

SWC# 314 Mail & National Change of Address (NCOA) Services Contract Information and Usage Instructions

Contract Period: This is a five year contract term running from March 1, 2016 to February 28, 2021. The contract was procured through an ITB as Edison Event #32110-9074-9259.

Summary/Background Information: This contract includes mail services and national change of address (NCOA) services. Mail services include preparing and processing standard mail and bulk mail with labeling, inserting, folding, sorting, addressing, and metering mailings. NCOA services include revisions and updates to mailing lists with move updates and identification of incorrect or missing address information. The contract is open to local governmental units, members of the University of Tennessee or Tennessee Board of Regents systems, and nonprofit entities identified in Tenn. Code Ann. § 33-2-1001.

State Contract Administrator:

Laitin Beecham
Category Specialist
Central Procurement Office
(615) 291- 5794
Laitin.Beecham@tn.gov

Vendor Contact Information:

Southern Post Inc. (Mail Services)
Edison Contract #48968
Vendor #107764
Crystal Hart
(615) 360-9310
Crystal@southernpost.com
2111 Utopia Avenue
Nashville, TN 37211

Peachtree Data Inc. (NCOA Services)
Edison Contract #48948
Vendor #140582
Derek Frachiseur
(678) 987-4680
dfrachiseur@peachtreedata.com
2905 Premiere Pkwy, Suite 200
Duluth, GA 30097

Emergency Call Procedures: N/A

Usage Instructions:

1. Contact DGS Postal:

For Mail Services:

- DGS Postal Services division provides centralized mail services to all State departments, commissions, and agencies within Davidson County. All mail service requests should first go to DGS Postal Services. If DGS Postal Services cannot provide the service (due to a specialized need or a high volume of requests), then you may request service through Southern Post.
- Please contact DGS Postal Services at 615-741-8358 or Phillip.O.Page@tn.gov.

2. Contact Contractor to Request Service:

- Please contact the contractors as listed above under "Vendor Contact Information" to request service. Southern Post provides mail services. Peachtree Data provides national change of address (NCOA) services.

3. Provide Data/Materials to Contractor & Service Delivery:

For Mail Services:

- Provide information and/or materials needed for mail preparation/processing (i.e. addresses for labels, pages to be folded and inserted).
- Delivery/pick-up of materials should be agreed on between the End User and Southern Post. The standard is for End Users to deliver the materials to Southern Post; however, if arrangements are made for Southern Post to pick-up materials it will be no additional cost.

For NCOA Services:

- Provide data file of mailing lists to be checked for move updates and incorrect or missing address information. Coordinate format and transfer of data between the End User and Peachtree Data. Contractor will provide NCOA Process Acknowledgement Forms (PAF) to the End User to be completed and returned with each order.
- If material is mailed, the shipper pays for the shipping cost (i.e. End User to pay for shipping costs when shipped to the Contractor and Contractor to pay for shipping costs when shipped to the End User).
- Peachtree Data will return the updated mailing lists to the End User. Format and transfer method of data to be coordinated between the End User and Contractor.

4. Summary of Services:

Mail Services:

- Inkjet and pressure sensitive labelling
- Affixing cheshire and pressure sensitive labels
- Machine and manual folding
- Machine and manual envelop inserting

- Printing 8.5"x11" black and white for mailings
- Performing coding accuracy (CASS), removing duplicates, and performing zone counts on mailing lists
- Meter imprinting
- Sealing
- Sorting mail
- Tabbing
- Letter personalization (laser)
- Mailing materials, delivery to USPS

NCOA Services:

- NCOA Link – checks mailing lists for move updates, provides the new address if a move match is made, and returns footnotes indicating why a move match could not be made
- Delivery Point Validation (DPV) – indicates if an address is complete and correct (beyond the CASS zip+4 system) and flags commercial mail receiving agencies
 - Individual Matching Logic (IML) – option specifying individual moves using all name components (ideal for financial statements, tax information, and voter registration lists when only an individual in a household has moved)
- Locatable Address Correction Service (LACS) – provides new addresses when a 911 emergency system has been implemented (i.e. converts rural-style address to city-style address)

Requisition and Purchase Order Generation:

Requisitions and Purchase Orders should be generated using each Agency's specific processes and guidelines. For information on how to create a requisition and/or purchase order please use the "Guide to Agency Purchasing" document in Edison under the Procurement Tab, Procurement Information box. All charges should be assigned to an individual contract line item.

Billing and Payment Instructions:

Methods of Payment: Contractors accept check and ACH deposit; Southern Post also accepts p-card payments.

The Contractor shall submit an itemized invoice to the state agency billing address provided in the PO. The invoice may include only charges for services described in the PO.

Asset and Inventory Management: N/A