	0	0
Total	90,900	0	337,276	0	428,176	0	428,176

TAXING ENTITY	ASSESSED VALUE	EXEMPTION AMOUNT	TAXABLE VALUE	TAX RATE	CEILING YEAR	AMOUNT	TAXES BY ENTITY
COLLIN COUNTY	428,176	0	428,176	0.225000			963.40
LUCAS CITY	428,176	0	428,176	0.320661			1,372.99
COLLIN COLLEGE	428,176	0	428,176	0.081960			350.93
MCKINNEY ISD	428,176	0	428,176	1.670000			7,150.54
*ADDITIONAL CITY SALES TAX REDUCED YOUR CITY AD VALOREM TAX BY \$ 80.47.							

Visit [www.certifiedpayments.net](http://www.certifiedpayments.net) to pay by electronic check or credit card  
Bureau code # 5475020



Convenience fee charged.  
or call Certified Payments at 1-877-264-7533  
credit card only - no electronic checks by phone

Only persons already receiving an over 65, disabled veteran or disabled person exemption may pay current taxes on their resident homestead in four installments without penalty or interest if their first payment is made by **January 31st**.  
Remaining three installments due dates are **March 31st**, **May 31st**, and **July 31st**.

**1st INSTALLMENT**

[REDACTED]

**TOTAL TAXES DUE NOW**

\$9,837.86

**DELINQUENT 2/1/2016**

YOUR CHECK WILL BE CONVERTED INTO AN ELECTRONIC FUND TRANSFER.

**DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT.**

THE PARTY LISTED BELOW HAS REQUESTED YOUR PROPERTY TAX STATEMENT

IF YOU ARE RESPONSIBLE FOR PAYING YOUR OWN TAXES, PLEASE USE THIS NOTIFICATION AS A STATEMENT.

TAXES WILL BE DELINQUENT FEB. 1, 2016. UNPAID TAXES WILL INCUR THE FOLLOWING PENALTY & INTEREST, IF PAID IN:

FEBRUARY +7%	10,526.51
MARCH +9%	10,723.28

PARTIAL PAYMENTS ARE ACCEPTED BUT ANY UNPAID TAXES WILL INCUR PENALTIES & INTEREST ON FEB.1ST

**ACCOUNT NUMBER**

[REDACTED]

**TOTAL TAXES DUE NOW**

\$9,837.86

**DELINQUENT 2/1/2016**

**STATEMENT REQUESTED BY:**

**REFERENCE NUMBER**

[REDACTED]

[REDACTED]

[REDACTED]

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND YOU OCCUPY THE PROPERTY DESCRIBED IN THIS DOCUMENT AS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

DO NOT PAY THIS STATEMENT IF THE PARTY NAMED ABOVE IS YOUR MORTGAGE COMPANY THEY WILL BE PAYING YOUR TAXES IF YOU HAVE AN ESCROW ACCOUNT WITH THEM

PLEASE MAKE ADDRESS CORRECTIONS HERE.

[REDACTED]



20150R464700A01101000098378600010526510001072328000000000000C01



## INFORMATION ON TAXES

Assessment Ratio 100%

Property taxes are the primary sources of local government revenue in Texas. Your Tax Assessor Collector in Collin County will be collecting Ad Valorem, or property taxes, for the following entities: Collin County, Collin County Community College District, the Cities of Allen, Anna, Blue Ridge, Celina, Fairview, Farmersville, Frisco, Josephine, Lavon, Lowry Crossing, Lucas, McKinney, Melissa, Murphy, Nevada, New Hope, Parker, Plano, Princeton, Prosper, Richardson, Sachse, St. Paul, Weston, and Wylie, Seis Lagos Utility District, the Allen, Anna, Blue Ridge, Celina, Community, Farmersville, Frisco, Lovejoy, McKinney, Melissa, Plano, Princeton, Prosper and Wylie Independent School Districts, and possibly others.

YOUR CAREFUL REVIEW OF TAXPAYER INFORMATION CONTAINED IN THIS STATEMENT COULD HELP TO ELIMINATE MANY TAX PROBLEMS IN THE FUTURE.

You have from October to January 31 of the next year to pay your taxes without penalty or interest. You will be charged penalty and interest on February 1.

**ANY ERRORS OR DISCREPANCIES IN LEGAL DESCRIPTION, NAME, ADDRESS OR QUESTIONS CONCERNING VALUE SHOULD BE REFERRED TO THE CENTRAL APPRAISAL DISTRICT.**

If your taxes should be paid by a mortgage company, your copy of the statement should indicate "Property Tax Notification". If your statement is an original copy, please forward this statement to your mortgage company with your loan number.

If you bought other property and did not receive a tax statement, or sold this property and should not have received the statement, please contact this office immediately. If you own multiple properties and have not received all your statements... NOW is the time to INQUIRE about your OTHER STATEMENTS.

Penalty and interest are imposed at the statutory rate of 12% penalty and 12% per year interest on unpaid taxes WHETHER OR NOT THE TAXPAYER RECEIVED THE TAX BILL. By July 1st, a delinquent taxpayer will have incurred 18% penalty and interest and up to 20% for attorney fees and runs a risk of being sued or having his/her property seized after that time.

**THE TAX COLLECTOR DOES NOT HAVE ANY LEGAL AUTHORITY TO FORGIVE ANY PENALTY OR INTEREST CHARGE ON AN UNPAID TAX, NO MATTER HOW GOOD YOUR REASON IS FOR NOT PAYING.**

On real property (land and buildings), the current owner can be held liable for any unpaid taxes on the land, even for years before he/she bought the property. The new owner is liable for the entire year's tax to the Tax Collector, even if that person bought the property during the year and had their tax prorated with the seller at the time of closing.

On personal property (business inventory, mobile homes, equipment, airplanes, etc) the person who owned the property on January 1 of the tax year is personally liable for the entire year's tax, even if he/she sold the property during the year.

THE CENTRAL APPRAISAL DISTRICT is a **SEPARATE** local agency and is not part of County government or the Collin County Tax Office. The CAD decides what property is to be taxed, its appraised value, whether to grant exemptions, who the taxable owner is, his/her address, and what taxing jurisdictions tax the property.

