



Proposal for:

## Yamhill County Tax Collector, Oregon

Tax Statement Mailing - Approximate 43,000

### SPOKANE HEADQUARTERS

1405 N ASH ST  
SPOKANE WA 99201-2805  
PHONE: 509-326-7475  
FAX: 888-828-4659  
TOLL FREE: 800-301-1347

### HAWAII BRANCH OFFICE

39 MALUNIU AVE STE 201  
KAILUA HI 96734-2359  
PHONE: 800-301-1347  
FAX: 888-828-4659

### INDIANA BRANCH OFFICE

PO BOX 471  
LAFAYETTE IN 47902-0471  
PHONE: 800-301-1347  
FAX: 888-828-4659

This proposal includes the following static print items:

1. #10 Window envelope prints black face on 24# ww = 2.2 cents ea.
2. 8 ½ x 11 tax form provided by State of Oregon
3. #9 reply envelope printed black on 24# blue wove- 2.8 cents each or provided from the State of Oregon
4. 8 ½ x 11 insert printed on 24# white bond
  - a. Black ink two sides - 2.7 cents each
  - b. Two colors two sides - 3.2 cents each
5. 9 x 12 window envelope - used only for 5+ notices - 22 cents each

Tax Statement printing and Mail processing - Description:

- CASS Certify to validate addresses and process through NCOA to comply with USPS Move update and report defective addresses to customer via Excel spread sheet.
- Laser print variable information to face only of tax statements.
- Fold and insert statement into #10 window envelope.
- Add one #9 reply envelope
- Seal and presort for best automation discount postage.
- Group identical name and address statements into one envelope.
- Quality check and deliver to the USPS bulk mail facility.

Approximate 43,000 parcels = 9.7 cents each + automation postage

- Automation postage will range from 37.8 to 43.5 cents each depending on zip sort.
- The larger 9 x 12 window envelope will be used for any mail packages where the thickness exceeds ¼" on #10 envelope.
- One time setup of \$700 - waived with agreement by 5/15/15
- Printed prices are valid for at least 60 days
- One PDF file with a copy of all statements will be provided at no extra charge.

Jim Cote'  
President  
May 8, 2015

Accepted

Date

5/27/2015

B.O. 112-21



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Proposal for:

## Yamhill County, Oregon

### Description of eNoticesOnline Services at Product Launch:

- Online Presentment of PDF statement - a replica of what is mailed
- E-mail notification to owner that statement is ready for viewing
- One Code Authentication for multiple parcels when name and address are identical between two or more parcels.
- Secure access
- Immediate access to eNotice(s) upon registration – no waiting!
- Seamless Ownership Changes ensures new owners receive their statements.
- One Data Upload takes care of both your print mailing and your eNotices
- Robust Report Generation – detailing who accessed, when, how many times, etc.
- Email generation can be initiated by the County to email blast those who have signed up – no extra charge!
- Parcel look up for registering
- Payment portal to your vendor or to use The Master's Touch vendor

### Description of eNoticesOnline Services Available in Future Release:

- Mobile Access

### Description of eNoticesOnline Pricing Structure:

1. \$0.12 per statement posted to eNoticesOnline.com
  - a. PDFs of every Statement available
  - b. A report of delivery method used for all parcels
2. \$250.00 per PDF upload
  - a. Covers processing, upload and storage for all PDF's in a single upload file. At least two years' worth of online notices will remain available for viewing.
  - b. One year agreement – renewable annually.

### One Time Setup:

One time set up fee of \$450.00

Thank you for this opportunity!

Jim Cote'  
President  
February 25, 2015

Accepted: Scott Wayland  
Title: Assessor  
Date: 5/27/2015



Hello,

Thank you for choosing The Master's Touch, LLC to provide our print and mail services for your upcoming mailing. We are grateful to have the opportunity to serve you and look forward to getting started. In order to help us insure a smooth and accurate mailing, we are asking for your help in giving us the direction we need.

