

SECTION D – SCOPE OF SERVICES1. BACKGROUND

The Board of Elections for Montgomery County, Maryland (hereinafter "The Board") satisfies various legal requirements related to public notice and return mail list maintenance by mailing an individually- addressed, non-forwardable Specimen Ballot Booklet with an extremely tight production schedule to all registered voters prior to each election. Elections occur in a four-year cycle; on the first Tuesday after the first Monday of November in each leap year, a general election is held in which the highest office on the ballot is the President of the United States (hereinafter "Presidential General Election"). In non-leap even years, the highest office on the ballot is that of Governor of the State of Maryland (hereinafter "Gubernatorial General Election"). In the spring or summer of each even year, the Republican, Democratic, and any other qualifying political party may also hold a primary election in which candidates of that party are nominated to appear on the ballot in November (hereinafter "Presidential/Gubernatorial Primary Election"). There may also from time to time be single district or countywide special elections declared to fill a vacancy in an office (hereinafter "Special Election").

2. CONTRACTOR RESPONSIBILITY

- A. The Contractor is responsible for furnishing all paper, production materials and services from receipt of the artwork for each ballot style and addressee data through preparation, printing, addressing and delivery to the U.S. Postal Service for mailing in accordance with the Scope of Services and the Anticipated Production Schedule detailed in this document and at the lowest possible cost for optimum efficiency of bulk mail delivery and in compliance with all printing and production requirements set forth in this solicitation.
- B. The Board of Elections may request, at its discretion, from the Contractor to furnish timely a paper proof copy or an electronic proof of all ballot styles and obtain authorization to print prior to production. Specimen Ballot Booklets will be mailed by the Contractor, at either the bulk rate under Montgomery County's U.S. Postal Service permit, or the Contractor will pay postage to mail. The means by which Specimen Ballot Booklets are mailed will be directed by the County. The timeliness of delivery to registered voters is critically important. Prior to delivery, the Contractor must provide the Board of Elections with the opportunity to review and sign off on the printing and delivery schedule for each Ballot Style.

3. COUNTY RESPONSIBILITY

The Board of Elections will provide to the Contractor specific production schedules and anticipated volumes for each Ballot Style for each election; camera-ready copy or electronic copies of all pages for all Ballot Styles for use in preparing the necessary proofs and final copy; all data required for addressing and printing including, for each registered voter, the correct Ballot Style number; polling place name and address; party affiliation (for a primary election); district and precinct number; first, middle and last name of voter; voter identification number; and mailing address of voter on the Contractor's available secure SFTP site or other high quality, secure method for data transfer approved by Montgomery County.

4. PRINTING

- A. Sample Ballot Booklets must be uniform in flat size, printed on two sides in four color ink on **paper that meets or exceeds 40# 80 bright**. The **paper must have a basis weight (lb./3300 ft²) of 30.4 to 45 ± 1.0%, Brightness ISO of 80.0 ± 2.0, and opacity (TAPPI) (%) of 85 to 90.5**. The County reserves the right to request a sample of the paper(s) bid, including a specification sheet.
- B. Specimen Ballot Booklets, including special elections Sample Ballot Booklets, are voter information booklets. They must be suitable for mailing with approximate dimensions of 8 1/2" x 11" with a self-cover, containing approximately 20 to 36 pages of information.