**HOMESTEAD CAP VALUE:** In November 1997, Texas voters approved a constitutional amendment to limit increases in the appraised value of residence homestead to 10 percent annually. The new law, Property Tax Code Section 23.23, provides that the appraised value of a residence homestead beginning in the 1998 tax year may not exceed the lesser of: (1) the market value of the property; or (2) the sum of: (A) 10 percent of the appraised value of the property for the last year in which the property was appraised for taxation times the number of years since the property was last appraised; (B) the appraised value of the property for the last year in which the property was appraised; and (C) the market value of all new improvements to the property.

### OVER AGE 65/DISABILITY INSTALLMENT PAYMENT OF HOMESTEAD TAXES OPTION

To take advantage of this option a qualified individual who occupies a residence homestead must pay at least one fourth of his taxes by Jan. 31. The remaining taxes must be paid in three equal installments due by March 31<sup>st</sup>, May 31<sup>st</sup>, and July 31<sup>st</sup>. If the individual fails to make a payment before the installment date listed above, the unpaid amount is delinquent and incurs a penalty of 6 percent and interest as provided in Section 31.031 S.P.T.C

If you have a mortgage company you will need to make them aware of your intent to participate in the OA65/Disabled person installment payment option.

### EXEMPTIONS:

CAREFULLY REVIEW YOUR EXEMPTIONS ON FACE OF STATEMENT. IF THE EXEMPTIONS SHOWN ARE NOT ACCURATE, OR IF YOU HAVE ANY QUESTIONS ABOUT YOUR EXEMPTIONS, **CALL THE CENTRAL APPRAISAL DISTRICT IMMEDIATELY.** MARKET VALUE WILL BE REDUCED BY EXEMPTIONS WHERE APPROPRIATE AND APPROVED TO OBTAIN TAXABLE VALUE.

POSSIBLE EXEMPTIONS (AS THEY MAY APPEAR ON STATEMENT):

1. **HS001 - HOMESTEAD.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY. NOTE: THE COLLIN COUNTY COMMUNITY COLLEGE DISTRICT DOES NOT OFFER THIS EXEMPTION AT THIS TIME.
2. **OV003 - OVER AGE 65.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY.
3. **DP005 - DISABLED.** THIS EXEMPTION WILL BE RECOGNIZED AS AUTHORIZED BY ANY TAXING ENTITY.
4. **DV001-DV004 - VETERAN.** THIS IS A STATE MANDATED EXEMPTION. THE EXEMPTION ALLOWED IS BASED UPON THE PERCENTAGE OF DISABILITY CERTIFIED BY THE VETERANS ADMINISTRATION, TO A MAXIMUM OF \$12,000.

WHEN YOU PROVIDE A CHECK AS PAYMENT, YOU AUTHORIZE US EITHER TO USE INFORMATION FROM YOUR CHECK TO MAKE A ONE-TIME ELECTRONIC FUND TRANSFER FROM YOUR ACCOUNT OR TO PROCESS THE PAYMENT AS A CHECK TRANSACTION. WHEN WE USE INFORMATION FROM YOUR CHECK TO MAKE AN ELECTRONIC FUND TRANSFER, FUNDS MAY BE WITHDRAWN FROM YOUR ACCOUNT AS SOON AS THE SAME DAY WE RECEIVE YOUR PAYMENTS, AND YOU WILL NOT RECEIVE YOUR CHECK BACK FROM YOUR FINANCIAL INSTITUTION.

BE SURE TO ENCLOSE THE STUB PORTION OF YOUR TAX STATEMENT WHEN YOU PAY BY MAIL. SEND CHECK OR MONEY ORDER. CREDIT CARDS MAY BE PROCESSED THROUGH CERTIFIED PAYMENTS, INC. THERE WILL BE A NOMINAL FEE FOR THIS SERVICE. SEE FRONT OF THIS STATEMENT. DO NOT SEND CASH THROUGH THE MAIL. IF YOU WISH TO PAY IN PERSON, YOU MAY PAY AT THE TAX OFFICE (ADDRESSES LISTED ON FRONT PAGE). **BE SURE TO WRITE YOUR ACCOUNT NUMBER ON YOUR CHECK TO INSURE PROPER CREDIT.**

**Attachment B-**  
**Line Item 1**  
**Property Tax Statement**  
**(Homeowner)**  
**Page 1-front and back**



## ACCOUNT NUMBER


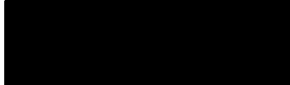
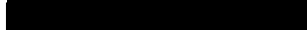
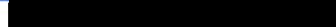

**P.O. BOX 8046  
MCKINNEY, TEXAS 75070-8046  
972-547-5020  
METRO 972-424-1460 EXT. 5020**

2300 BLOOMDALE RD. STE. 2324  
MCKINNEY, TX 75071

920 E. PARK BLVD. STE. 100  
PLANO, TX 75074

6101 FRISCO SQUARE BLVD. STE. 2000  
FRISCO, TX 75034

TO CORRECT AN ERROR IN OWNERSHIP, EXEMPTIONS OR JURISDICTIONS,  
YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT

OWNER NAME AND ADDRESS	PROPERTY DESCRIPTION
 	
	<b>SITUS:</b> 
	<b>OWNER ID:</b> 
	<b>EXEMPTIONS:</b>

Property Class	Land Value	Agricultural Exclusion	Improvement Value	Personal Property	Appraised Value (Market)	Homestead Cap	Assessed Value
Qualifying	0	0	0	0	2,100	0	2,100
Non Qualifying	0	0	0	0	0	0	0
Agricultural	0	0	0	0	0	0	0
<b>Total</b>	0	0	0	2,100	2,100	0	2,100

TAXING ENTITY	ASSESSED VALUE	EXEMPTION AMOUNT	TAXABLE VALUE	TAX RATE	CEILING		TAXES BY ENTITY
					YEAR	AMOUNT	
COLLIN COUNTY	2,100	0	2,100	0.225000			4.72
PLANO CITY	2,100	0	2,100	0.488600			10.26
COLLIN COLLEGE	2,100	0	2,100	0.081960			1.72
PLANO ISD	2,100	0	2,100	1.439000			30.22
							RENDITION PENALTY 4.69

TAXES WILL BE DELINQUENT FEB. 1, 2016. UNPAID TAXES WILL INCUR THE FOLLOWING PENALTY & INTEREST, IF PAID IN:

FEBRUARY +7%	55.21
MARCH +9%	56.25

PARTIAL PAYMENTS ARE ACCEPTED BUT ANY UNPAID TAXES WILL INCUR PENALTIES & INTEREST ON FEB.1ST

**QTR INSTALLMENT**  
(if eligible - see reverse)

\$51.61

## TAXES BECOME DELINQUENT

DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT.

