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| **BUREAU OF FISCAL SERVICES** **Procurement Unit** |  |  |

**Request for Information (RFI) 19-603**

**Print Shop Workflow Solution Software and Professional Services**

The New York State Department of Taxation and Finance (the “Department” or “DTF”) is requesting qualified vendors to supply information which may be used when considering a program or solution that can provide a workflow solution that will allow work to be tracked from the print request to the job completion.

This is a request for information only. This RFI is issued solely for information and planning purposes – it does not constitute a Competitive Bid or a promise to issue a Competitive Bid in the future. Responders are advised that the Department will not pay for any information or administrative costs incurred in response to this RFI. All costs associated with responding to this RFI will be solely at the responders’ expense. Not responding to this RFI does not preclude participation in any future Competitive Bid, if issued.

**I. Timeline**

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| **Event** | **Date** |
| Issuance of RFI | March 30, 2020 |
| Deadline for Submission of Vendor Questions | April 6, 2020 |
| Department’s Response to Vendor Questions | April 9, 2020 |
| Vendor Response Due | April 15, 2020 |

**II. RFI Questions and Responses**

The vendor community will have one opportunity to submit written questions regarding this RFI. All questions regarding this RFI should be submitted via email (preferred), fax or mail and should be received by the date specified in the timeline. Questions received after this date may not be responded to.

The Department will provide a written response to all questions received by the date specified in the timeline. Responses to vendor questions will be posted on the Department’s procurement website at: <http://www.tax.ny.gov/about/procure/>.

**III. Overview**

The New York State Department of Taxation and Finance collects tax revenue and provides associated services in support of New York State government operations. The print shop located at the Department’s Green Island facility is the largest and most cost-efficient government print shop in New York State for forms production. Averaging an output of almost 90 million images each year, the print shop includes:

* a state-of-the-art digital computerized pre-press unit,
* offset and digital print shops, and
* a full finishing and bindery unit.

These operations produce 100% of the Department’s printing needs, including regular, adjusted, current, previous, and prior year refund checks, as well as special project checks such as STAR and Real Property refunds.

**A. Offset Print Shop**

The offset print shop offers commercial-quality printing with a wide array of production choices. Approximately half of the 90 million images printed in the operation are produced in the Department’s offset print shop. This includes the use of the following types of presses:

* Color King Press - produces high volumes of booklets allowing DTF to complete the print-to-mail function under one roof and maintain quality control and scheduling deadlines. This press produces 20,000 booklets of 8 to 32-page signatures/layouts per hour. This press produced approximately 150,000 booklets consisting of two 32-page signatures/layouts each, totaling over 10.8 million pages.
* Didde Web-to-Sheet Presses - produces quality 2-color, 2-sided output with inline finishing. DTF currently utilizes three of these presses.
* Omni Sheet-Fed Press - produces larger size documents; 2-color, 2-sided output used for specialty printing including posters, booklet covers, envelopes, carbonless sets, etc. DTF currently utilizes one of these presses.
* Smaller sheet-fed offset presses - produces 1-color jobs printed on various stocks. DTF currently utilized several of these presses.

The Department’s print shop also produces print work for other state agencies such as OTDA, GOER, Civil Service, CSEA Partnership, Division of Budget, Department of Motor Vehicles, Department of Labor, Department of Law, Department of State and the Governor’s Office, as scheduling permits. These print works are fed into a workflow solution to be tracked through the entire process for the Department’s customers.

**B. Digital Pressroom**

The Department’s digital pressroom is a fast-growing operation and produces approximately 54 million images annually. The digital printing center offers quality, full color output ranging from basic flyers to overhead transparencies. Reproductions, tabs, reports and transparencies are produced quickly and efficiently.

**C. Finishing Operation**

The finishing operation includes binding, trimming, drilling, collating, and folding activities conducted after printing. The bindery houses a Mueller-Martini speed binder which can rapidly saddle stitch up to 132-page booklets plus a cover. DTF also uses heat-sealed and spiral binding machines to allow various binding options when constructing booklets.

**IV. Objective**

The Department’s print shop is in need for a workflow solution that will allow work to be tracked from the initial request to job completion. The current workflow solution is no longer supported and is past end of life. DTF is seeking an out-of-the-box software/suite specialized for the printing industry which will provide workflow which should include, but not be limited to, marketing automation, eCommerce, Web-to-print, planning, imposition, scheduling, shop floor data collection, fulfillment, warehousing, shipping, and direct integration to JDF-enabled EFI Fiery © digital front ends.

It is the objective of this solicitation to obtain additional information concerning solutions which could be used for this workflow. Responses may be used to assist the Department in a development of any future bid document.

