



## **STANDARD AGREEMENT**

(version 1-7-2021)

This AGREEMENT ("Agreement") is entered by and between **Level One LLC a Doxim Company** ("Contractor"), located at **53 General Warren Blvd, Malvern, PA 19355-3919** and the **City of League City** ("City"), a home-rule municipality, located at 300 W. Walker St., League City, Texas 77573 on the date set forth below.

### **Terms:**

1. **Scope of Services:** Contractor will perform the services and/or provide the products as set forth in **Exhibit A**, which is attached and incorporated herein, and which can be generally described as **Utility Billing Monthly Printing and Mailing**. If there is a conflict between the terms of this Agreement and Exhibit A, the terms of this Agreement will prevail.
2. **Term and Termination:** This Agreement shall commence on **October 1, 2021** and shall expire on **September 30, 2024**. The period from commencement to expiration is the Contract Term. City reserves the right to terminate this Agreement for convenience upon seven (7) days written notice to Contractor. Upon such termination, City shall pay Contractor, at the rate set out in **Exhibit A**, for services satisfactorily performed or products satisfactorily provided up through the date of termination. Notwithstanding any provision in this Agreement to the contrary, City will not be required to pay or reimburse Contractor for any services performed or for expenses incurred by Contractor after the date of the termination notice that could have been avoided or mitigated by Contractor.
3. **Compensation:** Contractor shall be paid for the services/products as set forth in **Exhibit A**. In no event shall the total compensation exceed **\$655,415.00** during the term of this Agreement. City shall tender payment (including progress/partial payments) for services/goods only after such services are completed or goods are delivered and are deemed to be acceptable under this Agreement, in the sole reasonable discretion of City. Contractor must submit to City invoices for all goods delivered and services provided, which invoices must include details and dates of service or delivery. Payment by City shall be made within thirty (30) days of receipt of an invoice, except for any portion of the invoiced amount that City disapproves as not compliant under this Agreement, in the sole reasonable discretion of City. If City disapproves any amount submitted for payment by Contractor, City shall give Contractor specific reasons for disapproval in writing.
4. **Insurance:** Contractor is required during the Contract Term to maintain insurance as follows: (a) Comprehensive General Commercial Liability insurance covering bodily injury and property damage, with minimum coverage limits—exclusive of defense costs—of \$1,000,000 per occurrence and \$2,000,000 aggregate; (b) If Contractor will provide City "professional services," as that term is used in Chapter 252 of the Texas Local Government Code, Professional Liability (errors and omissions/malpractice) insurance with minimum coverage limits—exclusive of defense costs—of \$2,000,000 per occurrence; and (c) If at any point during the Contract Term it is foreseeable that Contractor will enter upon City premises: (i) Worker's Compensation coverage with statutory limits for the State of Texas, and (ii) Commercial Automobile Liability coverage with minimum coverage limits—exclusive of defense costs—of \$1,000,000 per occurrence and \$2,000,000 aggregate. All policies must contain a waiver of subrogation against City. Comprehensive General Liability and Commercial Automobile Liability policies must name the City as Additional Insured. Contractor shall pay all insurance deductibles and deductibles must not exceed \$10,000.

unless approved in advance by City. Contractor shall provide City Certificates of Insurance evidencing these insurance requirements prior to the start of work.

5. **Liquidated Damages:** Contractor acknowledges that time is of the essence in performing this Agreement. City and Contractor (collectively, the “Parties”) agree that if Contractor is late in performing any obligation of this Agreement, City will suffer loss, damages, or other harm from Contractor’s delay. The Parties agree that the amount of loss, damages, or harm likely to be incurred is incapable or difficult to precisely estimate, and therefore Contractor agrees to pay City liquidated damages for delay at a daily rate equal to the total compensation allowed under the Agreement divided by the number of days in the Contract Term. The Parties further agree that: (i) the liquidated damages specified herein are not a penalty but rather bear a reasonable relationship to, and is not plainly or grossly disproportionate to, the probable loss likely to be incurred by City as a result of Contractor’s delay; (ii) one of the reasons for City and Contractor to agree to such amounts is the uncertainty and cost of litigation regarding the question of actual damages; and (iii) City and Contractor are sophisticated business parties and negotiated this Agreement at arm’s length.
6. **Independent Contractor:** Contractor is an independent contractor and is not an employee, partner, joint venture, or agent of City. Contractor understands and agrees that he/she will not be entitled to any benefits generally available to City employees. Contractor shall be responsible for all expenses necessary to carry out the services under this Agreement and shall not be reimbursed by City for such expenses except as otherwise provided in this Agreement.
7. **Intellectual Property:** This Agreement shall be an Agreement for services and the parties intend and consider any work created as a result of this Agreement, including any and all documentation, images, products or results, to be a work (the “Work”) for hire under federal copyright law. Ownership of the Work shall belong to and remain the exclusive property of City. The Work may be edited at any time within City’s discretion. If the Work would not be considered a work-for-hire under applicable law, Contractor hereby assigns, transfers, and conveys any and all rights, title and interest to City, including without limitation all copyrights, patents, rights of reproduction, rights to ownership, and right to secure registrations, renewals, reissues and extensions thereof. As the sole copyright holder of the Work, City maintains and asserts the rights to use, reproduce, make derivative works from, and/or edit the Work in any form of medium, expression or technology now known or hereafter developed, at any time within City’s discretion. Contractor shall not sell, disclose or obtain any other compensation for the services provided herein or the Work. If the Work is one to which the provisions of 17 U.S.C. § 106A apply, Contractor hereby waives and appoints City to assert on Contractor’s behalf Contractor’s moral rights or any equivalent rights regarding the form or extent of any alteration to the Work (including, without limitation, removal or destruction) or the making of any derivative works based on the Work, including, without limitation, photographs, drawings or other visual reproductions of the work, in any medium, for City’s purposes.
8. **Confidentiality:** During the course of the services to be provided under this Agreement, Contractor may become privy to confidential information of City. Contractor agrees to treat as confidential the information or knowledge that becomes known to Contractor during performance of this Agreement and to not use, copy, or disclose such information to any third party unless authorized in writing by City. This provision does not restrict the disclosure of any information that is required to be disclosed under applicable law. Contractor shall promptly notify City of any misuse or unauthorized disclosure of City’s confidential information and upon expiration of this Agreement shall return to City all confidential information in Contractor’s possession or control. Contractor shall further comply with all information security policies of City that may apply and shall not make any press releases, public statements or advertisement referring to the services provided under this Agreement or the engagement of Contractor without the prior written approval of City.
9. **Warranties and Representations:** Contractor warrants and agrees that Contractor shall perform its services and conduct all operations in conformity with all applicable federal, state, and local laws, rules, regulations, and ordinances. For any service performed on premises owned or controlled by City,

Contractor warrants and agrees that Contractor will perform said services in compliance with all City rules, including but not limited to, prohibitions related to tobacco use, alcohol, and other drugs.

10. **Licenses/Certifications:** Contractor represents and warrants that it will obtain and maintain in effect, and pay the cost of, all licenses, permits or certifications that may be necessary for Contractor's performance of this Agreement. If Contractor is a business entity, Contractor warrants, represents, covenants, and agrees that it is duly organized, validly existing and in good standing under the laws of the state of its formation; and is duly authorized and in good standing to conduct business in the State of Texas, that it has all necessary power and has received all necessary approvals to execute and deliver the Agreement and is authorized to execute this Agreement according to its terms on behalf of Contractor.
11. **Performance/Qualifications:** Contractor agrees and represents that Contractor has the personnel, experience, and knowledge necessary to qualify Contractor for the particular duties to be performed under this Agreement. Contractor warrants that all services performed under this Agreement shall be performed consistent with generally prevailing professional or industry standards.
12. **Conflict of Interest:** Contractor warrants, represents, and agrees that Contractor presently has no interest and shall not acquire any interest, direct or indirect, that would conflict in any manner or degree with Contractor's performance of the services hereunder. Contractor further warrants and affirms that no relationship or affiliation exists between Contractor and City that could be construed as a conflict of interest with regard to this Agreement.
13. **INDEMNIFICATION: CONTRACTOR SHALL DEFEND, INDEMNIFY AND HOLD HARMLESS CITY , AND EACH OF ITS OFFICIALS, OFFICERS, AGENTS AND EMPLOYEES FROM AND AGAINST ALL CLAIMS, ACTIONS, SUITS, DEMANDS, PROCEEDINGS, COSTS, DAMAGES AND LIABILITIES, INCLUDING WITHOUT LIMITATION ATTORNEYS' FEES AND REASONABLE LITIGATION COSTS, ARISING OUT OF, CONNECTED WITH, OR RESULTING FROM ANY ACTS OR OMISSIONS OF CONTRACTOR OR ANY AGENT, EMPLOYEE, SUBCONTRACTOR, OR SUPPLIER OF CONTRACTOR IN THE EXECUTION OR PERFORMANCE OF THIS CONTRACT, TO THE EXTENT THE CLAIM ARISES FROM NEGLIGENCE, WILLFUL ACT, BREACH OF CONTRACT OR VIOLATION OF LAW.**
14. **Force Majeure:** Neither City nor Contractor shall be liable for any delay in the performance of this Agreement, nor for any other breach, nor for any loss or damage arising solely from uncontrollable forces such as fire, theft, storm, war, or any other force majeure that could not have been reasonably avoided by the exercise of due diligence.
15. **Notices:** Any notice given under this Agreement by either party to the other may be affected either by personal delivery in writing or by mail, registered or certified postage prepaid with return receipt requested. Mailed notices shall be addressed to the addresses of the Parties as they appear in the contract. Notices delivered personally shall be deemed communicated at the time of actual receipt. Mailed notices shall be deemed communicated three (3) days after mailing.