The information we are including here will guide you through our process and will provide those target dates which will help all of us to stay on track. So that we can accurately prepare for your mailing and schedule our calendar accordingly, we are including a simple checklist for you to fill out and return to us at your earliest convenience. We ask that you complete this to the best of your ability, especially in describing the mail piece and all of the pieces that may go inside the envelope. This information will be vital to us to insure an accurate and complete mailing.

**Even if you have mailed with us before, it is important that you consider the timelines we have noted in the form below, and especially if you will have any data formatting changes. You can skip the sample data section only if your data file will be absolutely identical to the previous one we processed for you.**

The following page is a fill-in PDF which can be completed and sent back to us electronically. After thoroughly reviewing and completing this PDF checklist, please e-mail it back to us at the e-mail noted below. Be sure to CC the one who sent this to you. You can also send this filled out packet in an envelope along with printed samples of your statements, envelopes and inserts (if appropriate). Another option is faxing it to us using the contact information noted below.

We treasure the confidence you have placed in The Master's Touch, LLC to serve you and want to be certain that you are completely comfortable with the process. So, if you have any other questions whatsoever, do not hesitate to contact us. Thank you so much. Your business is greatly appreciated!

Thanks again,

Contact information: Phone: 509-326-7475 or 800-301-1347. Fax:509-326-7214

Graphic Design - Art set up: [gd@themastertouch.com](mailto:gd@themastertouch.com)

Customer Service - Printed Stock and Envelopes: [custsvc@themastertouch.com](mailto:custsvc@themastertouch.com)

Management/Data Set up/ I.T.: [pm@themastertouch.com](mailto:pm@themastertouch.com)



## IMPORTANT PLEASE READ

One Very Important Note: In order to avoid any delay and possible surcharge, we will need to have your estimated postage in hand prior to mailing. **Let us know immediately if you need an invoice from our accounting department for estimated postage.** Otherwise, you can send us postage based on the following rate category you will be using:

1. Non-profit - figure 16 cents per piece
2. Standard A - figure 28 cents per piece
3. First Class Postcard - figure 26 cents per piece
4. First Class letter - figure 39 cents per piece

If your mail piece is more than one ounce, a catalog/flat, is odd shaped or irregular in any way, please contact us as it may require different postal rates .

If your estimated postage is short of the actual amount needed, we will notify you of the difference. If time permits and the postage difference is greater than \$500.00, we may request you send us the difference prior to mailing. If The Master's Touch, LLC covers the difference, the postage will be due upon receipt of our invoice.

If your estimated postage exceeds the actual amount needed, we will apply the excess to the printing and mailing charges unless you direct us differently.

We do not mark-up postage, since it is a transaction between you and the U.S. Postal Service. We simply deliver your postage money to them. If you prefer we prepay your postage for you, we may be able to do so, however there would be a 3% fee added to the final postage due. This fee covers the cost for line of credit fees and interest for borrowing the money from our bank. Any prepaid postage is due no more than 10 days from receipt of invoice.

Reminder: If you need an invoice from us in order to pay your estimated postage, **please let us know right away so that you can insure your postage is prepaid prior to your mail date.** The USPS will not take your mail without it. We recommend you estimate a little high. Any excess postage paid will be credited to your account.

Remit payments to:  
Attn: Accounting  
The Master's Touch, LLC  
1405 N Ash St  
Spokane, WA 99201

Let us know if you have any questions.  
Phone: 509-326-7475 or 1-800-301-1347  
email: [acct@themastertouch.com](mailto:acct@themastertouch.com)

Thank you,

ACCOUNTING DEPT.

Yes, please send me an invoice for estimated postage based on:

## Process and steps for Print and Mail process

All dates and times are approximate and represent best case scenarios.

We are quite willing and capable of adjusting to meet your specific needs. Just let us know.

### Step 1: Optional - but encouraged

60 - 95 days prior to your mail date

#### Address Validation:

As a favor to you, we offer to process your names and addresses through our address validation software and return to you those that need updating in your system. This is the CASS, AEC and NCOA process we describe in our accompanying documents. As soon as practical and within 60 - 95 days prior to your mailing, send to us via email or FTP the account numbers, names and addresses for all records that will mail. We will process through CASS and NCOA and return addresses that should be updated within one week. Those files are then removed from our server.