**V. RFI Response**

Please respond to this RFI by April 15, 2020. Be sure to provide the name, address, contact person, phone number and email address for your company. Your response to this RFI should be submitted via email (preferred), fax or mail:

Email: bfs.contracts@tax.ny.gov

Fax: (518) 435-8413

Written Correspondence:

New York State Department of Taxation and Finance

Attn: Amber Alexander / RFI 19-603

Procurement Services Unit

WA Harriman State Campus

Albany, NY 12227

A response does not bind or obligate the responder or the Department to any agreement of provision or procurement of any products referenced.

The Department may seek additional information or clarification during its review of RFI responses. This may be done through email, phone discussions, meetings, demonstrations, and/or correspondence, and may be with an individual respondent or a group of respondents.

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| **Section I. System Requirements****Describe how your product, capacity, and process can meet the DTF requirements. Make comments and attach additional information as needed.** |

| **Requirements** | **Solution meets this requirement in its existing form?****(Yes/No)** | **Solution requires modification to meet this requirement?** **(Yes/No)** | **Estimated timeframe for modification**  | **Estimated cost for modification**  |
| --- | --- | --- | --- | --- |
| 1. The solution must identify, confirm and document business objectives and agreed upon key performance indicators (“KPI”) to meet the business needs.
 | [ ] Yes [ ]  No | [ ] Yes [ ]  No |  |  |
| **Describe, comment, attach additional information as needed:** |
| 1. The solution must identify and document current state workflow and baseline time and cost.
 | [ ] Yes [ ]  No | [ ] Yes [ ]  No |  |  |
| **Describe, comment, attach additional information as needed:** |
| 1. The solution must identify and document future state workflows that will support the business objectives and meet the KPIs with the agreed upon use cases and scenarios.
 | [ ] Yes [ ]  No | [ ] Yes [ ]  No |  |  |
| **Describe, comment, attach additional information as needed:** |

**Section II. Vendor Requirements**

**Please respond to the following questions in relation to the solution.**

| **Questions** | **Answers** |
| --- | --- |
| 1. Can you create and deliver a configured system that meets the agreed upon future state workflow and use cases?
 | Answer: |
| 1. Can you train a core team to perform regular maintenance activities, such as: add\update\deactivate users, inventory, inks, shipping methods, packaging, and payment?
 | Answer: |
| 1. Can you create standard operating procedure(s) (“SOP”)?
 | Answer: |
| 1. Can you conduct end user usage training?
 | Answer: |
| 1. Can you structure and conduct solution validation pilot sessions for product configuration and end user readiness?
 | Answer: |
| 1. Do you provide support for your solution and any additional products needed to use your solution? If so, what level of support do you provide?
 | Answer: |
| 1. How are upgrades of the software managed and supported?
 | Answer: |
| 1. What are the required user skillsets in order to use your solution?
 | Answer: |

**Section III. Cost**

**Please provide information in relation to the costs of the solution.**

| **Cost Items/Questions** | **Cost Amounts/Answers/Comments** |
| --- | --- |
| 1. What is the cost to purchase a perpetual license for the proposed Software / Solution?
 | Answer: |
| 1. What would be the cost of any Professional Services required to configure the out-of-the-box solution to meet the needs of the Department?
 | Answer: |
| 1. What, if any, would be the cost to train DTF employees on the new solution?
 | Answer: |
| 1. What is the cost of maintenance and support? What fees, if any, are associated with upgrades of the software? Are these covered under a general maintenance plan?
 | Maintenance and support $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Software upgrades $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Comments: |
| 1. Are there any other costs? If so, please provide.
 | List other costs:Comments: |

**Section IV. Experience and References**

| **Experience** | **Response** |
| --- | --- |
| 1. Please describe your firm and your experience in relation to the solution. Please attach additional information if needed.
 | Describe: |
| 1. Please provide your firm’s contact information for DTF to discuss the solution.
 | Contact name: Phone:Title: Email: |
| 1. Does the solution have a proven track record (i.e., multiple year contracts for existing clients)? If so, please provide client name, contract term, client contact information, and a description of the project scope.
 | Information of contract(s):Client contact(s): |
| 1. Has your solution been proven to be substantially compliant with the provisions of the New York State Tax Law? If so, where is it currently employed? Please provide client contact information.
 | Answer: |
| 1. Has your solution been proven to be substantially compliant with the secrecy and confidentiality requirements of the New York State Department of Taxation and Finance, New York State Law, and the IRS? If so, where is it currently employed? Please provide client contact information.
 | Answer: |