16. **Texas Family Code Child Support Certification:** Pursuant to Section 231.006 of the Texas Family Code, Contractor certifies that it is not ineligible to receive the award of or payments under the Agreement and acknowledges that the Agreement may be terminated, and payment may be withheld if this certification is inaccurate.
17. **State and/or City Auditor:** Contractor understands that acceptance of funds under the Agreement constitutes acceptance of the authority of the Texas State Auditor's Office, or any successor agency or the City's internal auditor (collectively, the "Auditor"), to conduct an audit or investigation in connection with those funds. Contractor agrees to cooperate with the Auditor in the conduct of the audit or investigation, including without limitation providing all records requested. Contractor will include this provision in all contracts with permitted subcontractors.
18. **Jurisdiction:** Any disputes under this Agreement shall be brought in a court of competent jurisdiction in Galveston, Texas and governed by Texas law.
19. **Alternative Dispute Resolution:** To the extent that Chapter 2260, Texas Government Code, is applicable to this Contract and is not preempted by other applicable law, the dispute resolution process provided for in Chapter 2260 and the related rules adopted by the Texas Attorney General Pursuant to Chapter 2260, shall be used by City and Contractor to attempt to resolve any claim for breach of contract made by Contractor that cannot be resolved in the ordinary course of business. The Director of Finance of City shall examine Contractor's claim and any counterclaim and negotiate with Contractor in an effort to resolve such claims. This provision shall not be construed as a waiver by City of its right to seek redress in the courts.
20. **Entire Agreement:** This Agreement contains the entire understanding between the Parties and supersedes all prior agreements, arrangements, and understanding, oral or written between the Parties relating to this Agreement. This Agreement may not be modified except by mutual written agreement of the Parties executed subsequent to this Agreement.
21. **Eligibility to Receive Payment:** Contractor certifies that, as a matter of state law, it is not ineligible to receive the Agreement and payments pursuant to the Agreement and acknowledges that the Agreement may be terminated, and payment withheld if this representation is inaccurate.
22. **Payment of Debt/Delinquency to State:** Contractor certifies that it is not indebted to the City of League City and is current on all taxes owed to the City of League City. Contractor agrees that any payments owing to Contractor under the Agreement may be applied directly toward any debt or delinquency that Contractor owes the City of League City regardless of when it arises, until such debt or delinquency is paid in full.
23. **Products and Materials Produced in Texas:** If Contractor will provide services under the Agreement, Contractor covenants and agrees that in performing its duties and obligations under the Agreement, it will purchase products and materials produced in Texas when such products and materials are available at a price and delivery time comparable to products and materials produced outside of Texas.
24. **Risk of Loss:** If applicable, all work performed by Contractor pursuant to the Agreement will be at Contractor's exclusive risk until final and complete acceptance of the work by City. In the case of any loss or damage to the work prior to City's acceptance, bearing such loss or damage will be Contractor's responsibility.
25. **Publicity:** Contractor shall not use City's name, logo or likeness in any press release, marketing materials or other public announcement without receiving City's prior written approval.
26. **Legal Construction/Severability:** In the event that any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality or unenforceability shall not affect any other provision, and this Agreement shall be construed as if such invalid, illegal or unenforceable provisions had never been contained in it. To this end, the

provisions of this Agreement are declared to be severable. The Parties may mutually agree to renegotiate the Agreement to cure such illegality/invalidity or unconstitutionality if such may be reasonably accomplished.

27. **Limitations:** The Parties are aware that there are constitutional and statutory limitations on the authority of City to enter into certain terms and conditions of the Agreement, including, but not limited to, those terms and conditions relating to liens on City's property; disclaimers and limitations of warranties; disclaimers and limitations of liability for damages; waivers, disclaimers and limitations of legal rights, remedies, requirements and processes; limitations of periods to bring legal action; granting control of litigation or settlement to another party; liability for acts or omissions of third parties; payment of attorneys' fees; dispute resolution; indemnities; and confidentiality (collectively, the "Limitations"). Any terms and conditions related to the Limitations will not be binding on City except to the extent authorized by the laws and Constitution of the State of Texas.
28. **Sovereign Immunity:** The Parties agree that neither the execution of the Agreement by City nor any other conduct, action or inaction of any City representative relating to the Agreement constitutes a waiver of sovereign immunity by City.
29. **Authority:** Contractor warrants and represents that Contractor has full power and authority to enter into and perform this Agreement and to make the grant of rights contained herein. The person signing on behalf of City represents that he/she has authority to sign this Agreement on behalf of City.
30. **Non-Waiver:** The Parties specifically agree that neither the occurrence of an event giving rise to a breach of contract claim nor the pendency of a claim constitute grounds for the suspension of performance by Contractor. No covenant or condition of this Agreement may be waived except by written consent of the waiving party. Forbearance or indulgence by one party in any regard whatsoever shall not constitute a waiver of the covenant or condition to be performed by the other party.
31. **Prohibition on Boycotting Israel:** Pursuant to Section 2270.002 of the Texas Government Code, by executing this Agreement Contractor verifies that Contractor: (1) does not boycott Israel; and (2) will not boycott Israel during the term of this Agreement.
32. **Prohibition Against Business with Iran, Sudan or Foreign Terrorists Organizations:** Contractor warrants, covenants, and represents that Contractor is not engaged in business with Iran, Sudan, or any company identified on the list referenced in Section 2252.152 of the Texas Government Code.

*(signature block on next page)*

**Executed on** \_\_\_\_\_. *(date to be filled in by City Secretary)*

**LEVEL ONE, A DOXIM COMPANY - “Contractor”**

\_\_\_\_\_  
John P Boland, President

**CITY OF LEAGUE CITY – “City”**

\_\_\_\_\_  
John Baumgartner, City Manager

**Attest:**

\_\_\_\_\_  
Diana Stapp, City Secretary

**Approved as to Form:**

\_\_\_\_\_  
Office of the City Attorney

# Exhibit A

## Scope of Services/Description of Products/Payment Schedule

(There are **30** pages for Exhibit A, including this page)

Printing and mailing of utility bills for the city's Utility Billing Department. Service to include print file manipulation, material, laser printing and mail utilization digit automation for post discount rates.

Proposal for

# League City, Texas

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**RFP#21-027**

Utility Billing Monthly Printing and Mailing

**Due Date**

May 18, 2021 at 10:00 a.m. CDT



Billing | Payments | Communications

**Point of Contact:**

Harry Vasquez, MBA, Customer Success  
Manager  
5444 Westheimer, Suite 1000  
Houston, Texas, 77056  
Office: 713-335-5509  
Mobile: 713-320-9956  
[harry.vasquez@GoLevelOne.com](mailto:harry.vasquez@GoLevelOne.com)

**Executive Sponsor:**

John P. Boland, General Manager  
53 General Warren Blvd.  
Malvern, PA 19355  
610-229-9290  
[john.boland@GoLevelOne.com](mailto:john.boland@GoLevelOne.com)







**Corporate Headquarters**  
53 General Warren Blvd.  
Malvern, PA 19355  
610.229.9200  
GoLevelOne.com

May 18, 2021

City of League City  
Purchasing Department  
144 Park Ave, Suite 100  
League City, TX 77573

**Re: Proposal for City of League City, Utility Billing Monthly Printing and Mailing**

Dear Purchasing

Level One LLC is a Doxim Company ("Level One") thanks the League City's evaluation team for the time that will be invested in evaluating this proposal for Utility Billing, Monthly Printing, and Mailing. Our response will demonstrate that we bring both a solution designed to help you exceed your communications goals, as well as a set of services to ensure your long-term success. The utility industry focus combined with experience integrating with Tyler Munis makes Level One uniquely qualified as the League City's business partner.