- C. The cover is imprinted with correct, specific mailing information which includes the ballot style number, polling place name and address, district and precinct number and voter identification number, party affiliation (primary election only), name and address of the voter, and a bar code reflecting the addressee's voter registration number.
- D. For a countywide election, the approximate total volume of Specimen Ballot Booklets is 680,000-800,000. The total volume is divided into up to 100 lots of varying size (hereinafter "Ballot Style Groups"), each with internal pages containing a specimen ballot and other information specific to the contests appearing on the ballot for the residential address and party affiliation of the voter. Generally, the core of the booklets will be the same for each ballot style. What will change from one ballot style to another is the actual ballot with all the contests listed (both English and Spanish versions) – for example, please see pages 10 through 14 and pages 26 through 30 of the Official Sample Ballot and Voting Information 2020 Presidential General Election booklet (APPENDIX A) or pages 13 through 14 of the Official Sample Ballot and Voting Information 2024 Presidential Primary Election booklet (APPENDIX C). The color of the front cover will change in the Primary Elections depending on the party affiliation of the voter while the back cover will change in any election to the extent that the voter's information is ink-sprayed.
- E. The number of pages and the number of Ballot Styles will vary for each election and will depend on factors outside of the County's control including the number of parties conducting a primary election; the number of contests on the ballot; the number of overlapping districts requiring unique combinations of contests to appear on the ballot; the number of candidates qualifying for the ballot for each contest; the number of questions certified for the ballot by the Maryland State Board of Elections; and any legal proceedings regarding the certification of ballots or public notices required to appear in the Specimen Ballot Booklet.
- F. The Contractor must use due care when addressing the Specimen Ballot Booklets to ensure that the proper ballot style number, shown on the face of the Specimen Ballot artwork for that ballot style, corresponds exactly to the party and ballot style provided to the Contractor. The booklets must be able to meet U.S. Postal Service thickness, deflection verification and other standards.
- G. At the discretion of the Board, permission may be granted for the Contractor to print and mail consolidated lots (hereinafter "Ballot Style Groups"), inclusive of multiple ballot styles that are associated with different precincts but that have identical contests and candidates appearing on the ballot. This may reduce the number of separate lots required to be printed.
- H. For information purposes:
 - 1) A sample of an actual Specimen Ballot Booklet with inkjet printing containing the individualized address and voter information is available for viewing upon request at the Board of Elections, 18753 N. Frederick Avenue, Suite 210 in Gaithersburg, Maryland.
 - 2) The Official Sample Ballot and Voting Information 2020 Presidential General Election booklet is attached as APPENDIX A.
 - 3) The Official Sample Ballot and Voting Information 2022 Gubernatorial General Election booklet is attached as APPENDIX B.
 - 4) The Official Sample Ballot and Voting Information 2024 Presidential Primary Election booklet is attached as APPENDIX C.

5. ADDRESSING

- A. Contractor must address the Specimen Ballot Booklets in compliance with all USPS Election Mail and Coding Accuracy Support System (CASS) requirements to achieve the lowest possible Enhanced Carrier Route Walk Saturation Sequence (ECRWSS) postage rate available.
- B. Contractor must print the voter's address provided by the Board of Elections on the non-forwardable Specimen Ballot Booklets as required by the National Voter Registration Act. Notwithstanding otherwise applicable postal regulations, Contractor may not substitute any forwarding address received from the U.S. Postal Service or any other means for the address provided by the Board of Elections.
- C. Contractor must perform a National Change of Address match on each voter data file provided by the County for addressing Specimen Ballot Booklets and return to the County a text file and summary data for identified address changes to the Board of Elections for list maintenance purposes.

6. PREPARATION FOR MAILING

Specimen Ballot Booklets must be collated, glued or stapled, folded as necessary, and inkjet sprayed with voter's name, address provided by the Board of Elections, and polling place information. In addition to the recipient's name, delivery address and Intelligent Mail Bar Code, Specimen Ballot Booklets must be sprayed outside the optical character read area used by Postal Service processing equipment with at least two lines of text containing specified voter information such as polling place name and address, ballot style, party affiliation (for the Primary elections), voter registration number and a bar code reflecting the addressee's voter registration number.

7. DELIVERY

- A. For each election, unless otherwise specified by the County, there are two deliveries for mailing to the U.S. Postal Service Shady Grove Bulk Mail Unit located at 16501 Shady Grove Road, Derwood, Maryland.
- B. Specimen Ballot Booklets must be tagged with appropriate visibility labeling as specified in current USPS guidelines for election mail, and mailed in accordance with legal requirements and deadlines to eligible voters in Montgomery County.
- C. Contractor must quote four separate options on the Quotation Sheet as follows:
 - 1) Postage paid directly by the County to the USPS through the County's preprinted U.S. Postal permit ONLY to in-County addresses; and
 - 2) Postage paid directly by the County to the USPS through the County's preprinted U.S. Postal permit for ALL mailing addresses, including out-of-state and overseas addresses; and
 - 3) Postage paid by the Contractor to the USPS within the scope of contracted services for ONLY in-County addresses; and
 - 4) Postage paid by the Contractor to the USPS within the scope of contracted services for ALL mailing addresses, including out-of-state and overseas addresses.
- D. Approximately 90% of the total addressed volume must be delivered in the first delivery and approximately 10% in the second delivery. A single file set of unaddressed booklets must be delivered to the administrative offices of the Montgomery County Board of Elections, located at 18753 N. Frederick Avenue, Suite 210 in Gaithersburg, Maryland.