### Step 2: Mandatory (Only if you are a new customer or the existing files we have are changing)

At least 30 days - up to 6 months prior to your mail date

#### Test Data:

1. **Data Map** (*defining the data fields*)
2. **Form layout** (*mapping out data placement on the form*)
3. **Sample data file** (*last years data file or a preliminary file*)
4. **Example form with variable data populated.** (*previous completed form if available*)

#### How to provide data:

Provide to us via email or FTP a complete data file of what you currently have or of what you mailed last mailing so that we can set up your job to print correctly.

**Option #1:** Include a data definition file describing the name and length of each field. Also provide a data map showing where each field is to print on your form.

**Option #2:** Along with your data, send to us a PDF image of several statements that are included in your data so we can get an idea where each field is supposed to print. We strongly encourage you to still include a data definition file and layout map showing where each field is to print or we will have to do a lot of guessing.

Our IT department will use your test data to set up how your forms will print with the variable data. Initial proofing will be via PDF's. We ask that you give us the account #'s of all those that have special fields so we can insure all data is printing correctly and completely. Initial proofs will be returned to you within 2 weeks. Typically, there are adjustments that need to be made so it is not uncommon for the proofing process to take a total 3 weeks. After final approval, we will send hard copy proofs for testing OCR and/or barcode scanning, if appropriate.

### Step 3: Mandatory (Only if you are a new customer or the existing files we have are changing)

As much as 6 months prior to your mail date, but not less than 30 days prior.

#### Art Set-up:

Email to our art department/customer service a good high quality electronic file with your logo and/or any other art that you have. Also send a physical or scan sample of how you want your forms and envelopes set up for the parts that will be preprinted, i.e. all that prints in color and/ or is not included in the variable data. Within one week, PDF files will be returned to you for proofing these static printed items. Normally, we like to have you approve the preprinted art prior to having our I.T. Department begin to lay down the variable data so that any changes you make do not force programming changes. Once approved, we will need to have you sign the proof acknowledgments and tell us how many to print. It is critical that you provide us with a quantity that will slightly exceed the actual count we will need so that we are sure to have enough to complete your entire mailing.

### Step 4: Mandatory

2 weeks prior to your mail date (unless other timing is prior arranged)

#### Live Data:

Email or FTP your final production file to us. **Call or email us to insure we received it!** If we have received a sample file and have already set up your form, then you should receive **PDF proofs within approximately 48 - 72 hours**. Along with proofs we will tell you how many records we received and will ask you to verify that count. Once you approve these final PDF production proofs, we will need to send about 100 physical samples for you to test through any OCR or barcode scanning equipment in order to insure readability. Yes, even though we already tested, we have found times when a correction digit was calculated inaccurately or was missing and the scan was not readable. So this is an essential step we encourage you not to ignore. We will waive this test, but only on your written direction to do so and absolution of any responsibility on our part. Once we receive your final PDF approval or approval of physical samples, (whichever applies), print production will begin. **Normal processing time is 7 - 10 days after final proof approval.** Nevertheless, we always make every effort to complete as soon as possible. If an earlier date is needed please let us know and we will do all that we can do make that earlier date.

#### Optional:

*If you are signed up for our eNotice service, we can/will be setting that part up simultaneously with your test data and/or your live data. Proofing is also simultaneous.*

## CASS / NCOA / AEC

**CASS Certification** - This verification tool validates an address is recognized as a valid delivery address in the USPS postal directory of roughly 230,000,000 domestic U.S. addresses. TMT's CASS software will certify and correct every address that can be matched against this USPS directory. We add the zip+4 and all barcode information that will qualify each piece for automation postage. Those addresses that do not find a match in the directory fail to validate. They can still be mailed at full first class rates, but are much more likely to be returned as an "undeliverable as addressed" mail piece.