For more than 17 years, we have gained the trust of over 2,500 customers who service millions of members like yours. In addition, to the experience Level One is financially sound and is backed by a \$185 million company, Doxim. Level One ensures that customer information and data is managed securely, processed accurately, that application modifications are installed correctly, and that programs are implemented flawlessly.

Upon request, Level One can provide a demo of our proprietary OneVIEW Suite.

**Your point of contact will be:**

Harry Vasquez, MBA, Customer Success Manager  
harry.vasquez@GoLevelOne.com  
Office: 713-335-5509  
Mobile: 713-320-9956

**Person authorized to contractually obligate Level One:**

John P. Boland, General Manager  
john.boland@GoLevelOne.com  
Phone: 610-229-9290  
53 General Warren Blvd.  
Malvern, PA 19355

I look forward to discussing our proposal provided, answering any questions, and providing additional details about our solution so that we can demonstrate our experience and preparedness to deliver utility bill printing and mailing services for League City.

Sincerely,

John Parker Boland, General Manager  
610-229-9290  
john.boland@GoLevelOne.com

## Table of Contents

<b>TAB A – ORGANIZATION AND QUALIFICATIONS .....</b>	<b>4</b>
A. ORGANIZATION .....	4
B. QUALIFICATION.....	8
<b>2. TAB B – SERVICE QUALITY .....</b>	<b>12</b>
<b>3. TAB C – PRODUCT APPEARANCE &amp; QUALITY .....</b>	<b>17</b>
<b>4. TAB D – PRICING .....</b>	<b>18</b>
<b>5. TAB G – FORMS (ATTACHMENT A) .....</b>	<b>19</b>

## Table of Figures

Figure 1. Reference 1 – City of Pasadena.....	9
Figure 2. Reference 2 – Houston Public Works.....	10
Figure 3. Reference 3 – City of Galveston .....	11
Figure 4. Processing Workflow Diagram .....	14
Figure 5. OneVIEW® Archive Module .....	15
Figure 6. OneVIEW® Email Duplicate Bill .....	16
Figure 7. Level One's Production Network .....	16

## Tab A – Organization and Qualifications

### *a. Organization*

1. Provide a brief description and history of the company including current size and how many persons in the company are to be directly engaged in the proposed services.

#### *Brief History*

Founded in 2004, Level One is a single-source provider of document management solutions for utilities and was among the first in the industry to provide document creation as a service (DCaaS) and cloud-based Customer Communication Management (CCM) solutions. Level One maintains its headquarters in Malvern, Pennsylvania, with offices in Atlanta, Houston and Philadelphia. In March 2021, Level One provides operational, technical, project management and regulatory expertise in support of hosted document composition, data processing, print and mail management, e-presentment, e-payments, and processing, printing and mailing of mission-critical customer communications.

In March 2021, Level One was acquired by Doxim. Together we have over 800 employees across the United States and service over 2,500 customers just like the City of League City. Learn more at [www.golevelone.com](http://www.golevelone.com).

2. Include the names, qualifications, years of experience and other detailed background information of the local management team directly responsible for local operations.

The primary staff that will be assigned to the City of League City account has an average of 20 years of experience. The key management team members each have 25+ years of experience in business process outsourcing of customer billing and communications. Level One LLC a Doxim Company includes résumé summaries of key personnel for review.

#### *John Parker Boland, General Manager*



As the Senior Vice President of Doxim and General Manager of Level One, John is responsible for steering Level One's business innovation and strategy. He works closely with customers to effectively meet their IT business needs, through an understanding of their business vision and goals. John co-founded Level One in 2004 and drove the company's growth into a leading provider and integrator of customer communication solutions and technology for clients nationwide.

John is a leader in providing innovative and strategic document management solutions to customers. He brings broad experience in all aspects of document management and business process outsourcing solutions. John will serve as the Executive Sponsor. He has significant experience managing the development and delivery of customer experience applications, including expertise in document redesign best practices, document automation, e-billing, and e-payments. John earned his Bachelor of Arts degree in Business, Marketing/Management from the Holy Family University in Philadelphia, PA.

***Kate, Vice President, Information Services***



Kate has been with Level One since 2011, first as a Product Manager focusing exclusively on the utility services market, and now leading Level One LLC a Doxim Company's Information Services team. Kate has over 20 years of experience with information technology implementation and customer relationship management and 30 years of technical management and staff supervision experience.

Kate has achieved success managing critical account relationships with a strong technical background in software solutions assessment, implementation, training, support, application, and product development and delivery.

Kate earned her Bachelor of Arts in Design and Computer Application from the University of Notre Dame in Notre Dame, IN

***Karen, Manager, Client Success Team***



Karen has been with Level One since 2019 and brings over twenty years of information technology experience. Expertise includes creating motivated technical teams, knowledgeable in document creation and management workflows, revenue cycle and financial applications, implementation of ITIL best practices for incident and problem management, technical support processes and procedures, establishing and reporting KPIs for performance management, and strong customer engagement. Experienced in software sales and implementation support, software testing, training, and product and project management.

Areas of Expertise include: Incident and Problem Management, Root Cause Analysis, Process Improvement, Customer Engagement, Technical Support, Quality Assurance and Testing, Project Management, Performance Management, Team Management

Specialties include: ITIL Foundations, Sprint/Scrum/Agile knowledge, Microsoft certified, Document Imaging certified

***Harry F. Vasquez, Customer Success Manager (POC – 713-320-9956)***



Harry brings 25 years of experience in sales management, operations, expertise in most aspects of Mail Management, output, and imaging solutions that include Xerox, Pitney Bowes, Bell & Howell, Komori, Heidelberg, Workflow, Exstream-Dialogue, EMC Mail & Print Output software and solutions. Harry has experience in the following vertical markets: utility industry, finance, healthcare, manufacturing, energy and government business sectors. Harry has an excellent working relationship with the US

Postal Service leadership team and is a capable team-oriented leader with skills at contracting and SOW compilation, managing large print/mail project initiatives from a sales and customer advocate perspective and the ability to transfer job knowledge to all levels through mentoring, coaching, and teaching.

***Dennis, Client Success Manager – (Project Manager)***



Dennis has 30 years of experience in the printing and mailing industry. Dennis has specialized in Utility Bill Print Outsourcing since 1992. During that time, he has successfully managed implementations and on-going support for close to 30 utility clients. Dennis Earned his Bachelor of Arts in Business Administration from West Chester University in West Chester, PA Key projects include:

- Summer 2019: Successfully managed bill print implementation for 300,000 account customer moving away from existing bill print provider
- Ongoing: Acts as primary POC for ongoing print management support for this customer
- Ongoing: Provides day-to-day support for 900,000 account across eight states
- December 2019 – February 2020: On schedule - coordinating new implementation for existing utility undergoing a redesign and converting to a new data type
- 2020: Implemented 2 utility bill print and mail clients, 1 city tax agency and 1 Utility Electronic Bill Presentment client
- 2021: Implemented 1 utility bill print and mail client, 1 Utility Electronic Bill Presentment and Payment client

***Bret, Client Success Manager / Project Management Coordinator***



Bret has over 20 years of client service experience in various industries including print and mail, collections, and healthcare. Bret has more than seven years of experience with IT project management supporting cross functional teams of subject matter experts, senior managers and key stakeholders with a proven track record of delivering products and solutions with aggressive deadlines. Key projects include:

- Summer 2019: Successfully managed bill print implementation for 350,000 account customer migrating from a legacy COBOL system
- December 2019 – February 2020: Completed and successfully managed new implementation for an existing customer delivering targeted go-live despite data delays
- Winter 2021: Completed and Successfully managed sewer and tax bill print implementation for new customer that was with previous vendor over 10 years.
- Ongoing: Acts as primary POC for several high-profile print and mail customers.
- SME on the Level One OneVIEW product: QA, Archive, CCM Messaging and Insert modules.