8. PRODUCTION SCHEDULE

- A. The County requires that the vendor be ready to start the presses within one week of the date specified by Election Law § 9-207(e) for the printing of ballots to begin, or 60 days prior to an election, and be prepared for a rapid turnaround in personalization and sorting of the sample ballots in carrier walk route order for

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immediate delivery to every registered voter in the County. This is not a merely desirable service but a legally mandated public notice. (This date is subject to change in future contract terms by written Amendment, if approved by the Director, Office of Procurement.)

- B. To meet various public notice requirements in state laws and regulations, the Specimen Ballot Booklet must be mailed on or before specific dates with an extremely tight production schedule. The Contractor acknowledges that the schedule is compact and must be met and will require operations on nights and weekends in order to meet the delivery schedule.
- C. Contractor and the Board of Elections agree to make every reasonable effort to adhere to the overall timeline below. Prior to delivery, the Contractor must provide the Board of Elections with the opportunity to review and sign off on any amendments to the County-provided printing and delivery schedule for each Ballot Style.
- D. Because of the nature of the work and the laws and regulations governing the work, the Contractor may be required to deliver goods/services in a shorter time frame as determined necessary by the Board of Elections in order to have the Specimen Ballot Booklets distributed accurately and within the time frame set by the State of Maryland and State Board of Elections. Below is a representative schedule that is subject to change for each election.

Event	Performed By	Days Before Election Day
Sample Mail Data File, Preliminary Artwork, and Preliminary Volume and Page Count Provided to Contractor	County	90
Deadline for State to Certify Content and Arrangement of Ballot	External	64
Deadline for Candidate to Seek Judicial Review	External	62
First Data File Provided to Contractor	County	60
Final Artwork Provided	County	60
Proof Delivered	Contractor	58
Proof Approval	County	56
Delivery of Proof with Inkjet Address Data	Contractor	54
Approval of Proof with Inkjet Address Data	County	52
Begin Printing	Contractor	51
First Mail Delivery Date	Contractor	46
Initial Lot of Unaddressed Copies Delivered to Board of Elections	Contractor	36
Voter Registration Deadline	External	21
Final Data Entry Complete; Second Data File Provided to Contractor	County	17
Mail Delivery Date for Second Data File	Contractor	11
Election Day	External	0

9. CONFIDENTIALITY OF DATA

The Contractor must keep confidential all documents, materials, and data prepared or developed by the Contractor or supplied by the County. The County retains ownership of all such documents, materials and data. Voter data provided to the Contractor for use in preparing proofs and formal copy such as, but not limited to, the correct Ballot Style number; polling place name and address; party affiliation (for a primary election); district and precinct number; first, middle and last name of voter; voter identification number; and mailing address of voter is the property of Montgomery County and must not be shared and must not be used by or for any other commercial or non-profit organization.

10. PRICES

- A. Bidder must provide prices on the Quotation Sheet that are net, inclusive of all charges for transportation; FOB destination; inside delivery; preparation of proofs; preparation and delivery of plates

and proofs; delivery and pick up of proofs; press setups for multiple ballot styles; printing, addressing, tagging of containers and mailing services; and ALL other charges necessary for performance of work as outlined in the specifications and scope of services.

- B. Prices are firm for the initial one-year term of the contract, except for changes in postal rates for which price adjustments may be requested whenever they occur, upon approval by the Director, Office of Procurement. A request for a non-postage price adjustment after this one-year period, is subject to Section C. 46 ANNUAL PRICE ADJUSTMENT. Prices are less Federal, State, and Local taxes. Pricing must be supplied as cents per voter.
- C. The estimated value of a Contract for an initial one-year term plus two one-year renewals is \$595,500.00. This is calculated for estimated costs for a 2024 Presidential General Election, 2026 Gubernatorial Primary, and 2026 Gubernatorial General Election. This does not include Special Elections. All ordering is dependent on funding by the County Council. The estimated Contract value is not guaranteed, and good performance does not guarantee renewal of a term.

11. GRAPHIC DESIGN SERVICES

Bidder must quote a price for graphic design services at a fixed rate stated in dollars per hour on the Quotation Sheet.

12. NATIONAL CHANGE OF ADDRESS (NCOA) SERVICE

Separate and apart from NCOA address matching required under this Contract for the mailing of Specimen Ballot Booklets, the Contractor must provide additional USPS National Change of Address service, inclusive of all setup and data processing charges, to return a summary report and text files containing USPS NCOA data for all residential and/or mailing address matches for the previous 12 months for the complete Montgomery County voter file. The price must be stated on the Quotation Sheet at a fixed rate of dollars per thousand voters.