**Do not fold, paper clip or staple check to bill**

KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
P.O. BOX 8046  
MCKINNEY, TX 75070-8046

Only persons already receiving an over 65, disabled person or disabled veteran exemption may pay current taxes on their resident homestead in four installments without penalty or interest if their first payment is made by **January 31st**. Remaining three installment due dates **March 31st, May 31st and July 31st**

☐ Please check if you are making a quarter payment

PLEASE MAKE ADDRESS CORRECTIONS HERE

**TOTAL TAXES DUE NOW**

\$51.61

**TAXES BECOME DELINQUENT**  
**2/1/2016**



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## INFORMATION ON TAXES

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**Attachment C-**  
**Line Item 1**  
**Property Tax Statement**  
**(Homeowner)**  
**Page 2-front and back**

# Information about Property Values and Taxes

From the files of Kenneth L. Maun, Tax Assessor Collector of Collin County

The following information show what values, exemptions, tax rates and tax levies have been on this property for the last six years for each entity by whom taxed, and the percentage change from the prior year. A five year comparison is just below that.

## ACCOUNT HISTORY

Account #

Tax Year	Appraised Value	Appraisal % Chg	Exemption Amount	Taxable Value	Value % Chg	Tax Rate Per \$100	Rate % Chg	Tax	Tax % Chg
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## MAINTENANCE AND DEBT RATE INFORMATION

TAX YEAR	MAINT RATE	DEBT RATE
2015	1.170000	0.269000
2014	1.170000	0.278000

PLANO ISD

NOTE: Maint Rate = Maintenance and Operations Tax rate and Debt Rate = Interest and Sinking Tax Rate Changes in exemptions or freezes can make a big change in the percentage calculations. Data is not shown where information was not available. The most common reason the information was not available is that the County Tax Office was not collecting for the entity for those years or the tax record did not exist in the prior years.

## **APPRAISAL DISTRICT INFORMATION**

### **COLLIN CENTRAL APPRAISAL DISTRICT**

250 W. Eldorado Parkway  
McKinney, TX 75069-8023  
Phone: 469-742-9200  
Fax: 469-742-9207  
Web site: [www.collincad.org](http://www.collincad.org)

### **DENTON CENTRAL APPRAISAL DISTRICT**

3911 Morse Street  
P O Box 2816  
Denton TX 76208-2816  
Phone: 940-349-3800  
Fax: 940-349-3801  
Web site: [www.dentoncad.com](http://www.dentoncad.com)

### **FANNIN CENTRAL APPRAISAL DISTRICT**

831 W. State Hwy. 56  
Bonham, TX 75418-8604  
Phone: 903-583-8701  
Fax: 903-583-8015  
Web site: [www.fannincad.org](http://www.fannincad.org)

### **HUNT CENTRAL APPRAISAL DISTRICT**

4801 King St.  
P O Box 1339  
Greenville, TX 75403-1339  
Phone: 903-454-3510  
Fax: 903-454-4160  
Web site: [www.hunt-cad.org](http://www.hunt-cad.org)

### **GRAYSON CENTRAL APPRAISAL DISTRICT**

205 N. Travis Street  
Sherman, TX 75090-5922  
Phone: 903-893-9673  
Fax: 903-892-3835  
Web site: [www.graysonappraisal.org](http://www.graysonappraisal.org)

### **DALLAS CENTRAL APPRAISAL DISTRICT**

2949 N. Stemmons Frwy.  
Dallas, TX 75247-6195  
Phone: 214-631-0910  
Web site: [www.dallascad.org](http://www.dallascad.org)

### **ROCKWALL CENTRAL APPRAISAL DISTRICT**

841 Justin Rd.  
Rockwall, TX 75087-4842  
Phone: 972-771-2034  
Fax: 972-771-6871  
Web site: [www.rockwallcad.com](http://www.rockwallcad.com)

**Attachment D-**

**Line Item 1**

**Property Tax Statement  
(Mortgage Company)**

**Page 1-front and back**



**2015**  
**PROPERTY TAX STATEMENT**

**ACCOUNT NUMBER**

[REDACTED]

**KENNETH L. MAUN**  
**TAX ASSESSOR COLLECTOR**  
**COLLIN COUNTY**

P.O. BOX 8046  
MCKINNEY, TEXAS 75070-8046  
972-547-5020  
METRO 972-424-1460 EXT. 5020

**OFFICE LOCATIONS**

2300 BLOOMDALE RD. STE. 2324  
MCKINNEY, TX 75071

920 E. PARK BLVD. STE. 100  
PLANO, TX 75034

6101 FRISCO SQUARE BLVD. STE. 2000  
FRISCO, TX 75034

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND YOU OCCUPY THE PROPERTY DESCRIBED IN THIS DOCUMENT AS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

**OWNER NAME AND ADDRESS**

[REDACTED]

**PROPERTY DESCRIPTION**

[REDACTED]

**SITUS:** [REDACTED]

**OWNER ID:** [REDACTED]

**EXEMPTIONS:**

Property Class	Land Value	Agricultural Exclusion	Improvement Value	Personal Property	Appraised Value (Market)	Homestead Cap	Assessed Value
Qualifying	0	0	0	0	0	0	0
Non Qualifying	4,758,320	0	20,923,625	0	25,681,945	0	25,681,945
Agricultural	0	0	0	0	0	0	0
Total	4,758,320	0	20,923,625	0	25,681,945	0	25,681,945

TAXING ENTITY	ASSESSED VALUE	EXEMPTION AMOUNT	TAXABLE VALUE	TAX RATE	YEAR	CEILING AMOUNT	TAXES BY ENTITY
COLLIN COUNTY	25,681,945	0	25,681,945	0.225000			57,784.38
PLANO CITY	25,681,945	0	25,681,945	0.488600			125,481.98
COLLIN COLLEGE	25,681,945	0	25,681,945	0.081960			21,048.92
PLANO ISD	25,681,945	0	25,681,945	1.439000			369,563.19

Visit [www.certifiedpayments.net](http://www.certifiedpayments.net) to pay by electronic check or credit card  
Bureau code # 5475020



Convenience fee charged.  
or call Certified Payments at 1-877-264-7533  
credit card only - no electronic checks by phone

Only persons already receiving an over 65, disabled veteran or disabled person exemption may pay current taxes on their resident homestead in four installments without penalty or interest if their first payment is made by **January 31st**. Remaining three installments due dates are **March 31st, May 31st, and July 31st**.

