



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 CPR10000

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 KRISTA FERRELL
 304-558-2596

VENDOR

RFQ COPY
 TYPE NAME/ADDRESS HERE

SHIP TO

CONSOLIDATED PUBLIC RETIREMENT BOARD
 BUILDING 5, ROOM 1000
 1900 KANAWHA BOULEVARD, EAST
 CHARLESTON, WV
 25305-0720 558-3570

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
05/04/2009				

BID OPENING DATE: 05/12/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	YR	966-52	ADDENDUM NO. 1 THIS ADDENDUM IS ISSUED TO: 1.) ANSWER ALL TECHNICAL QUESTIONS SUBMITTED PRIOR TO THE DEADLINE FOR TECHNICAL QUESTIONS AND 2.) CHANGE THE BID OPENING DATE: BID OPENING DATE IS CHANGED TO: 05/12/2009 BID OPENING TIME REMAINS: 1:30 PM ***** ** END ADDENDUM NO. 1 *****		
				PUBLICATIONS (30 PAGES OR MORE), PRINTING OF (FOUR C		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE	TELEPHONE	DATE
TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

**GENERAL TERMS & CONDITIONS
REQUEST FOR QUOTATION (RFQ) AND REQUEST FOR PROPOSAL (RFP)**

1. Awards will be made in the best interest of the State of West Virginia.
2. The State may accept or reject in part, or in whole, any bid.
3. All quotations are governed by the *West Virginia Code* and the *Legislative Rules* of the Purchasing Division.
4. Prior to any award, the apparent successful vendor must be properly registered with the Purchasing Division and have paid the required \$125 fee.
5. All services performed or goods delivered under State Purchase Order/Contracts are to be continued for the term of the Purchase Order/Contracts, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
6. Payment may only be made after the delivery and acceptance of goods or services.
7. Interest may be paid for late payment in accordance with the *West Virginia Code*.
8. Vendor preference will be granted upon written request in accordance with the *West Virginia Code*.
9. The State of West Virginia is exempt from federal and state taxes and will not pay or reimburse such taxes.
10. The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
11. The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
12. Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, this Contract may be deemed null and void, and terminated without further order.
14. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
15. **WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free work place policy in compliance with the West Virginia and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."

INSTRUCTIONS TO BIDDERS

1. Use the quotation forms provided by the Purchasing Division.
2. **SPECIFICATIONS:** Items offered must be in compliance with the specifications. Any deviation from the specifications must be clearly indicated by the bidder. Alternates offered by the bidder as **EQUAL** to the specifications must be clearly defined. A bidder offering an alternate should attach complete specifications and literature to the bid. The Purchasing Division may waive minor deviations to specifications.
3. Complete all sections of the quotation form.
4. Unit prices shall prevail in case of discrepancy.
5. All quotations are considered F.O.B. destination unless alternate shipping terms are clearly identified in the quotation.
6. **BID SUBMISSION:** All quotations must be delivered by the bidder to the office listed below prior to the date and time of the bid opening. Failure of the bidder to deliver the quotations on time will result in bid disqualifications: Department of Administration, Purchasing Division, 2019 Washington Street East, P.O. Box 50130, Charleston, WV 25305-0130

Q: Regarding the above RFQ, what are the envelope specifications (size, stock, window, printing, color)?

A: 2-window with "IMPORTANT TAX DOCUMENT ENCLOSED"
White 9 7/16" x 3 7/8" envelope size with confidential tint

Q: What are the paper specifications (brand, weight, color)?

A: Color white,
Brand ?,
Weight 24 pound

Q: Does the 1099R insert into the envelope flat or is it folded?

A: The 1099 is folded.

Q: Is the bid opening date 05/05/2009 or 05/08/2009?

Q: If there are incomplete addresses, the complete address must be added by the vendor, using USPS approved method. What do you mean by "incomplete" addresses? Provide example.

A: You can ignore this.

Q: In lieu of 1099 Express, would searchable PDF files on CD be acceptable?

A: No

Q: In lieu of 1099 Express, will the client be willing to utilize Adobe Reader for PDF printing purposes?