*Foreign Addresses - Any Non-U.S. address is a foreign address. Foreign addresses can NOT be CASS verified for postal discounts. They must be mailed at the full first class rate. Special services are available that can validate and correct Canadian addresses and a few other foreign countries. It is somewhat expensive but could be well worth the price. Let us know if you are interested.*

**LacsLink** is also part of the CASS system and is required in order to get postal discounts. Using LACSLink, the local addressing authorities are changing rural routes to physical addresses to permit the 911 emergency system to accurately dispatch emergency vehicles.

**NCOA (National Change of Address) verification** - When someone moves and fills out a change of address card, the USPS enters this into their "Forwarding" database. Any mail sent to the old address will automatically be forwarded to the new address for 12 months. For first class mail, any move between 12 and 18 months, the piece is returned to you with the new address noted. Unless you use a postal endorsement, like "address service requested" you, the sender, are NOT alerted that this person has moved. NCOA service compares your address list against this USPS move database. If NCOA finds a move within the last 48 months, the new "moved to" address is returned to you.

*USPS Move Update Requirement: In order to obtain postal discounts, all addresses in your mailing must be processed through a move update service within 95 days of your mail date. NCOA is the method that we use at The Master's Touch, LLC. Other options include Ancillary Services or ACS. If you have used any of these within the previous 95 days, you may not be required to process through NCOA.*

**AEC Service** - When an address cannot be CASS verified, you might consider AEC I and II. This service utilizes the knowledge of the carriers who actually deliver the mail since these same carriers often know what the actual address should be. The non-CASS verified addresses are sent to the carriers and those the carrier can correct are returned. Let us know if you are interested in this highly effective service.

## IMB Trace

IMB Trace is a relatively new service the USPS has begun to offer. This service provides the mailer with the ability to track each piece of mail in a bulk mailing from induction into the USPS to the carrier who delivers it at the mailbox. Utilizing the new Intelligent Mail Barcode (IMB) technology, your mail can be tracked via a mail piece identification number that can be included in the barcode. This mail piece ID is scanned by the USPS when it is first processed on their barcode scanning machines and scanned again as it is provided to the carrier who delivers the mail that same day. This can be done for every piece in your bulk mailing. This allows you to:

- Know what day and time your mail piece was first processed by the USPS.
- Know what date and time your mail piece was given to the carrier for final delivery.
- Download those dates and times for archival and future retrieval.

It should be noted that the USPS does not guarantee 100% address tracking, since a few areas do not yet have the IMB barcode scanning technology deployed yet. Typically 95%+ of your mail will be scanned and recorded. The investment required for this service depends on quantity, but typically runs \$50.00 minimum or \$5.00 per thousand statements.



Reset Form

Print Form

Customer Name: Yamhill County OR Tax Collector Name of this mailing? 2015 Tax Statements  
 Expected quantity: 43000 When can we expect your final production file? Oct 8, 2015 Target Mail Dates? Range of dates you want to mail Oct 19, 20 To: Oct 23, 20

**Promise mail date to be based on prior agreement or 7-10 workdays after final proof approval. Target mail date and promise date are not necessarily the same.**

\*\*\*\*\*  
**Samples of Pre-printed Items needed (via mail or PDF): Please Note Blue Fields are REQUIRED to start processing your job and to SUBMIT form.**

1. Statement - what size will you use? Letter 1a. Statement - If other, list dimensions: none  
 2. Outside envelope - will this be a #10 window? Yes 2a. Outside envelope - if other, list dimensions: none  
 3. Reply envelope - one, two, or none? One 4. NCOA: Yes - NCOA 48 months at \$5.00/M records  
 5. Would you like to use IMB Trace at \$5/M records? No \* See page 4 for more information on NCOA  
 \* See page 2 for more information on IMB Tracking If already in compliance, what move-update service did you use and was that completed within the last 95 days on your entire mail list? Please beware, the USPS may penalize at 8 cents per mail piece for non-compliance.  
 6. Do you want PDFs of every statement we print? One Large File (2¢ per record) 7. Do you use OCR scanners to process your statement stubs? Yes  
 8. Extra Statement Stock: Store 9. Extra non-permit envelope Stock: Envelopes utilizing a permit are not able to be returned to you. Inventory for next year

Inserts-will you have any? One Insert #1-Size 8.5x11 Insert #2-Size eNotices insert? No Extra Insert Stock: Recycle  
 #1 Description Black & White on White - Double sided - tri-fold #2 Description

If over 2 inserts, use special handling box. We will store for future mailings if the quantity is at least one full carton. Otherwise, please indicate above if you would like us to recycle or return to you.