**1st INSTALLMENT**

[REDACTED]

**TOTAL TAXES DUE NOW**

**\$573,878.47**

**DELINQUENT 2/1/2016**

YOUR CHECK WILL BE CONVERTED INTO AN ELECTRONIC FUND TRANSFER.

**DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT.**

IF THERE IS AN ERROR IN OWNERSHIP, EXEMPTIONS OR JURISDICTIONS, YOU MUST CONTACT THE **CENTRAL APPRAISAL DISTRICT**.

**ACCOUNT NUMBER**

[REDACTED]

Taxes will be delinquent on Feb. 1, 2016  
Unpaid tax balance will incur the following penalty & interest.  
Amount due if paid in:

**TOTAL TAXES DUE DELINQUENT Feb. 1, 2016**

**\$573,878.47**

**MORTGAGE COMPANY**

**MORTGAGE NO.**

**LOAN NO.**

[REDACTED]

[REDACTED]

[REDACTED]

**FEBRUARY + 7%**

614,049.96

**MARCH + 9%**

625,527.53

MAKE CHECK PAYABLE TO:

**KENNETH L. MAUN**  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
P.O. BOX 8046  
MCKINNEY, TX 75070-8046

[REDACTED]

PLEASE MAKE ADDRESS CORRECTIONS HERE.



20150R388000A0010100573878470061404996006255275300000000000001



## INFORMATION ON TAXES

Assessment Ratio 100%

Property taxes are the primary sources of local government revenue in Texas. Your Tax Assessor Collector in Collin County will be collecting Ad Valorem, or property taxes, for the following entities: Collin County, Collin County Community College District, the Cities of Allen, Anna, Blue Ridge, Celina, Fairview, Farmersville, Frisco, Josephine, Lavon, Lowry Crossing, Lucas, McKinney, Melissa, Murphy, Nevada, New Hope, Parker, Plano, Princeton, Prosper, Richardson, Sachse, St. Paul, Weston, and Wylie, Seis Lagos Utility District, the Allen, Anna, Blue Ridge, Celina, Community, Farmersville, Frisco, Lovejoy, McKinney, Melissa, Plano, Princeton, Prosper and Wylie Independent School Districts, and possibly others.

YOUR CAREFUL REVIEW OF TAXPAYER INFORMATION CONTAINED IN THIS STATEMENT COULD HELP TO ELIMINATE MANY TAX PROBLEMS IN THE FUTURE.

You have from October to January 31 of the next year to pay your taxes without penalty or interest. You will be charged penalty and interest on February 1.

**ANY ERRORS OR DISCREPANCIES IN LEGAL DESCRIPTION, NAME, ADDRESS OR QUESTIONS CONCERNING VALUE SHOULD BE REFERRED TO THE CENTRAL APPRAISAL DISTRICT.**

If your taxes should be paid by a mortgage company, your copy of the statement should indicate "Property Tax Notification". If your statement is an original copy, please forward this statement to your mortgage company with your loan number.

If you bought other property and did not receive a tax statement, or sold this property and should not have received the statement, please contact this office immediately. If you own multiple properties and have not received all your statements... NOW is the time to INQUIRE about your OTHER STATEMENTS.

Penalty and interest are imposed at the statutory rate of 12% penalty and 12% per year interest on unpaid taxes WHETHER OR NOT THE TAXPAYER RECEIVED THE TAX BILL. By July 1st, a delinquent taxpayer will have incurred 18% penalty and interest and up to 20% for attorney fees and runs a risk of being sued or having his/her property seized after that time.

**THE TAX COLLECTOR DOES NOT HAVE ANY LEGAL AUTHORITY TO FORGIVE ANY PENALTY OR INTEREST CHARGE ON AN UNPAID TAX, NO MATTER HOW GOOD YOUR REASON IS FOR NOT PAYING.**

On real property (land and buildings), the current owner can be held liable for any unpaid taxes on the land, even for years before he/she bought the property. The new owner is liable for the entire year's tax to the Tax Collector, even if that person bought the property during the year and had their tax prorated with the seller at the time of closing.

On personal property (business inventory, mobile homes, equipment, airplanes, etc) the person who owned the property on January 1 of the tax year is personally liable for the entire year's tax, even if he/she sold the property during the year.

THE CENTRAL APPRAISAL DISTRICT is a **SEPARATE** local agency and is not part of County government or the Collin County Tax Office. The CAD decides what property is to be taxed, its appraised value, whether to grant exemptions, who the taxable owner is, his/her address, and what taxing jurisdictions tax the property.

**HOMESTEAD CAP VALUE:** In November 1997, Texas voters approved a constitutional amendment to limit increases in the appraised value of residence homestead to 10 percent annually. The new law, Property Tax Code Section 23.23, provides that the appraised value of a residence homestead beginning in the 1998 tax year may not exceed the lesser of: (1) the market value of the property; or (2) the sum of: (A) 10 percent of the appraised value of the property for the last year in which the property was appraised for taxation times the number of years since the property was last appraised; (B) the appraised value of the property for the last year in which the property was appraised; and (C) the market value of all new improvements to the property.

### **OVER AGE 65/DISABILITY INSTALLMENT PAYMENT OF HOMESTEAD TAXES OPTION**

**To take advantage of this option a qualified individual who occupies a residence homestead must pay at least one fourth of his taxes by Jan. 31. The remaining taxes must be paid in three equal installments due by March 31<sup>st</sup>, May 31<sup>st</sup>, and July 31<sup>st</sup>. If the individual fails to make a payment before the installment date listed above, the unpaid amount is delinquent and incurs a penalty of 6 percent and interest as provided in Section 31.031 S.P.T.C**

**If you have a mortgage company you will need to make them aware of your intent to participate in the OA65/Disabled person installment payment option.**

### **EXEMPTIONS:**

CAREFULLY REVIEW YOUR EXEMPTIONS ON FACE OF STATEMENT. IF THE EXEMPTIONS SHOWN ARE NOT ACCURATE, OR IF YOU HAVE ANY QUESTIONS ABOUT YOUR EXEMPTIONS, **CALL THE CENTRAL APPRAISAL DISTRICT IMMEDIATELY.** MARKET VALUE WILL BE REDUCED BY EXEMPTIONS WHERE APPROPRIATE AND APPROVED TO OBTAIN TAXABLE VALUE.