***Jim, Client Services/Client Success Manager and Quality Assurance Lead***



Jim has 20 years of experience as client account manager, responsible for maintaining standard QA processes, methodologies, and templates for use on client deliverables. He actively monitors and prioritizes project implementations and change control for the client to ensure quality results are delivered on time and within budget. Key projects include:

- Summer 2019: Successfully managed Electronic Billing Presentment and Payment Customer portal roll out for 300,000 account migrating away from current payment provider
- Ongoing: Acts as primary POC for ongoing customer porta support for this client
- Ongoing: Provides day-to-day support for accounts requiring specialized custom code changes
- November 2019 – March 2020: On schedule and successfully supporting current customer migration through organizational change due to bankruptcy. Assisting with all aspects of navigating need to change and update logos, addresses, websites etc.

***Chris P., Lead Application Developer***

Chris has more than 18 years of experience coding, testing, maintaining, and documenting the application program code using all types of data formats to create utility bill images in support of multi-channel document delivery. Chris provides training and oversight to the development team, ensuring best practice application development and ensuring highest quality customer service delivery. In his role as team lead, Chris oversees and is involved in all application development in support of new utility bill print implementations. Chris earned his Bachelor of Science in Computer Science from West Chester University, West Chester, PA.

***Zach, Application Developer / IVR Specialist***

Zach brings three years of experience as a programmer in document creation, delivery and implementation. His background includes document programming, implementation coordinator, and IVR programmer.

***Matt, Information Design Specialist and Graphics Services***

Matt has more than 12 years of experience with Level One LLC a Doxim Company as graphic and U/I designer. Matt maintains a broad range of design skills that include document design for multi-channel document delivery and utility statement redesign. Matt is a skilled U/I web designer, SEO website analyst and HTML coder.



## ***b. Qualification***

1. Provide supporting documentation that your software is compatible with Tyler Munis.

Level One’s focus on the utility vertical has allowed us to build a solid reputation among the major CIS providers and consulting firms that implement their products including Oracle CC&B /C2M, SAP, Hansen Technologies Banner, Harris Utilities which include Advanced, NorthStar, Software & Systems, Cogsdale and Cayenta, Tyler Technologies MUNIS and SunGard HTE.

Level One processes millions of multi-channel customer communications for utilities and municipalities across the United States and offers a full complement of billing, payment and customer preference options that include:



### **Delivery Channels**

- Paper
- Web (Biller Direct)
- Mobile
- SMS Text
- Smart Phone App

### **Notification Types**

- Outages
- Billing
- Payment
- News
- Usage
- Confirmations

### **Payment Options**

- Online
- SMS Text
- IVR
- Agent
- Walk-in Retail
- Kiosk

### **Payment Types**

- ACH e-Check
- Credit/Debit
- Cash

2. Discuss the company’s prior service experience in providing the proposed service to other organizations of comparable size.

### ***Solutions Built Specifically for Utilities***

The services outlined in this RFP is well matched with Level One’s expertise in managing utility bill printing and mailing services. Level One understands the utility customer journey and the customer experience challenges that municipal utilities face providing quick and responsive service. As a result, Level One has developed its solutions specific to the unique requirements of the metered services industry.

Our depth of expertise in the utility market is unparalleled. Our management team has been helping utilities navigate the rapidly evolving billing and payment landscape. Throughout this time, we’ve proven the power of our solutions to drive new cost savings and efficiencies, accelerate payments and increase customer satisfaction.

Today, water, gas and electric utilities across the country rely on Level One to support their multi-channel billing, payments and customer engagement strategies with industry leading security, compliance, and continuity solutions.

Level One a Doxim company has over 2,500 customers across the continental United states just like the City of League City.

3. Provide a list of all municipal customer contracts in Texas where utility billing printing and mailing services were provided.

Level One has contracts with the City of Pasadena, City of Galveston, City of Houston, and City of Lubbock.

4. Provide references for similar successful projects from three (3) governmental agencies, including name of agency, contact name, telephone, and email address.

Level One provides references in Figure 1, 2, 3.

**Figure 1. Reference 1 – City of Pasadena**

City of Pasadena (45,000 Customers)	
Contact Name	Sylvia Mourtakos
Contact Title	Utility Billing Director
Address	1202 Southmore, Pasadena, TX 77502
Telephone	713-475-5504
Email	smourtakos@ci.pasadena.tx.us
Length of Service	Since May 2019
Key Project Team	John Boland, President Kate Lindstrom, Vice President Information Services Karen Angelucci, Manager, Client Success Team Dennis Hopton, Client Success Manager

Level One assumed print and mail production from the City of Pasadena. Prior to the engagement with Level One, City resources were tasked with printing and mailing operations. Level One's OneVIEW® suite including QA, Archive, CCM® to better manage day-to-day operations in support of customer service. Level One also worked with the City to provide a new bill design that incorporates full color print production and targeted on-bill messages. The City has engaged Level One to offer EBPP solutions to their residential and commercial customers in the 4th quarter of 2020.



**Figure 2. Reference 2 – Houston Public Works**

<b>Houston Public Works (525,500 Customers)</b>	
Contact Name	Erik K. Dunn
Contact Title	Customer Billing & Call Center Operations
Address	4200 Leeland Street, Houston, TX 77023
Telephone	832-395-6219
Email	erik.dunn@houstontx.gov
Length of Service	Since 2017
Contract Amount	\$541,000 per year
Key Project Team	Bret Krowka, Client Success Manager John Boland, President Kate Lindstrom, Vice President Information Services Karen Angelucci, Manager, Client Success Team Dennis Hopton, Client Success Manager

Level One was awarded a multi-year contract following the City's rigorous RFP and onsite presentation process. A successful Go-Live was achieved in May 2017 following a 60-day implementation plan for processing paper bill, e-bill and letter files. The City of Houston invoices for water, sewer and drainage services. In addition to billing documents Level One prints and mails a variety of customer service letters. All documents are processed, printed and mailed with a Same Day SLA.

The Houston's Utility Customer Service (UCS) team utilizes the OneVIEW® Suite for:

- Unit Acceptance Testing (UAT) - The UCS testing team accessed daily parallel print files to validate bill composition and billing detail integrity. This was a 3-week process that proved invaluable to completing UAT and keeping to the implementation schedule.
- Production QA Review – The UCS team completes a daily file review and approval. Records are reviewed, approved and mailed same day.
- Archival – Bill and letter images are made available to the UCS team via the OneVIEW® interface. In addition, Level One supports an API for bill retrieval from the customer access center. This allows end consumers an opportunity to view their billing documents.
- CCM – Targeted message content (text and graphics) are easily managed and maintained via an easy-to-use customer interface. Changes to targeted messaging can be tested and promoted into live production the same day of making a change.

**Figure 3. Reference 3 – City of Galveston**

City of Galveston (21,500 Customers)	
Contact Name	Mike Abner
Contact Title	Utility Customer Service Manager
Address	823 Rosenberg Galveston, TX 77550
Telephone	409-797-3548
Email	mabner@galvestontx.gov
Length of Service	Since 2019
Key Project Team	John Boland, President Kate Lindstrom, Vice President Information Services Karen Angelucci, Manager, Client Success Team Dennis Hopton, Client Success Manager

Level One assumed print and mail production from the City of Galveston. Prior to the engagement with Level One, City resources were tasked with printing and mailing operations. Level One's OneVIEW® suite including QA, Archive, CCM® to better manage day-to-day operations in support of customer service. The City and Level One are completing a bill redesign in the summer of 2020.

## 2. TAB B – Service Quality

### a. Explain the process of service between the City and the designated account manager

For the duration of the entire project, Level One will provide a dedicated project manager engaged as the primary point of contact for managing schedule, resources, deliverables and activities with respect to Level One's professional services. The assigned project manager will be responsible for coordinating all project communications.