Any Special Handling - (multiple files, statements that don't mail, mortgage codes, etc.)? Describe: NCOA & PDF included in contract at no additional cost.

**DATA Type and Information: Described below is what we need to begin set-up of variable data:**

- Sample data** - at least 1,000 records is preferred, with longest and shortest fields, maximum fields, and any other non-standard record type that we can be sure to account for in set-up. Feel free to send us your entire production file from last year's mailing to [pm@themastertouch.com](mailto:pm@themastertouch.com).
- Data Layout** - This identifies the data, what field is first, second, third, etc. so we know what the data is that we are working with.
- Data Map** - A sample statement identifying where each data field should print. OR, if you can provide a sample statement with all the data filled in, that is ALSO provided in the sample data set. In order to insure that we place your data in the proper places on your form, we need a data map telling us where each field in your data will print. You can accomplish this by:
  - Writing the field number on the form where each field should appear and/or
  - Providing a printed sample(s) with all the data filled in and insure that this statement is included in the sample data file you send to us. That way we can look at the data and see where you printed it.

What Software are you using now? Create!Form by Bottomline Technology to create PDF's

What date can we expect to receive sample data, data layout and data map? Date Sep 11, 2015

Contact Name for whom to discuss data issues with (Typically I.T. Department)?

Name: Jill Olson Email: olsonj@co.yamhill.or.us Phone: (503) 434-7505 x 3231

**Who should receive proofs of variable data forms?**

1. Jill Olson Email: olsonj@co.yamhill.or.us  
 2. Eileen Slater 3. Jeff Ivie Email: slatere@co.yamhill.or.us 3. iviej@co.yamhill.or.us

**Suggested Timelines in order to guarantee timely mailing:**

- Sample data - 60 days prior to requested mail date.
- Sample envelopes and statements - 60 days prior to mail date.
- NCOA file - if you wish for us to provide this service we need delimited text file with Account#, first name, last name, address1, address2, city, state, zip (all in separate fields) 30 - 60 days prior to mail date. NCOA can take as long as one week for us to get results back to you.
- Final proof approval and finalized quantities on all preprinted forms, envelopes and inserts - At LEAST 30 days prior to mail date.
- Final production file - 14 WORKING DAYS prior to requested mail date.
- Final proof approvals on production file proofs - 10 workdays prior to mail date.

**Proof Carefully: We are happy to Re-process and Re-proof as many files as necessary, but only 3 art proofs and 3 variable data proofs have been figured into our costs. Beyond 3, we may need to charge an added fee. If we need to Re-process and proof due to an error on our part, there is never an added charge.**

Can you meet these recommended timelines? Yes Please explain:

Note: These are suggested timelines. More time is even better. Less time can still be accommodated, but we would request you inform us if there will be any delays so we can properly schedule and apprise you of our ability to meet your special request.

STANDARD TERMS AND CONDITIONS

These Standard Terms and Conditions ("Terms") are attached to and made a part of the service contract (the "Contract") between The Master's Touch, LLC ("TMT") and ("Customer"). The Terms and the Contract are collectively referred to as the "Agreement." TMT and Customer are collectively referred to as the "Parties" and each individually as a "Party."