POSSIBLE EXEMPTIONS (AS THEY MAY APPEAR ON STATEMENT):

1. **HS001 - HOMESTEAD.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY. NOTE: THE COLLIN COUNTY COMMUNITY COLLEGE DISTRICT DOES NOT OFFER THIS EXEMPTION AT THIS TIME.
2. **OV003 - OVER AGE 65.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY.
3. **DP005 - DISABLED.** THIS EXEMPTION WILL BE RECOGNIZED AS AUTHORIZED BY ANY TAXING ENTITY.
4. **DV001-DV004 - VETERAN.** THIS IS A STATE MANDATED EXEMPTION. THE EXEMPTION ALLOWED IS BASED UPON THE PERCENTAGE OF DISABILITY CERTIFIED BY THE VETERANS ADMINISTRATION, TO A MAXIMUM OF \$12,000.

**WHEN YOU PROVIDE A CHECK AS PAYMENT, YOU AUTHORIZE US EITHER TO USE INFORMATION FROM YOUR CHECK TO MAKE A ONE-TIME ELECTRONIC FUND TRANSFER FROM YOUR ACCOUNT OR TO PROCESS THE PAYMENT AS A CHECK TRANSACTION. WHEN WE USE INFORMATION FROM YOUR CHECK TO MAKE AN ELECTRONIC FUND TRANSFER, FUNDS MAY BE WITHDRAWN FROM YOUR ACCOUNT AS SOON AS THE SAME DAY WE RECEIVE YOUR PAYMENTS, AND YOU WILL NOT RECEIVE YOUR CHECK BACK FROM YOUR FINANCIAL INSTITUTION.**

**BE SURE TO ENCLOSE THE STUB PORTION OF YOUR TAX STATEMENT WHEN YOU PAY BY MAIL. SEND CHECK OR MONEY ORDER. CREDIT CARDS MAY BE PROCESSED THROUGH CERTIFIED PAYMENTS, INC. THERE WILL BE A NOMINAL FEE FOR THIS SERVICE. SEE FRONT OF THIS STATEMENT. DO NOT SEND CASH THROUGH THE MAIL. IF YOU WISH TO PAY IN PERSON, YOU MAY PAY AT THE TAX OFFICE (ADDRESSES LISTED ON FRONT PAGE). BE SURE TO WRITE YOUR ACCOUNT NUMBER ON YOUR CHECK TO INSURE PROPER CREDIT.**

**Attachment E-**

**Line Item 1**

**Property Tax Statement**

**(Mortgage Company)**

**Page 2-front and back**



**Information about Property Values and Taxes**  
From the files of Kenneth L. Maun, Tax Assessor Collector of Collin County

The following information show what values, exemptions, tax rates and tax levies have been on this property for the last six years for each entity by whom taxed, and the percentage change from the prior year. A five year comparison is just below that.

ACCOUNT HISTORY								Account #	
Tax Year	Appraised Value	Appraisal % Chg	Exemption Amount	Taxable Value	Value % Chg	Tax Rate Per \$100	Rate % Chg	Tax	Tax % Chg
<b>COLLIN COLLEGE</b>									
2015	25,681,945	5.25%	0	25,681,945	5.25%	0.081960	0.00%	\$21,048.92	5.25%
2014	24,400,000	6.81%	0	24,400,000	6.81%	0.081960	-2.01%	\$19,998.24	4.67%
2013	22,842,200	6.24%	0	22,842,200	6.24%	0.083643	-3.08%	\$19,105.90	2.97%
2012	21,500,000	10.25%	0	21,500,000	10.25%	0.086299	0.00%	\$18,554.28	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	0.086300	0.00%	\$16,828.50	12.82%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.086300	0.00%	\$14,915.66	0.00%
<b>5 YR COMPARISON</b>									
2015	25,681,945	48.59%	0	25,681,945	48.59%	0.081960	-5.03%	\$21,048.92	41.11%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.086300	0.00%	\$14,915.66	0.00%
<b>COLLIN COUNTY</b>									
2015	25,681,945	5.25%	0	25,681,945	5.25%	0.225000	-4.26%	\$57,784.38	0.77%
2014	24,400,000	6.81%	0	24,400,000	6.81%	0.235000	-1.05%	\$57,340.00	5.69%
2013	22,842,200	6.24%	0	22,842,200	6.24%	0.237500	-1.04%	\$54,250.22	5.13%
2012	21,500,000	10.25%	0	21,500,000	10.25%	0.240000	0.00%	\$51,600.00	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	0.240000	0.00%	\$46,800.00	12.82%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.240000	0.00%	\$41,480.41	0.00%
<b>5 YR COMPARISON</b>									
2015	25,681,945	48.59%	0	25,681,945	48.59%	0.225000	-6.25%	\$57,784.38	39.30%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.240000	0.00%	\$41,480.41	0.00%
<b>PLANO CITY</b>									
2015	25,681,945	5.25%	0	25,681,945	5.25%	0.488600	0.00%	\$125,481.98	5.25%
2014	24,400,000	6.81%	0	24,400,000	6.81%	0.488600	0.00%	\$119,218.40	6.81%
2013	22,842,200	6.24%	0	22,842,200	6.24%	0.488600	0.00%	\$111,606.99	6.24%
2012	21,500,000	10.25%	0	21,500,000	10.25%	0.488600	0.00%	\$105,049.00	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	0.488600	0.00%	\$95,277.00	12.82%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.488600	0.00%	\$84,447.20	0.00%
<b>5 YR COMPARISON</b>									
2015	25,681,945	48.59%	0	25,681,945	48.59%	0.488600	0.00%	\$125,481.98	48.59%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.488600	0.00%	\$84,447.20	0.00%
<b>PLANO ISD</b>									
2015	25,681,945	5.25%	0	25,681,945	5.25%	1.439000	-0.62%	\$369,563.19	4.59%
2014	24,400,000	6.81%	0	24,400,000	6.81%	1.448000	-0.34%	\$353,312.00	6.45%
2013	22,842,200	6.24%	0	22,842,200	6.24%	1.453000	5.80%	\$331,897.17	12.40%
2012	21,500,000	10.25%	0	21,500,000	10.25%	1.373400	0.00%	\$295,281.00	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	1.373400	1.48%	\$267,813.00	14.49%
2010	17,283,503	0.00%	0	17,283,503	0.00%	1.353400	0.00%	\$233,914.93	0.00%
<b>5 YR COMPARISON</b>									
2015	25,681,945	48.59%	0	25,681,945	48.59%	1.439000	6.32%	\$369,563.19	57.99%
2010	17,283,503	0.00%	0	17,283,503	0.00%	1.353400	0.00%	\$233,914.93	0.00%