The Level One project manager will:

- Be the designated Level One point of contact for the entire project tracking Level One work deliverables within the SOW
- Plan, estimate, and document a schedule for the tasks for the services
- Review/develop project design, and obtain customer approval and signoff
- Schedule Level One project resources and communicate the schedule to City of League City
- Facilitate regular status meetings as required providing a video call in number
- Facilitate project closure meeting and documentation handover
- Will work with customer project manager to ensure alignment and working from single joint project plan

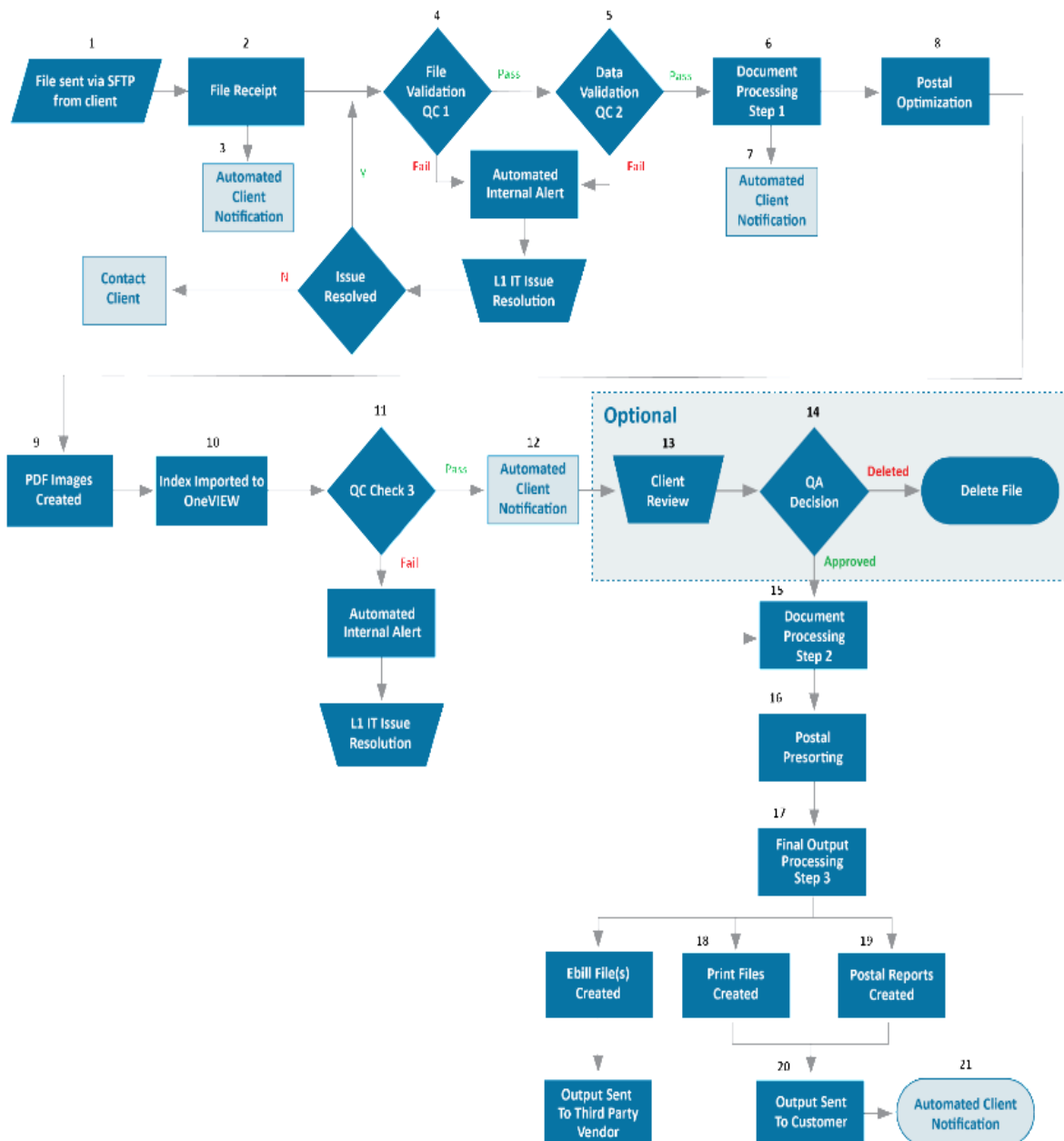
### b. Provide a timeline from receiving bill file to printing and mailing statements to ensure the City stays on track of calendar dates.

Level One file processing workflows follows a 21-step process outlined below. The workflow includes sophisticated quality control checks through processing, from file receipt through print file creation and archival. Figure 4. details typical quality control checks during file processing.

1. Files are transmitted from City of League City to Level One via SFTP
2. Level One monitors designated client folder for successful file receipt
3. **Client Notification:** Automated email is sent to client confirming file receipt
4. **QC Check 1:** Files are validated - A duplicate file check is run on the file. If a duplicate is detected, an internal notification is sent, and file status is investigated
5. **QC Check 2:** Data is validated - A minimum size check is run on the file to the file contains actual customer data and is not an empty file. If an error is detected, an internal notification is sent, and file status is investigated
6. Start of the document composition process
7. **Client Notification:** An automated email is optional and is sent to the client confirming the initiation of the document composition process
8. Postal optimization: Address Correction (ACE) and NCOA processing
9. Document PDFs are created for optional QA review process

10. Document images and indexes are imported into OneVIEW client application portal
11. **QC Check 3:** Record level checks are run on the files
12. **Client Notification:** An automated email is sent to the client confirming that the file is ready for client QA review; this process is optional
13. Client is given the opportunity to perform a QA review of (1) all records; or (2) subset of records of that meet specific criteria as defined by client (i.e. Intercepts and exceptions)
14. Upon review, client has the option to (1) change the delivery disposition of individual records (i.e. Intercepts and exceptions) prior to approval and release for production; (2) approve and release entire file for production (3) delete entire file
15. Upon client approval (if required), final processing and print file splits are completed
16. Postal optimization: Postal presorting process
17. The final output processing steps are completed
18. **QC Check 4:** Print files are created and final production counts are verified
19. Postal reports are created including Mail.DAT package, Tray tags and Placards
20. Print files and postal reports are sent back to City of League City
21. **Client Notification:** An automated email is sent confirming SFTP transmission of daily production files to City of League City; email contains detailed production totals including page counts, mail piece counts and A/R totals broken out by file split, intercept and exception codes.

**Figure 4. Processing Workflow Diagram**



c. Provide details for a customer portal of how the City can review account activity.

Level One's OneVIEW® application provides the tools you need to effectively manage multi-channel communications. With a single sign on, our online toolset provides command, control and visibility to multi-channel document delivery, comprehensive tracking of file processing in both production and test environments, quality assurance, archival, content management, insert management and reporting.

OneVIEW® provides a suite of modules for your business to seamlessly manage customer interactions end-to-end—all through a single interface that simplifies monitoring and control.



QUALITY ASSURANCE



ARCHIVE



CUSTOMER ENGAGEMENT



EBILLING AND PAYMENTS

Everything you need—all in one place

d. Provide details for how the City can view current and previous invoices.

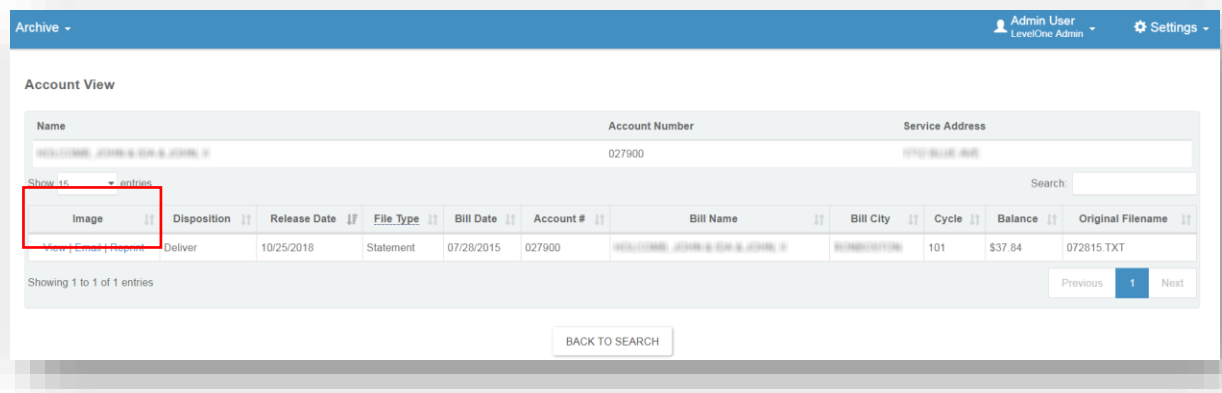
### **OneVIEW® Archive Module**

Archival standard features include but are not limited to:

- Documents are archived in chronological order.
- Documents are searchable by multiple queries.
- City call center agents can generate print or send email from an archive file.
- There is no limitation to the number of years documents can be archived and made available online.

Figure 5. provides a screen shot of the OneView® Archive Module.