13. POSTCARD PRINTING, ADDRESSING, AND MAILING

- A. The Bidder must provide pricing for printing, addressing and preparation for mailing of machinable postcards on 110# white index stock, black ink only, one version only, minimum dimensions 3.5" x 4.25" and maximum dimensions 5" x 6", in addition to Specimen Ballot Booklets in the same tight timeframe and in compliance with all USPS Election Mail and Coding Accuracy Support System (CASS) requirements to achieve the lowest possible Enhanced Carrier Route Walk Saturation Sequence (ECRWSS) postage rate available at the fixed rates given.
- B. Fixed rates must be provided in cents per voter according to the quantity breakpoints detailed on LINE 4 of the Quotation Sheet.

14. SINGLE BALLOT STYLE SPECIMEN BALLOT BOOKLET

- A. The Bidder must provide pricing for Specimen Ballot Booklets for a countywide or district special election. Prices are net, inclusive of all charges for transportation; FOB destination; inside delivery; preparation of proofs; delivery and pick up of proofs; printing, addressing, tagging of containers of Sample Ballots and mailing services and ALL other charges necessary for performance of work as outlined in the specifications and scope of services.
- B. Prices are less Federal, State, and Local taxes. Prices must be stated on the Quotation Sheet as cents per voter for:
 - 1) Single Ballot Style Special Election Specimen Ballot Booklet for more than 500,000 voters, 20 pages.
 - 2) Single Ballot Style Special Election Specimen Ballot Booklet for 100,000 to 500,000 voters, 20 pages.
 - 3) Single Ballot Style Special Election Specimen Ballot Booklet for 10,000 to 99,999 voters, 20 pages.

- 4) Single Ballot Style Special Election Specimen Ballot Booklet for less than 10,000 voters, 20 pages.
- 5) Single Ballot Style Special Election Specimen Ballot Booklet for more than 500,000 voters, 24 pages.
- 6) Single Ballot Style Special Election Specimen Ballot Booklet for 100,000 to 500,000 voters, 24 pages.
- 7) Single Ballot Style Special Election Specimen Ballot Booklet for 10,000 to 99,999 voters, 24 pages.
- 8) Single Ballot Style Special Election Specimen Ballot Booklet for less than 10,000 voters, 24 pages.
- 9) Single Ballot Style Special Election Specimen Ballot Booklet for more than 500,000 voters, 28 pages.
- 10) Single Ballot Style Special Election Specimen Ballot Booklet for 100,000 to 500,000 voters, 28 pages.
- 11) Single Ballot Style Special Election Specimen Ballot Booklet for 10,000 to 99,999 voters, 28 pages.
- 12) Single Ballot Style Special Election Specimen Ballot Booklet for less than 10,000 voters, 28 pages.
- 13) Single Ballot Style Special Election Specimen Ballot Booklet for more than 500,000 voters, 32 pages.
- 14) Single Ballot Style Special Election Specimen Ballot Booklet for 100,000 to 500,000 voters, 32 pages.
- 15) Single Ballot Style Special Election Specimen Ballot Booklet for 10,000 to 99,999 voters, 32 pages.
- 16) Single Ballot Style Special Election Specimen Ballot Booklet for less than 10,000 voters, 32 pages.

15. REPORTS AND DELIVERABLES

- A. The Contractor must print, address, prepare and deliver for mailing the preapproved and accurate Specimen Ballot Booklet for each and every active registered voter in Montgomery County, including voters with out-of-state and foreign mailing addresses, at the lowest possible cost and in compliance with all printing, production, U.S. Postal Service and schedule requirements.
- B. Contractor must also submit to the County the post-mailing U.S. Postal Service postage report upon completion of the mailing of the Specimen Ballot Booklets. The Contractor must submit to the Montgomery County Board of Elections all other reports and copies specified in this Contract, including required proofs and National Change of Address information.

16. PROOFS

Contractor must furnish timely a proof copy of all ballot styles and obtain authorization to print prior to production. Hard copy printed proofs of complete unaddressed Specimen Ballot Booklets for all unique Ballot Styles, and proofs of addressed mailer faces showing the final placement of accurate inkjet text for all unique Ballot Styles, are required under this Contract, with the decision of whether to accept an electronic proof in lieu of printed proofs at the sole discretion of the Montgomery County Board of Elections. The Montgomery County Board of Elections may require additional printed and/or electronic proofs in the event that a proof is rejected for any reason.

~~~~~ END OF SCOPE OF SERVICES ~~~~~