1. **Terms Control.** In the event of a conflict between the Contract and the Terms, the Terms shall control. 2. **Payments and Late Fees.** TMT, at its option, may impose a late charge of 1.5% per month on all amounts that remain unpaid more than 10 days following the payment due date. 3. **Warranties and Limitations.** 3.1. Customer warrants to TMT on a continuing basis throughout the term of the Agreement that (a) the data it provides to TMT are materially accurate and in conformity with all of the Agreement's requirements; (b) Customer will diligently review all proofs provided by TMT to Customer and immediately notify TMT of any errors or necessary revisions; and (c) Customer and its representatives are duly authorized to transmit the data provided under the Agreement to TMT and that TMT is duly authorized to receive, use, and disclose data as set forth in the Agreement. 3.2. EXCEPT AS PROVIDED HEREIN, TMT DISCLAIMS ALL REPRESENTATIONS AND WARRANTIES OF ANY KIND OR NATURE, EXPRESS OR IMPLIED (EITHER IN FACT OR BY OPERATION OF LAW) WITH RESPECT TO ANY SERVICE OR ITEM PROVIDED HEREUNDER, INCLUDING BUT NOT LIMITED TO ANY WARRANTY OF MERCHANTABILITY, TITLE, DESIGN, NON-INFRINGEMENT, OPERATION OR FITNESS FOR ANY PARTICULAR PURPOSE AND ANY WARRANTY ARISING FROM CONDUCT, COURSE OF DEALING, CUSTOM OR USAGE IN TRADE. 3.3. In no event will TMT have any liability for damages that arise out of or that could have been prevented by Customer's diligent review of proofs provided by TMT to Customer or that are related in any way to Customer's provision to TMT of inaccurate data. If reprinting and mailing is requested due to such an error, Customer shall pay all costs associated therewith, including postage. 3.4. No claim against TMT of any kind under any circumstances will be made more than 90 days after Customer knows, or in the exercise of reasonable care could know of

such claim, an act or omission of TMT that would give rise to such claim, or any material damage caused by or likely to be caused by such act or omission or to be part of such claim. 3.5. In the event of any defect in the products or services provided under the Agreement arising solely from TMT's acts or omissions, Customer's sole and exclusive remedy is that TMT will re-run that portion of the printing and mailing determined to be defective at its expense, but TMT will not be required to pay the cost of postage for the replacement mailings. TMT will not be liable for and will not incur any credit or remedy against it for failure to provide services or functionality with respect to any data that it believes in good faith contains errors, inaccuracies, corrupt, or misleading information. NOTWITHSTANDING ANYTHING TO THE CONTRARY, TMT WILL NOT BE LIABLE FOR INDIRECT, EXEMPLARY, PUNITIVE, SPECIAL, INCIDENTAL OR CONSEQUENTIAL DAMAGES OR LOSSES, OR FOR LOST PROFITS OR BUSINESS OPPORTUNITIES OR THE COST OF PROCUREMENT OF SUBSTITUTE ITEMS OR SERVICES, UNDER ANY LEGAL THEORY. 4. **Remedies Reasonable.** Customer hereby acknowledges on a continuing basis that any exclusive and/or limited remedies available in this Agreement are reasonable and sufficient and that they will not fail of their essential purpose even if Customer may not take advantage of them in some circumstances by their terms. 5. **Forum; Choice of Law.** The Parties acknowledge that TMT is headquartered in Spokane, Washington. Accordingly this Agreement and all amendments to it will be governed by the laws of the State of Washington applicable to agreements made and to be performed wholly within Washington, without regard to conflicts of laws. The Federal District Court for the Eastern District of Washington and the state courts of Spokane County, Washington will be the exclusive venue for any court proceeding between the Parties arising out of, or in connection with, this Agreement. The Parties hereby submit to and consent exclusively and irrevocably to the jurisdiction of such courts for these purposes.

Accepted and Agreed:

TMT  
Master's Touch, LLC  
By: Jim Coté  
Title: President

Accepted and Agreed:

CUSTOMER

Print Name: Eileen Slater  
Title Deputy Tax Collector  
Date 09/09/2015

I agree to these terms.

Signature Eileen Slater

By typing my name above I signify that I am digitally signing this form.

Accepted by Yamhill County  
Board of Commissioners on  
1-21-16 by Board Order  
# 16-21