**Figure 5. OneVIEW® Archive Module**



Duplicate document requests are easily fulfilled via email on demand as shown in Figure 6.

**Figure 6. OneVIEW® Email Duplicate Bill**

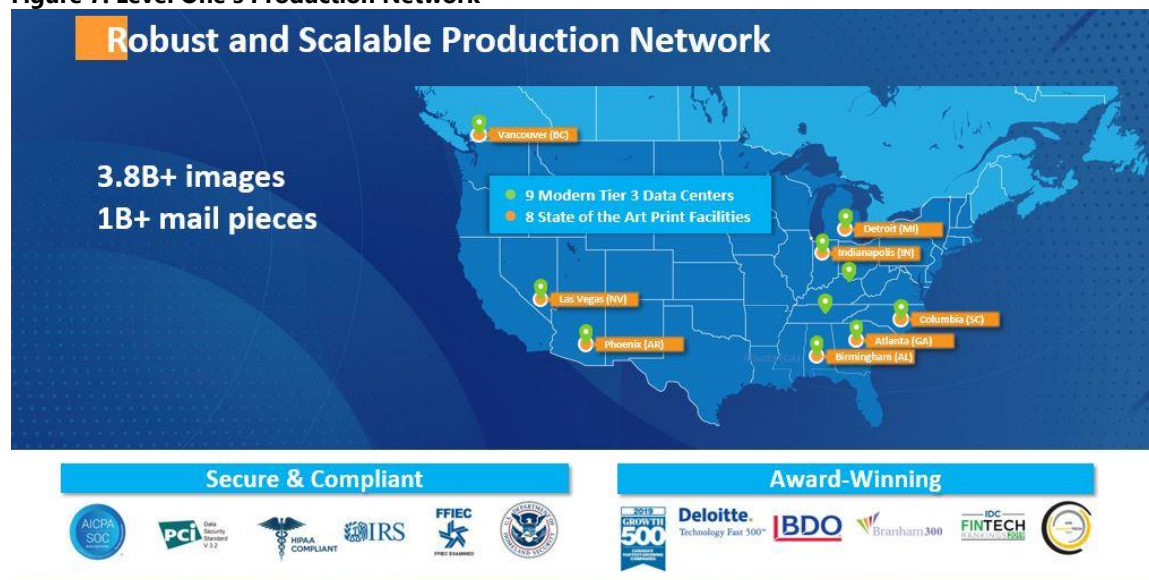
The screenshot shows a web form titled "Email Duplicate Bill". It contains the following fields and elements:

- From:** A text field with a placeholder email address.
- To:** A text field with a note below it: "\* use a semicolon to separate multiple email addresses."
- Subject:** A text field containing the text "Duplicate Bill Request".
- Body:** A large text area for the email body.
- Buttons:** At the bottom, there are two buttons: a red "CANCEL" button and a green "SEND EMAIL" button.

e. Explain the process of a disaster recovery plan.

Level One's data centers maintain proactive measures to safeguard your customer data from security breaches. Level One securely receives client files for processing 24/7/365 days a year and automates the transfer, processing and confirmation of production files, incorporating quality checkpoints at every phase of production with complete N+1 redundancy with disaster recovery. Level One has eight state of the art production sites across the continental United States as shown in Figure 7. and are networked to allow for streamlined business continuity and activity level loading across the platform. We currently have the open capacity to add at least 7,500,000 images weekly and 31,500,000 images monthly without any additional investment.

**Figure 7. Level One's Production Network**



### **3. TAB C – Product Appearance & Quality**

- a. Provide samples of current clients mailing statements.
- b. Provide examples of image quality.
- c. Provide options for customization of statements.

Level One provides three sample bills to showcase our quality and options for customization attached in this Tab C.





## City of Galveston

Water Department - Customer Service Division  
P.O. Box 779 Galveston, TX 77553

Billing Date

5/14/2021

Account Number

111111

Page 1 of 2

## Billing Statement for Sample Account

Service Location: 1111 AVE M  
Location No.: 11111

### My Account Summary

Due on 6/14/2021					If Paid Before Due Date
PRIOR BALANCE	-	PAYMENTS	=	BALANCE FORWARD	+ NEW CHARGES = TOTAL BALANCE*
\$70.77		\$70.77		\$0.00	\$70.77 = \$73.77

### Charges Summary

Basic Services	\$70.77
Other Charges	\$0.00
<b>Total Balance</b>	<b>\$73.77</b>

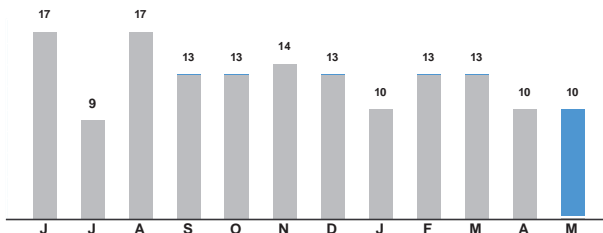
\* Voluntary \$3.00 EMS Contribution may be deducted from the total amount.

### My Usage History



#### Water

Average cubic feet used per day



**300**  
Total cubic feet  
billed this period

### Message Board

How to report a street light outage to CenterPoint Energy:

1. If a street light is out in your area, please visit <http://gis.centerpointenergy.com/sloreporting> or call 713-207-2222 or 800-332-7143

You will be asked to provide:

1. A pole number for the non-functioning lights you want to report (a six-digit number found on the pole)
2. Contact information (in case more information is needed to locate a streetlight)
3. An e-mail address (if you want feedback regarding your repair request)
4. The number of streetlights you would like to report

The City of Galveston does not manage or maintain power services, but we communicate with CenterPoint Energy regarding widespread outages or when there are other issues such as street light outages.



#### City of Galveston

Water Department - Customer Service Division  
P.O. Box 779 Galveston, TX 77553

RETURN THIS PORTION WITH YOUR PAYMENT

**MAKE CHECK PAYABLE TO:  
CITY OF GALVESTON**

Please allow 5 business days before due date to ensure proper credit

32000001



Sample address

Account Number

111111

Location Number

11111

**DUE DATE**

**6/14/2021**

**TOTAL BALANCE\***

**\$73.77**

**After Due  
Date Pay**

**\$80.67**

\* Voluntary \$3.00 EMS Contribution may be deducted from the total amount.

**Auto Payment  
DO NOT PAY**



00008400000070773710900000007377061421

## My Billing Details

Prior Balance from last bill \$70.77  
 Payment(s) as of 5/6/2021 - Thank You! -\$70.77

<b>Total Other Charges</b>	<b>\$0.00</b>
----------------------------	---------------

Water	\$16.12
Sewer	\$23.36
Municipal Drainage	\$7.00
Garbage	\$20.48
Recycling Charge	\$1.96
* Sales Tax	\$1.85

<b>Total New Charges</b>	<b>\$70.77</b>
--------------------------	----------------

<b>Total Balance*</b>	<b>\$73.77</b>
-----------------------	----------------

\* Voluntary \$3.00 EMS Contribution may be deducted from the total amount.

## My Meter Readings

**Meter Number:** 11111111

Meter Size: 5/8 Inch

Current: 324 Act. 4/23/2021

Previous: 321 3/24/2021

Actual Usage: 300 Cubic Feet

Days of Service: 30



## How to Contact Us

**Need Assistance or have questions about your bill?**

### Customer Service Hours

Monday – Friday 8:00 a.m. – 5:00 p.m.

**(409) 797-3550 (409) 242-2148 (Fax)**

### Pay On-Line

24 hours a day / 7 days a week

**<https://galvestontx.epayub.com>**

**Pay By Phone - (409) 797-3550**

### Pay By Drive Thru

Monday – Friday 7:00 a.m. – 6:00 p.m.

**823 25th Street**

### Enroll in Automatic Bill Payment

Rest easy knowing that your bill is always paid on time. Automatic bill payment is easy and allows us to draft your checking account or debit / credit card each month.

### Enroll on website or call customer service

[www.galvestontx.gov](http://www.galvestontx.gov) or call (409) 797-3550.

