



## Contract

**Commodity or Service:** Request for Bid for the State of Wisconsin Department of Employee Trust Funds Electronic Printing and Mail Services

Request for Bid/Proposal No: ETB0004  
Amendment 2

The Statement Company, Inc

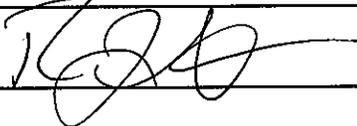
**Contract Period:** January 1, 2013 through December 31, 2013 with an option of three (3) one year renewals

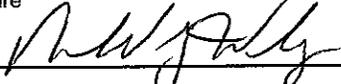
1. This contract is entered into by and between the State of Wisconsin, Department of Employee Trust Funds, and the contractor whose name, address, and principal officer appears below;
2. Whereby the Department of Employee Trust Funds, agrees to direct the purchase and the contractor agrees to supply the contract requirements cited above in accordance with the terms and conditions of the request for bid cited above, and in accordance with the contractor's bid submitted on this request for bid; which request for bid is hereby made a part of this contract;
3. In connection with the performance of work under this contract, the contractor agrees not to discriminate against any employees or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in s.51.01(5), Wis. Stats., sexual orientation as defined in s.111.32(13m), Wis. Stats., or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Except with respect to sexual orientation, the contractor further agrees to take affirmative action to ensure equal employment opportunities. The contractor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of the nondiscrimination clause.
4. Contracts estimated to be over twenty-five thousand dollars (\$25,000) require the submission of a written affirmative action plan. Contractors with an annual work force of less than twenty-five (25) employees are exempted from this requirement.  
  
Within fifteen (15) working days after the award of the contract, the plan shall be submitted for approval to the contracting agency. Technical assistance regarding this clause is provided by the Wisconsin Office of Contract Compliance, Department of Administration, P.O. Box 7867, Madison, WI 53707-7867, (608) 266-5462.
5. The order of precedence is: the official purchase order; this contract / Amendment 1 Discussion Items With OSG Statement Services Provided Answers and Comments dated November 22, 2011; Request for Bid (RFB) ETB0004 October 12, 2011 (including all appendices and amendments); Business Associate Agreement; and OSG Statement Services's response to RFB dated November 10, 2011.
6. This Amendment # 2 extends the contract for one year, January 1, 2013 through December 31, 2013. Reference Addendum 2, Cost Sheet ETB0004, "OSG Statement Service 2013 Rates" dated December 6, 2012. All other provisions of this contract unrelated to this Amendment remain in effect.

**Contract Number: ETB0004 Request for Bid for the State of Wisconsin Department of Employee Trust Funds Electronic Printing and Mail Services**

Request for Bid/Proposal: ETB0004 Amendment 2

The Statement Company, Inc

<b>State of Wisconsin Department of Employee Trust Funds</b>	
By Authorized Board (Name)	Employee Trust Funds Board
By (Name)	Robert J. Marchant
Signature	
Title	Deputy Secretary, Department of Employee Trust Funds
Phone	(608) 266-9854
Date (MM/DD/CCYY)	01-08-2013

<b>To be Completed by Contractor</b>	
Legal Company Name	The Statement Company, Inc
Trade Name	OSG Statement Services
Taxpayer Identification Number	39-1843177
Company Address (City, State, Zip)	16300 W Glendale Drive New Berlin WI 53151
By (Name)	Ronald J. Whaley
Signature	
Title	Chief Revenue Officer
Phone	201-871-1100
Date (MM/DD/CCYY)	12/12/12

Addendum 2

Cost Sheet ETB0004  
BASE BID:

OSG Statement Services 2013 Rates

Description	Estimated Quantity	Unit of Measurement Section A 1.3	Unit Cost	Total Cost	
Printing: Section C 1.6					
Annual Statement of Benefits (SOB)	0	Images	0.012 \$	-	
Test Fee for production			NA	NA	
Design of form			NA	NA	
Programming Fee			NA	NA	
Conversion Fee			NA	NA	
Provide Indexed PDF images with required sub folders for SOB reprints and archive Paper Costs (Section C 1.9)	0	per side of SOB	0.006 \$	-	new rate
	0	page	0.012 \$	-	
Folding (Section C 1.2.3)	0	page	0.007 \$	-	
Surcharge for Project Specification Change: Surcharge includes additional costs for paper, printing, programming, folding, and inserting.	0	14" paper	0.025 \$	-	
Inactive SOB -			NA	NA	
Alternate Payee SOB -			NA	NA	
Cost of Envelopes (Section C 1.10)	0	envelope	0.022 \$	-	
Inserting in vendor Supplied Envelopes	0	envelope	0.02 \$	-	
(Section C 1.2.4)			NA	NA	
Insert ET- 7333 -			NA	NA	
Insert ET-4927 -			NA	NA	
Insert ET2802 -			NA	NA	
Postage, pickup by UMS, meter at 5-digit rate	0	metered pieces	0.35 \$	-	
UMS Presort fee, pass through cost	0	pieces mailed	0.01 \$	-	added pass thru
Foreign Postage - Canada and Mexico	0	pieces mailed	0.85 \$	-	
Foreign Postage - International	0	pieces mailed	1.05 \$	-	
Ad hoc Costs, please specify					
Click-N-Ship materials	4' x 6" labels	for CnS Desktop	at cost \$	-	
	2-up labels	for CnS Online	at cost \$	-	
Hourly Programming Fee					
Reformat SOB with new record layout changes	\$	95 per hour	0 \$	-	
Create program for PDF indexing and output	\$	95 per hour	0 \$	-	
Create box labels and match packing instructions	\$	95 per hour	0 \$	-	
Load & hand deliver PDFs on USB Encrypted drive	\$	50 per hour	0 \$	-	
Additional Testing Fee					
Create 7 different proof versions for approval	\$	95 per hour	0 \$	-	
Subtotal as if all statements are to be direct mailed to participants				\$	-
It is possible the ETF will desire some or all of active participant statements (250,000) to be direct mailed as part of this bid. Under this scenario the subtotal listed above would be the cost of producing and direct mailing the statements to participants. The costs listed below this line are costs associated with bundling active statements and mailing via certified mail to the individual employers.					
Bundle and Package (Section C 1.3.2)	0	page	0.011 \$	-	
Certified Mail Preparation Costs (Section C 1.2.6)	0	Bundle	1.75 \$	-	new rate
Subtotal for bundling and mailing bundles				\$	-
<b>GRAND TOTAL BID</b>				\$	-

Company Name: OSG Statement Services

Plant Site Address:  
Street: 16300 W. Glendale Dr.

City / State / ZIP: New Berlin, WI 53151

Authorized Representative: Robert J. Syut  
Signature

Authorized Representative: Robert Syut  
Type or Print

Date: 12/06/2012