A: No

Q: Is there a paper preference for 8.5" x 11" insert printing?

A: 20 pounds or better. Keep in mind that one of the inserts (every other year) is a full-color Calendar provided by the WV State Auditor's Office and we have no control over that paper weight. We mail this calendar to your location

Q: Is the input file 1099-R recipient information in a particular order? Last Name, Zip Code, SSN?

A: No, you would sort them by zip I assume. Our preferred layout is attached.

Q: Explain what is meant by the CPRB PDF insert and approval process?

A: We send it to you in PDF form, you print a sample, fax the sample to (304) 558-5455, we approve to ensure legibility and completeness.

Q: As multiple inserts may be necessary, do 1099-R recipients receive all inserts? If a single

insert, do all 1099-R recipients receive the insert?

A: The instruction sheet (PDF) goes to all 1099-R recipients. If there is an additional insert that does not go to all recipients we will divide the file.

Q: Can we receive a sample "input" file with format explanation?

A: See attached file layout.

Q: If the successful vendor is required to provide a CD with a PDF image of each and every mailed 1099R tax form, why do you need software to read and /or print out additional copies? Are you doing something else with the software?

A: The software is also used to edit 1099R's for corrections and to print corrected copies.

Q: You make mention of 1099 Express software in the bid, was WV CPRB licensed to use 1099 Express or some other software in the past? If so, what software and what year(s)?

A: 1099 Express 2006, 2007, 2008

Q: Concerning the insert(s), are they generic or customized to each individual recipient? If they are customized, how much customized information is each insert? Did you have inserts in any of the last three years?

A: Yes, PDF instructions are every year.

Q: You mention a calendar insert needed every other year. What the specs for the calendar? A. Size? B. What material is it printed on? C. Is 2009 a "calendar year"?

A: The WV State Auditor's Office prints the full-color calendar and we mail it to you. They are every other year (2006, 2008, 2010...). There is no calendar in 2009.

Q: What size envelope was used in the past? Was the envelope a no window, 1 window, or two window envelope? Did you have a confidential inside tint?

A: 2-window with "IMPORTANT TAX DOCUMENT ENCLOSED". Yes, to confidential tint.

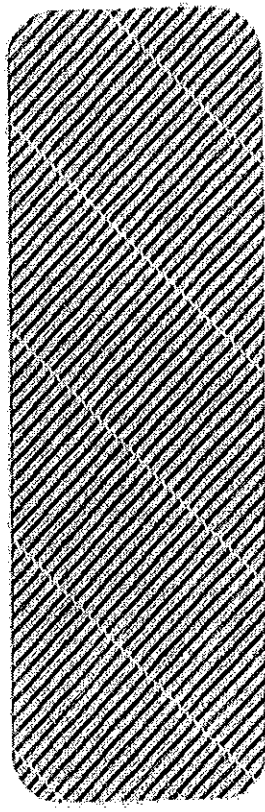
Q: Do you have a complete sample?

A: We currently do not have any samples but we have attached a copy of the envelope previously used, along with copies of all documents that are inserted.

PRESORTED
FIRST CLASS MAIL
U.S. POSTAGE PAID
PITTSBURGH, PA
PERMIT NO. 4540

**Important Tax Return
Document Enclosed**

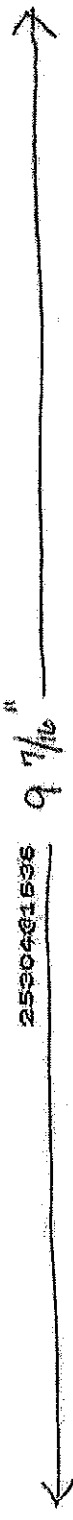
517



2590401596

9 7/16"

4 1/2"



PAYER'S name, street address, city, state, and ZIP code
W VA. PUBLIC EMPLOYEES RET SYS
4101 MACCORKLE AVENUE SE
CHARLESTON, WV 25304

1 Gross distribution \$ 1985.88
2a Taxable amount \$ 1985.88
2b Taxable amount not determined
3 Capital gain (incl. in 2a)