### Moving or Discontinuing Your Services?

To ensure your services are stopped or changed, please visit [www.galvestontx.gov](http://www.galvestontx.gov) or call Customer Service at (409) 797-3550

### Please Help Us Serve You Better

- ✓ DO NOT SEND CASH
- ✓ Sign your check or money order
- ✓ Write your Account/Location number on your check or money order
- ✓ Enclose your stub with your check
- ✓ No Staples, No Paper Clips

## Convenient Ways to Pay



**Online**

is available 24/7  
<https://galvestontx.epayub.com>



Scan now with  
 your smart phone



**Phone**

with a credit/debit card  
 or ACH transaction  
 (409) 797-3550

8:00 a.m. - 5:00 p.m.  
 Weekdays



**Drive Thru**

City Hall  
 823 Rosenberg  
 Galveston, TX



**Mail**

City of Galveston  
 P.O. Box 779  
 Galveston, TX 77553



**Thank you for being a valued customer.**

It is our pleasure to be of service to you and the community.



# City of Houston

## Utility Bill

713.371.1400  
www.houstonwater.org

**take  
your  
BEST  
SHOT!**

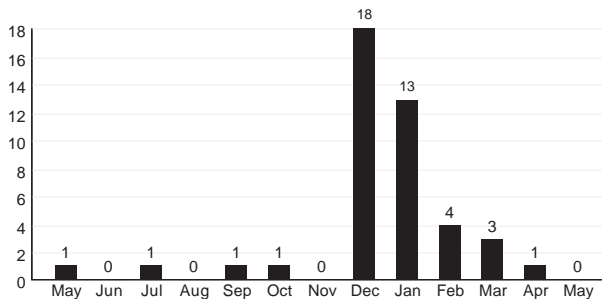
**Houston Health Department COVID-19 vaccination sites** are available with or without appointments. Find a nearby site at [HoustonEmergency.org](http://HoustonEmergency.org) or by calling 832-393-4220 or 832-393-4301.

Customer Name: Sample Account  
Account Number: 1111-2222-3333  
Service Address: 1111 FANNIN  
Bill Date: 5/14/2021  
Total Amount Due: \$29.39

### Billing Period

Previous Read Date 4/11/2021  
Current Read Date 5/14/2021  
Previous Meter Reading 584  
Current Meter Reading 584

### Water Meter Consumption (per 1,000 gal.)



### Summary of Charges

Previous Balance \$40.62  
Payment - Thank You \$40.62  
Adjustments \$0.00  
Current Charges \$29.39  
**Total Amount Due \$29.39**

To avoid late fees or service interruption, please pay Total Amount Due by 6/4/2021.

- \* If you have a question about your bill or want to make a payment: 713-371-1400
- \* City Leaks and other City Services: 713-837-0311
- \* Thank you for your pledge or contribution to the W.A.T.E.R. fund. Check the "\$1 Gift" box below to include an extra dollar with your payment, or visit [www.houstonwater.org](http://www.houstonwater.org) to make a contribution.

**Account Number: 1111-2222-3333**

Return this portion with payment. Write account number on all checks.  
Payable to: CITY OF HOUSTON

\$1 Gift to W.A.T.E.R. Fund ☐

<b>TOTAL AMOUNT DUE:</b>	<b>\$29.39</b>
Amount Paid:	
Due Date:	6/4/2021
Amount After 6/4/2021	\$32.33

HOU051560000736



Sample Address



CITY OF HOUSTON  
PO BOX 1560  
HOUSTON TX 77251-1560

1560122022001129000000293900000032335



# City of Houston

## Utility Bill

713.371.1400  
[www.houstonwater.org](http://www.houstonwater.org)

### Detailed Meter Usage

Meter Type	Meter Number	Meter Size (Inches)	Previous Reading	Current Reading	Gallons in Thousands	Read Date
WATER COMM	1111111-BA-1.000	1	584	584	0	5/14/2021

Payments Received	Adjustments	Current Charges
5/8/2021 \$40.62		Commercial Base Sewer Charge \$11.17 Commercial Base Water Charge \$7.50 Drainage Charge \$10.72

If you feel that you have been incorrectly billed for water or sewer services, you have the right to dispute the charges. You must file within 90 days from the date of the first disputed bill to request an administrative review or hearing. Please visit our website at [www.houstonwater.org](http://www.houstonwater.org) for a complete list of non-disputable items. If you are waiting for a decision on a bill adjustment, you must continue to pay your current bill(s) while awaiting resolution of your adjustment to avoid interruption of your service, additional penalties, and/or late fees. **In the event service is disconnected for non-payment, service may not be reinstated for one to two business days after the account has been paid in full or satisfactory arrangements have been made.**

If your services are in danger of termination because you cannot pay, you may be eligible for assistance from the W.A.T.E.R. Fund. Proof of income is required and assistance is subject to availability of funds.

Your drainage charge is calculated on the impervious surface area of your property less a 1,000 square foot adjustment.



## City of Pasadena

### Water Department

1202 Southmore Avenue  
Pasadena, TX 77502

Billing Date  
**05/14/2021**

Account Number  
**1234567-27**

Page 1 of 2

## Utility Billing Statement for Sample

Service Location: 1111 ROBINHOOD ST

### My Account Summary

Due on 06/01/2021

OPENING BALANCE	-	PAYMENTS	=	BALANCE FORWARD	+	NEW CHARGES	=	TOTAL AMOUNT DUE
\$220.69		\$226.65 CR		\$0.00		\$74.78		\$74.78

### My Billing Details

Prior Balance from last bill	\$220.69
Late Charge	\$5.96
Payment(s) as of 05/14/2021	\$226.65 CR
<b>Balance Forward from last bill</b>	<b>\$0.00</b>

### Current Charges

WATER-RESIDENTIAL	\$24.88
SEWER - RESIDENTIAL	\$22.90
GARBAGE - REGULAR	\$27.00
<b>Total Current Charges</b>	<b>\$74.78</b>

**Total Amount Due \$74.78**

The DISCONNECT DATE for your Current Charges is 06/09/2021

### My Meter Readings

Water - Meter ID #: 111111111-1

Current: 349620 05/03  
 Previous: 343400 03/31  
 Usage: 6220

### Message Board

Office Number: (713) 475-5566

Email address: wbcs@pasadenatx.gov

Office Hours: MON, TUE & THUR - 7:30 to 5  
WED Only - 7:30 to 6 FRI - 7:30 to 1

\* Sign up for paperless billing (eBilling) at  
<https://schedulepayment.com/pd>.

\* Online payments can be made at  
<https://ipn.paymentus.com/cp/ppdf>.

\* 24-hour automated phone payment system  
(IVR) by calling (888) 647-0085

For any leaks or non-billing concerns, please call  
the Mayor's Action Line at (713) 475-5555. The  
office will be closed Monday, May 31 in  
observance of Memorial Day.

RETURN THIS PORTION WITH YOUR PAYMENT

MAKE CHECK PAYABLE TO:  
CITY OF PASADENA



City of Pasadena

Water Department  
P.O. Box 1337 Pasadena, TX 77501

Account Number  
**1234567-27**

Remittance Copy  
**1111111111**

DUE DATE	AMOUNT DUE
<b>06/01/2021</b>	<b>\$74.78</b>

After Due Date	AMOUNT DUE
	<b>\$82.26</b>

Amount Enclosed \$ .....

Please allow 5 business days before  
due date to ensure proper credit

PSB051376000239



Sample address



## Water Billing Department Information Sheet

### Payment "Due Date"

The Water Billing Department has four (4) billing cycles each with a different "Due Date". Billing cycles are based on the property's geographical location and cannot be modified. Customers have 18 days to pay the balance due without penalty (usually a Monday). Payments not received by the "Due Date" are subject to a 10% late fee.

**IMPORTANT:** Failure to receive bill does not excuse non-payment nor does it waive the late charges.

Each cycle is billed on a Thursday. Below are estimated billing dates:

- Cycle 1 – 1st to 7th of the month (Account# starts with 1)
- Cycle 2 – 8th to 14th of the month (Account# starts with 2)
- Cycle 3 – 15th to 21st of the month (Account# starts with 3)
- Cycle 4 – 22nd to 28th of the month (Account# starts with 4)

If you have a "Balance Forward from last bill", you are subject to disconnection at any time. Bills are issued and due monthly.

Please do not wait until the "Due Date" to question the validity of your bill as late fees and disconnect procedures will continue automatically if your bill is delinquent.

For a water or sewer emergency, please call (713) 475-5555.

**Note:** Disconnection for non-payment does not constitute an emergency.

**Account records:** Please keep your account info up-to-date with our office. Notify us of new phone numbers, email addresses, name changes and any other account information.