**MAINTENANCE AND DEBT  
RATE INFORMATION**

TAX YEAR	MAINT RATE	DEBT RATE
2015	1.170000	0.269000
2014	1.170000	0.278000

PLANO ISD

NOTE: Maint Rate = Maintenance and Operations Tax rate and Debt Rate = Interest and Sinking Tax Rate Changes in exemptions or freezes can make a big change in the percentage calculations. Data is not shown where information was not available. The most common reason the information was not available is that the County Tax Office was not collecting for the entity for those years or the tax record did not exist in the prior years.



## **APPRAISAL DISTRICT INFORMATION**

### **COLLIN CENTRAL APPRAISAL DISTRICT**

250 W. Eldorado Parkway  
McKinney, TX 75069-8023  
Phone: 469-742-9200  
Fax: 469-742-9207  
Web site: [www.collincad.org](http://www.collincad.org)

### **DENTON CENTRAL APPRAISAL DISTRICT**

3911 Morse Street  
P O Box 2816  
Denton TX 76208-2816  
Phone: 940-349-3800  
Fax: 940-349-3801  
Web site: [www.dentoncad.com](http://www.dentoncad.com)

### **FANNIN CENTRAL APPRAISAL DISTRICT**

831 W. State Hwy. 56  
Bonham, TX 75418-8604  
Phone: 903-583-8701  
Fax: 903-583-8015  
Web site: [www.fannincad.org](http://www.fannincad.org)

### **HUNT CENTRAL APPRAISAL DISTRICT**

4801 King St.  
P O Box 1339  
Greenville, TX 75403-1339  
Phone: 903-454-3510  
Fax: 903-454-4160  
Web site: [www.hunt-cad.org](http://www.hunt-cad.org)

### **GRAYSON CENTRAL APPRAISAL DISTRICT**

205 N. Travis Street  
Sherman, TX 75090-5922  
Phone: 903-893-9673  
Fax: 903-892-3835  
Web site: [www.graysonappraisal.org](http://www.graysonappraisal.org)

### **DALLAS CENTRAL APPRAISAL DISTRICT**

2949 N. Stemmons Frwy.  
Dallas, TX 75247-6195  
Phone: 214-631-0910  
Web site: [www.dallascad.org](http://www.dallascad.org)

### **ROCKWALL CENTRAL APPRAISAL DISTRICT**

841 Justin Rd.  
Rockwall, TX 75087-4842  
Phone: 972-771-2034  
Fax: 972-771-6871  
Web site: [www.rockwallcad.com](http://www.rockwallcad.com)

**Attachment F-**  
**Line Item 2**  
**February Statement**  
**(Blue)**





0367

**DELINQUENT TAX STATEMENT  
KENNETH L. MAUN**

PAGE 1 of 2

TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
2300 BLOOMDALE RD, STE 2324  
P.O.BOX 8046  
McKINNEY, TX 75070-8046  
(972) 547-5020  
METRO (972) 424-1460 EXT 5020

Date: 02-10-2016

Legal Desc: [REDACTED]

Account#: [REDACTED]

Address: [REDACTED]

Parcel: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN FEBRUARY		IF PAID IN MARCH		IF PAID IN APRIL	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2009	COMMUNITY ISD	16.30	19.89	36.19	20.08	36.38	20.29	36.59
2010	COMMUNITY ISD	2,081.04	2,239.19	4,320.23	2,264.16	4,345.20	2,289.14	4,370.18
2011	COMMUNITY ISD	2,081.04	1,939.52	4,020.56	1,964.50	4,045.54	1,989.47	4,070.51
2012	COLLIN COLLEGE	120.13	94.67	214.80	96.11	216.24	97.55	217.68
2012	COLLIN COUNTY	334.08	263.26	597.34	267.26	601.34	271.27	605.35
2012	COMMUNITY ISD	2,262.00	1,782.46	4,044.46	1,809.60	4,071.60	1,836.74	4,098.74
2012	JOSEPHINE CITY	273.14	194.89	468.03	198.03	471.17	201.17	474.31
2013	COLLIN COLLEGE	116.43	74.98	191.41	76.37	192.80	77.78	194.21
2013	COLLIN COUNTY	330.60	212.90	543.50	216.88	547.48	220.84	551.44
2013	COMMUNITY ISD	2,262.00	1,456.73	3,718.73	1,483.87	3,745.87	1,511.02	3,773.02
2013	JOSEPHINE CITY	282.73	162.71	445.44	165.97	448.70	169.22	451.95
2014	COLLIN COLLEGE	114.09	57.04	171.13	58.41	172.50	59.78	173.87
2014	COLLIN COUNTY	327.12	163.56	490.68	167.48	494.60	171.41	498.53
2014	COMMUNITY ISD	2,248.08	1,124.04	3,372.12	1,151.02	3,399.10	1,177.99	3,426.07
2014	JOSEPHINE CITY	294.71	128.94	423.65	132.33	427.04	135.72	430.43

continued on next page

IF THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE COLLIN COUNTY TAX OFFICE REGARDING A RIGHT YOU MAY HAVE TO ENTER INTO AN INSTALLMENT AGREEMENT DIRECTLY WITH THE COLLIN COUNTY TAX OFFICE FOR THE PAYMENT OF THESE TAXES.  
IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

**THE TAXES ON THIS PROPERTY ARE DELINQUENT. THE PROPERTY IS SUBJECT TO A LIEN FOR THE DELINQUENT TAXES. IF THE DELINQUENT TAXES ARE NOT PAID THE LIEN MAY BE FORECLOSED ON.**

-----  
PLEASE RETURN BOTTOM PORTION WITH YOUR PAYMENT  
-----

**PER SECT 33.11 OF THE TEXAS  
PROP TAX CODE, AN ADDITIONAL  
PENALTY OF 15-20% MAY BE  
ADDED ON APRIL 1ST**

Account Number	Month Paid	Amount Paid
[REDACTED]	<b>FEBRUARY</b>	<b>\$26,243.46</b>
	<b>MARCH</b>	<b>\$26,460.28</b>
	<b>APRIL</b>	<b>\$26,677.15</b>
Amount of Your Check		<b>\$</b>

IF THERE IS AN ERROR IN OWNERSHIP OR JURISDICTION, YOU MUST  
CONTACT THE CENTRAL APPRAISAL DISTRICT FOR CORRECTIONS.