OMB No. 1545-0119
2008
Total distribution
4 Federal tax withheld

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs Insurance Contracts, etc.
Form **1099-R Copy B**

PAYER'S Federal Identification No. 55-6011167
RECIPIENT'S Identification No. 000-00-0000

5 Employee contributions or insurance premiums

6 Net unrealized appreciation in employer's securities

Report this income on your Federal tax return. If this form shows Federal income tax withheld in box 4 attach this copy to your return

RECIPIENT'S Name and Address

JOHN DOE
123 HOME STREET
ANYWHERE, WV 25304-1636

7 Distribution code 7
IRA/SEP/SIMPLE

8 Other

9a Your percentage of total distribution

9b Total employee contributions

10 State tax withheld

11 State/Payer's state no.

12 State distribution

Account number (see instructions) 236328338920080001P1
16 Year of Roth cont.

13 Local tax withheld

14 Name of locality

15 Local distribution

Form **1099-R** This information is being furnished to the Internal Revenue Service.

PAYER'S name, street address, city, state, and ZIP code
W VA. PUBLIC EMPLOYEES RET SYS
4101 MACCORKLE AVENUE SE
CHARLESTON, WV 25304

1 Gross distribution \$ 1985.88
2a Taxable amount \$ 1985.88
2b Taxable amount not determined
3 Capital gain (incl. in 2a)

OMB No. 1545-0119
2008
Total distribution
4 Federal tax withheld

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs Insurance Contracts, etc.
Form **1099-R Copy C**

PAYER'S Federal Identification No. 55-6011167
RECIPIENT'S Identification No. 000-00-0000

5 Employee contributions or insurance premiums

6 Net unrealized appreciation in employer's securities

For Recipient's Records

RECIPIENT'S Name and Address

JOHN DOE
123 HOME STREET
ANYWHERE, WV 25304-1636

7 Distribution code 7
IRA/SEP/SIMPLE

8 Other

9a Your percentage of total distribution

9b Total employee contributions

10 State tax withheld

11 State/Payer's state no.

12 State distribution

Account number (see instructions) 236328338920080001P1
16 Year of Roth cont.

13 Local tax withheld

14 Name of locality

15 Local distribution

Form **1099-R** This information is being furnished to the Internal Revenue Service.

PAYER'S name, street address, city, state, and ZIP code
W VA. PUBLIC EMPLOYEES RET SYS
4101 MACCORKLE AVENUE SE
CHARLESTON, WV 25304

1 Gross distribution \$ 1985.88
2a Taxable amount \$ 1985.88
2b Taxable amount not determined
3 Capital gain (incl. in 2a)

OMB No. 1545-0119
2008
Total distribution
4 Federal tax withheld

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs Insurance Contracts, etc.
Form **1099-R Copy 2**

PAYER'S Federal Identification No. 55-6011167
RECIPIENT'S Identification No. 000-00-0000

5 Employee contributions or insurance premiums

6 Net unrealized appreciation in employer's securities

File this copy with your state, city, or local income tax return, when required

RECIPIENT'S Name and Address

JOHN DOE
123 HOME STREET
ANYWHERE, WV 25304-1636

7 Distribution code 7
IRA/SEP/SIMPLE

8 Other

9a Your percentage of total distribution

9b Total employee contributions

10 State tax withheld

11 State/Payer's state no.

12 State distribution

Account number (see instructions) 236328338920080001P1
16 Year of Roth cont.

13 Local tax withheld

14 Name of locality

15 Local distribution

Form **1099-R** This information is being furnished to the Internal Revenue Service.

MEMORANDUM

TO: State of West Virginia 1099-R Recipient

DATE: January 2009

RE: Explanation of 2008 Form 1099-R

To assist you in understanding your 2008 Form 1099-R, the following information is provided:

Box 1 - Gross distribution - This is the total gross annuity, loan offset or lump-sum distribution you received in 2008. If you retired in 2008 from the Teachers' Retirement or the Deputy Sheriff Retirement System and took a loan offset, you will receive two (2) 1099-R forms.

Box 2a - Taxable amount - This is the total amount of your annuity or lump-sum distribution in 2008 that may be subject to income tax. If you are required to complete a 2008 income tax return, please report the amount in this box.