## How to Contact Us

### Need assistance or have questions about your bill?

#### Office Hours

Monday, Tuesday & Thursday 7:30 AM to 5 PM  
Wednesday \* 7:30 AM to 6 PM \*  
Friday 7:30 AM to 1 PM

**Phone:** (713) 475-5566 **Fax:** (713) 475-4945

**Email:** wbc@pasadenatx.gov

#### Office Address:

1202 Southmore Ave, Pasadena, TX 77502

#### Mailing Address:

PO Box 1337, Pasadena, TX 77501

#### Web Address:

<https://www.pasadenatx.gov/379/Water-Billing>

#### Enroll in Automatic Bill Payment

Rest easy knowing that your bill is always paid on time. Automatic draft is easy and allows us to draft your checking account each month.

Download a bank authorization form at <https://www.pasadenatx.gov/389/Bill-Payments> or call to request one at (713) 475-5566.

#### Moving or Discontinuing Your Services?

To ensure your services are stopped or transferred, please submit an online form at <https://www.pasadenatx.gov/382/Establish-Discontinue-Service>

## Convenient Ways to Pay



### Phone

with a credit  
or debit card at  
(713) 475-5566



### In Person

City Hall Annex  
1202 Southmore Ave  
Pasadena, TX  
Night Deposit box  
located in drive through lane



### Mail

City of Pasadena Water Dept.  
P.O. Box 1337  
Pasadena, TX 77501



### AutoDraft

Automatic draft from a  
checking or savings  
account



**Thank you for being a valued customer.**

It is our pleasure to be of service to you and the community.

## 4. TAB D – Pricing

### a. Proposal Cost Sheet – Attachment A



RFP #21-027  
Utility Billing Monthly Printing and Mailing

#### Proposal Cost Sheet

DUE DATE: Tuesday, May 18, 2021 by 2:00 p.m.

<u>Description</u>	<u>Rate</u>	<u>Estimated Quantity</u>	<u>Extended Price</u>
<b>Programming Services</b> Initial Set Up or Formatting Fee	\$ 125.00	40.0	\$ Initial setup waived
<b>Graphic Design Services</b> Design of Utility Billing	\$ 125.00	1.0	\$ Included in initial setup
<b>Regular Billing Statements</b>	\$ 0.049	1,080,000	\$ 52,920.00
<b>Delinquent Statements</b>	\$ 0.049	180,000	\$ 8,820.00
<b>Inserts</b> 8.5 x 11 full color duplex printed.	\$ 0.035	1,080,000	\$ 37,800.00
<b>#10 Envelopes</b>	\$ 0.01925	2,160,000	\$ 41,580.00
<b>Postage</b> 5-digit full service rate for all records that qualify	\$ 0.395	1,260,000	\$ 497,700.00
<b>Statement Changes</b> Post go-live programming rate. All requests would be quoted based on requirements.	\$ 125.00	TBD	TBD
<b>Total Proposal Cost</b>			\$ 638,820.00

Unit prices listed above are good for one hundred twenty (120) calendar days after receipt of proposal.

## 5. TAB G – Forms (Attachment A)

a) Completed Bidder Certification and Addenda Acknowledge Form (initials are required to acknowledge any addendums or amendments).

b) Completed City of League City Texas Public Information Act

c) If required, provide a completed copy of the Conflict-of-Interest Questionnaire (Form CIQ).

Level One provides the following required forms attached in this Tab.

- Proposer Cover Sheet
- Proposer Certification and Addenda Acknowledge Form
- Texas Public Information Act
- CIQ





**Proposal Cover Sheet**

**Due Date: Tuesday, May 18, 2021 by 2:00 p.m.**

Level One LLC a Doxim Company

Name of Firm/Company

Harry Vasquez

Customer Success Manager

Agent's Name (Please Print)

Agent's Title

53 General Warren Blvd.

Malvern

PA

19355-3919

Mailing Address

City

State

Zip

713-320-9956

harry.vasquez@GoLevelOne.com

Telephone Number

Email Address

A handwritten signature in blue ink, appearing to read "John P. Boland", is written over a horizontal line.

May 17, 2021

Authorized Signature

Date

**Proposal Submission Checklist**

Proposal submission package shall consist of the following:

- ☒ Proposal Cover Sheet
- ☒ Proposal (If hard copy submitted: one marked original, one marked copy and a flash drive)
- ☒ Cost Proposal Sheet
- ☒ Bidder Certification and Addenda Acknowledgement, Addendum(s) if applicable
- ☒ Public Information Act Form
- ☒ Conflict of Interest Questionnaire (if required)




**PROPOSER CERTIFICATION AND ADDENDA ACKNOWLEDGEMENT**

By signature affixed, the proposer certifies that neither the proposer nor the firm, corporation, partnership, or institution represented by the proposer, or anyone acting for such firm, corporation, or institution has violated the anti-trust laws of this State, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the RFP made to any competitor or any other person engaged in such fine of business.

Proposer has examined the specifications and has fully informed themselves as to all terms and conditions. Any discrepancies or omissions from the specifications or other documents have been clarified with City representatives and noted on the proposal submitted.

Proposer guarantees product offered will meet or exceed specifications identified in this RFP.

Proposer must initial next to each addendum received to verify receipt:

Addendum #1  Addendum #2 \_\_\_\_\_ Addendum #3 \_\_\_\_\_

Addendum #4 \_\_\_\_\_ Addendum #5 \_\_\_\_\_ Addendum #6 \_\_\_\_\_



## Texas Public Information Act

### Steps to Assert that Information is Confidential or Proprietary

All proposals, data, and information submitted to the City of League City are subject to release under the Texas Public Information Act ("Act") unless exempt from release under the Act. You are not encouraged to submit data and/or information that you consider to be confidential or proprietary unless it is absolutely required to understand and evaluate your submission.

**On each page where confidential or proprietary information appears,** you must label the confidential or proprietary information. Do not label every page of your submission as confidential as there are pages (such as the certification forms and bid sheet with pricing) that are not confidential. It is recommended that each page that contains either confidential or proprietary information be printed on colored paper (such as yellow or pink paper). At a minimum, the pages where the confidential information appears should be labeled and the information you consider confidential or proprietary clearly marked.

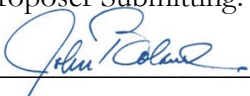
**Failure to label the actual pages on which information considered confidential appears will be considered as a waiver of confidential or proprietary rights in the information.**

In the event a request for public information is filed with the City which involves your submission, you will be notified by the City of the request so that you have an opportunity to present your reasons for claims of confidentiality to the Texas Attorney General.

**In signing this form, I acknowledge that I have read the above and further state (Please check one):**

- ☒ The proposal/bid submitted to the City **contains NO confidential information** and may be released to the public if required under the Texas Public Information Act.
- ☐ The proposal/bid submitted **contains confidential information** which is labeled and which may be found on the following pages: \_\_\_\_\_ and any information contained on page number not listed above may be released to the public if required under the Texas Public Information Act.

Vendor/Proposer Submitting: Level One LLC a Doxim Company

Signature:  Date: May 17, 2021

Print Name: John P. Boland Print Title: General Manager

# CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

## OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

Level One LLC a Doxim Company

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

N/A

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes

☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?


☐ Yes

☐ No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

Level One does not have any conflicts of interest.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7   
Signature of vendor doing business with the governmental entity

May 17, 2021

Date



**Proposal Cost Sheet**

**DUE DATE: Tuesday, May 18, 2021 by 2:00 p.m.**

<b><u>Description</u></b>	<b><u>Rate</u></b>	<b><u>Estimated Quantity</u></b>	<b><u>Extended Price</u></b>
<b>Programming Services</b> Initial Set Up or Formatting Fee	\$ 125.00	1.0	Initial setup of 40 hours has been waived.
<b>Graphic Design Services</b> Design of Utility Billing	\$ 125.00	1.0	Included in initial setup
<b>Regular Billing Statements</b>	\$ 0.049	1,080,000	\$ 52,920.00
<b>Delinquent Statements</b>	\$ 0.049	180,000	\$ 8,820.00
<b>Inserts</b>	\$ 0.035	1,080,000	\$ 37,800.00
<b>#10 Envelopes</b>	\$ 0.01925	2,160,000	\$ 41,580.00
<b>#9 Envelopes</b>	\$ 0.01525	1,080,000	\$ 16,200.00
<b>Postage</b>	\$ 0.395	1,260,000	\$ 497,700.00
<b>Statement Changes</b> Post go-live programming rate. All requests would be quoted based on requirements.	\$ 125.00	TBD	TBD
<b>Total Proposal Cost</b>			\$ 655,020.00

Unit prices listed above are good for one hundred twenty (120) calendar days after receipt of proposal.