**MAKE CHECK PAYABLE TO:**  
KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
P.O.BOX 8046  
McKINNEY, TX 75070-8046



00000R62280000080100026243460002646028000266771500000000000001





1368

Account Number: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN FEBRUARY		IF PAID IN MARCH		IF PAID IN APRIL	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2015	COLLIN COLLEGE	114.09	7.99	122.08	10.27	124.36	12.55	126.64
2015	COLLIN COUNTY	313.20	21.92	335.12	28.18	341.38	34.46	347.66
2015	COMMUNITY ISD	2,262.00	158.34	2,420.34	203.58	2,465.58	248.82	2,510.82
2015	JOSEPHINE CITY	287.52	20.13	307.65	25.88	313.40	31.63	319.15
TOTAL AMOUNT DUE				\$26,243.46		\$26,460.28		\$26,677.15

**Attachment G-**  
**Line Item 3**  
**May Statement**  
**(Pink) Page 1**





1099

**DELINQUENT TAX STATEMENT****KENNETH L. MAUN**

PAGE 1 of 1

TAX ASSESSOR COLLECTOR  
 COLLIN COUNTY  
 2300 BLOOMDALE RD, STE 2324  
 P.O. BOX 8046  
 MCKINNEY, TX 75070-8046  
 (972) 547-5020  
 METRO (972) 424-1460 EXT 5020

Date: 05-08-2015

Legal Desc: [REDACTED]

Account#: [REDACTED]

Parcel: [REDACTED]

Address: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN MAY		IF PAID IN JUNE		IF PAID IN JULY	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2014	CELINA CITY	17.74	5.30	23.04	5.72	23.46	6.34	24.08
2014	CELINA ISD	45.10	16.06	61.16	17.14	62.24	18.77	63.87
2014	COLLIN COLLEGE	2.26	0.80	3.06	0.86	3.12	0.94	3.20
2014	COLLIN COUNTY	6.47	2.30	8.77	2.46	8.93	2.70	9.17
<b>TOTAL AMOUNT DUE</b>				<b>\$96.03</b>		<b>\$97.75</b>		<b>\$100.32</b>

IF THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE COLLIN COUNTY TAX OFFICE REGARDING A RIGHT YOU MAY HAVE TO ENTER INTO AN INSTALLMENT AGREEMENT DIRECTLY WITH THE COLLIN COUNTY TAX OFFICE FOR THE PAYMENT OF THESE TAXES.  
 IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

**THE TAXES ON THIS PROPERTY ARE DELINQUENT. THE PROPERTY IS SUBJECT TO A LIEN FOR THE DELINQUENT TAXES. IF THE DELINQUENT TAXES ARE NOT PAID THE LIEN MAY BE FORECLOSED ON.**

-----  
 PLEASE RETURN BOTTOM PORTION WITH YOUR PAYMENT  
 -----

Account Number	Month Paid	Amount Paid
[REDACTED]	<b>MAY</b>	<b>\$96.03</b>
	<b>JUNE</b>	<b>\$97.75</b>
	<b>JULY</b>	<b>\$100.32</b>
Amount of Your Check		<b>\$</b>

IF THERE IS AN ERROR IN OWNERSHIP OR JURISDICTION, YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT FOR CORRECTIONS.

**MAKE CHECK PAYABLE TO:**  
 KENNETH L. MAUN  
 TAX ASSESSOR COLLECTOR  
 COLLIN COUNTY  
 P.O. BOX 8046  
 MCKINNEY, TX 75070-8046

46-1

5B



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**Attachment H-**  
**Line Item 3**  
**May Statement**  
**Page 2**





**KENNETH L. MAUN**  
Tax Assessor Collector  
Collin County  
2300 Bloomdale Rd., Suite 2324  
P. O. Box 8046  
McKinney, Texas 75070-8046  
972-547-5020  
FAX 972-547-5053  
Metro 972-424-1460 Ext. 5020

Collin County Property Owner:

May 11, 2015

The enclosed delinquent tax statement indicates these taxes were not paid in full by April 30, 2015. If payment was made prior to April 30th, please call our office so we may review our records.

Should your mortgage company pay your taxes, please contact them. If they are at fault for late payment, I'm sure they would want to assist in the payment of any necessary penalty and interest.

After January 31, 2015, all 2014 taxes remaining unpaid are considered delinquent. Delinquent taxes require penalty and interest totaling 13% if paid in May, and 15% if paid in June. The penalty and interest percentage continues to increase until delinquent taxes are paid.

Should the 2014 taxes still be due on July 1, 2015, an additional 15% - 20% will be charged (resulting in a total additional charge of 33% - 38%). For business personal property accounts this can happen as early as April 1<sup>st</sup>. This additional 15% - 20% collection will help pay the attorney fees for assisting in the collection of delinquent taxes. These penalties and interest are specified in the Texas Property Tax Code and cannot be waived.

I would appreciate your help in the collection of these taxes. Uncollected taxes cause owners of Collin County property to carry an extra burden.

Thank you for your help,

Kenneth L. Maun  
Tax Assessor Collector



**Attachment I-**  
**Line Item 4**  
**July Statement**  
**(Mint Green)**  
**Attorney**

# DELINQUENT TAX STATEMENT

**KENNETH L. MAUN**  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
2300 BLOOMDALE RD., STE 2324  
P.O. BOX 8046  
McKINNEY, TX 75070-8046  
(972) 547-5020  
METRO (972) 424-1460 EXT. 5020

Date: 07-11-2012

Account#:

[illegible]

PLEASE DETACH AND RETURN BOTTOM PORTION WITH YOUR PAYMENT

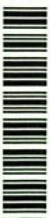
Note: An additional penalty of 15%-20% is added to all unpaid taxes on July 1. This penalty will be used solely to compensate the delinquent tax attorney. The above is from section 33.07 of the Texas Property Tax Code.