Box 4 - Federal income tax withheld - This is the total amount of federal income tax deducted from your annuity or lump-sum distribution in 2008. Include this amount on your federal income tax return as tax withheld, and if Box 4 shows an amount other than zero, attach Copy B to your return.

Box 5 - Employee contributions or insurance premiums - The figure reported in this box, if any, is the total amount of your annuity or lump-sum distribution in 2008 that is not taxable. This figure is for IRS purposes only and is not a deduction from your annuity. **This is not a deduction for insurance premiums.**

Box 7 - Distribution code - If you are age 59 ½ or less, and your distribution code is a "2" in Box 7, you may need to file Form 5329. *Questions regarding your tax preparation should be directed to the IRS or your tax preparer.*

Box 9b - Total employee contributions - This box applies to retirees only. There is only an amount reported in this box the first year of your retirement. This amount represents the total nontaxable contributions, if any, prior to July 1, 1986 and is for IRS purposes only. This is not a deduction from your retirement annuity.

Box 10 - State tax withheld - This is the total amount of West Virginia state income tax deducted from your annuity or lump-sum distribution in 2008. Deductions for state income tax are for the State of West Virginia only.

For an explanation of information reported in all other boxes, see the instructions on the back of your 1099-R form.

*****NOTICE TO RETIREES ONLY*****

TO AVOID DELAY IN RECEIVING YOUR ANNUAL 1099R, PLEASE NOTIFY OUR OFFICE OF ANY ADDRESS CHANGES.

Federal Tax Law requires that we notify all retirees/beneficiaries annually of their option to have federal tax withheld from their pension check.

- A. You have the right to elect not to have withholding apply.
- B. You have the right to revoke a prior election not to have withholding apply.
- C. You have the right to adjust the allowance claimed on your current withholding certificate.

***** IMPORTANT: YOU DO NOT NEED TO REQUEST A WITHHOLDING CERTIFICATE UNLESS YOU WISH TO CHANGE YOUR WITHHOLDING STATUS.** Forms may be obtained by writing to our office or by visiting our web-site at www.wvretirement.com and clicking on the "Retirees" link.

Anne Werum Lambright, Executive Director
 Consolidated Public Retirement Board
 4101 MacCorkle Avenue SE
 Charleston, WV 25304
 www.wvretirement.com



Glen B. Gainer III, State Auditor
 West Virginia State Auditor's Office
 Electronic Payments Division
 Building 1, Suite W-125
 www.wvsao.gov

2010 DIRECT DEPOSIT CALENDAR FOR RETIREES

JANUARY							FEBRUARY							MARCH						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2	1	2	3	4	5	6	1	2	3	4	5	6		
3	4	5	6	7	8	9	7	8	9	10	11	12	13	7	8	9	10	11	12	13
10	11	12	13	14	15	16	14	15	16	17	18	19	20	14	15	16	17	18	19	20
17	18	19	20	21	22	23	21	22	23	24	25	26	27	21	22	23	24	25	26	27
24	25	26	27	28	29	30	28							28	29	30	31			
31																				
APRIL							MAY							JUNE						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3						1		1	2	3	4	5		
4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12
11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19
18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26
25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30			
							30	31												
JULY							AUGUST							SEPTEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30		
OCTOBER							NOVEMBER							DECEMBER						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2		1	2	3	4	5	6				1	2	3	4	
3	4	5	6	7	8	9	7	8	9	10	11	12	13	5	6	7	8	9	10	11
10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18
17	18	19	20	21	22	23	21	22	23	24	25	26	27	19	20	21	22	23	24	25
24	25	26	27	28	29	30	28	29	30					26	27	28	29	30	31	
31																				



Date Deposit funds will be available in your account
 (Also indicates the date paper checks will be mailed)

If the Amount of your Direct Deposit is Wrong:
 Contact: Retirement Benefits
 Consolidated Public Retirement Board
 1.800.654.4406

For Problems With Your Bank Account:
 Contact: Electronic Payments Division
 West Virginia State Auditor's Office
 1.800.500.4079