IF THERE IS AN ERROR IN OWNERSHIP, OR JURISDICTION, YOU MUST  
CONTACT THE CENTRAL APPRAISAL DISTRICT OF COLLIN COUNTY AT (469)  
742-9200 OR (866) 467-1110 FOR CORRECTIONS.

[illegible]

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

MAKE CHECKS PAYABLE TO:  
KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
P.O. BOX 8046  
McKINNEY TX 75070-8046



00000000B/U/ 005+08D1000000A1 54:0000000A0/ 50000000077000000000000000

**Attachment J-**  
**#9 Non-Standard**  
**Return Envelope**

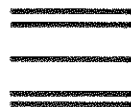
Name

Address

City

State

Zip



Postage  
Required  
Post Office will  
not deliver  
without proper  
postage.

KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
P.O. BOX 8046  
MCKINNEY TX 75070-8046



**Attachment K-**  
**#10 Window Mailing**  
**Envelopes**  
**(blue) front**

**Tax Assessor Collector  
Collin County  
2300 Bloomdale Rd., Suite 2324  
P.O. Box 8046  
McKinney, Texas 75070-8046**

Presorted First Class  
U.S. Postage  
**PAID**  
QIM

**IMPORTANT • PROPERTY TAX STATEMENT ENCLOSED**

750708046

**Attachment L-**  
**#10 Window Mailing**  
**Envelopes**  
**(blue) back**

# Tax Assessor Collector Offices of Collin County

PROPERTY TAX ONLY	MOTOR VEHICLE ONLY	SUB-OFFICES
<p>McKinney 2300 Bloomdale Rd., Ste. 2324 P.O. Box 8046</p> <p>McKinney, Texas 75070-8046 Open Monday Thru Friday 8:00 a.m. to 5:00 p.m. Thursdays 8:00 a.m. to 7:00 p.m. 972-547-5020</p> <p>Metro 1-972-424-1460 ext. 5020</p>	<p>McKinney 2300 Bloomdale Rd., Ste. 2302 P.O. Box 8006</p> <p>McKinney, Texas 75070-8006 Open Monday Thru Friday 8:00 a.m. to 5:00 p.m. Thursdays 8:00 a.m. to 7:00 p.m. 972-547-5014</p> <p>Metro 1-972-424-1460 ext. 5014</p>	<p>Frisco 6101 Frisco Sq. Blvd., Ste. 2000 Frisco, Texas 75034</p> <p>Open Monday Thru Friday 8:00 a.m. to 5:00 p.m. Wednesdays 8:00 a.m. to 7:00 p.m. 469-362-5800</p> <p>Plano 920 E. Park Blvd., Ste. 100 Plano, Texas 75074</p> <p>Open Monday Thru Friday 8:00 a.m. to 5:00 p.m. Tuesdays 8:00 a.m. to 7:00 p.m. 972-881-3014</p>



## **INFORMATION REGARDING CONFLICT OF INTEREST QUESTIONNAIRE**

During the 79<sup>th</sup> Legislative Session, House Bill 914 was signed into law effective September 1, 2015, which added Chapter 176 to the Texas Local Government Code. Recent changes have been made to Chapter 176 pursuant to HB23, which passed the 84<sup>th</sup> Legislative Session. Chapter 176 mandates the public disclosure of certain information concerning persons doing business or seeking to do business with Collin County, including family, business, and financial relationships such persons may have with Collin County officers or employees involved in the planning, recommending, selecting and contracting of a vendor for this procurement.

For a copy of Form CIQ and CIS:

[http://www.ethics.state.tx.us/filinginfo/conflict\\_forms.htm](http://www.ethics.state.tx.us/filinginfo/conflict_forms.htm)

The vendor acknowledges by doing business or seeking to do business with Collin County that he/she has been notified of the requirements under Chapter 176 of the Texas Local Government Code and that he/she is solely responsible for complying with the terms and conditions therein. Furthermore, any individual or business entity seeking to do business with Collin County who does not comply with this practice may risk award consideration of any County contract.

For a listing of current Collin County Officers:

<http://www.collincountytexas.gov/government/Pages/officials.aspx>

The following County employees will be involved in the planning, recommending, selecting, and contracting for the attached procurement:

**Department/Evaluation Team:**

Kenneth Maun, Tax Assessor  
Laura Boatright, Chief Deputy Clerk  
Sandy Cline, Senior Clerk  
Karen Thier, Property Tax Technician

**Purchasing:**

Michalyn Rains, CPPB, CPPO – Purchasing Agent  
Sara Hoglund, CPPB – Asst. Purchasing Agent  
Courtney Wilkerson, Senior Buyer

**Commissioners' Court:**

Keith Self – County Judge  
Susan Fletcher – Commissioner Precinct No. 1  
Cheryl Williams – Commissioner Precinct No. 2  
Chris Hill – Commissioner Precinct No. 3  
Duncan Webb – Commissioner Precinct No. 4

# CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

**This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.**

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

## OFFICE USE ONLY

Date Received

**1 Name of vendor who has a business relationship with local governmental entity.**

**2** ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

**3 Name of local government officer about whom the information is being disclosed.**

\_\_\_\_\_  
Name of Officer

**4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

**5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

**6** ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

**7**

\_\_\_\_\_  
Signature of vendor doing business with the governmental entity

\_\_\_\_\_  
Date

## **CONFLICT OF INTEREST QUESTIONNAIRE**

### **For vendor doing business with local governmental entity**

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

**Local Government Code § 176.001(1-a):** "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

**Local Government Code § 176.003(a)(2)(A) and (B):**

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

\*\*\*

- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;  
or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

**Local Government Code § 176.006(a) and (a-1)**

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

- (a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

## Request for Taxpayer Identification Number and Certification

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

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification; check only <b>one</b> of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <b>Note.</b> For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> 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) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
	6 City, state, and ZIP code	
7 List account number(s) here (optional)		

<b>Part I Taxpayer Identification Number (TIN)</b> 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 Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3. <b>Note.</b> If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.	<b>Social security number</b> [ ][ ][ ] - [ ][ ] - [ ][ ][ ][ ][ ] <b>or</b> <b>Employer identification number</b> [ ][ ] - [ ][ ][ ][ ][ ][ ][ ][ ]
---	--

<b>Part II Certification</b> 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. <b>Certification instructions.</b> 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 on page 3.	<b>Signature of U.S. person ▶</b>  <b>Date ▶</b>
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### General Instructions

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

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

### 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-INT (interest earned or paid)
- 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? on page 2.*

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.