

**MASTER AGREEMENT #070125****CATEGORY: Mailing and Postage Equipment and Technology****SUPPLIER: Pitney Bowes Inc.**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Pitney Bowes Inc., a Delaware corporation located at 3001 Summer Street, Stamford, CT 06926 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

**Article 1:
General Terms**

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on July 30, 2029, unless it is cancelled or extended as defined in this Agreement.
- a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
- b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in (Solicitation #070125) to Participating Entities. In-scope solutions include:
- a) Solutions for receiving, handling, preparation, packaging, tracking, and shipping of mail and parcels, including equipment, technology, hardware, supplies, and accessories;
- b) Purpose-built mailroom furniture, furnishings, security or storage systems, and equipment with related supplies and accessories;
- c) Postage systems of all types and postal cost-optimization solutions; and,
- d) Solutions related to Sections 7) a) – c) above, including installation, maintenance, repair, training, mailing/postage-related software, integration, support, and customization.
- 8) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 10) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.
- 11) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcewell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.

13) Supplier Representations:

- i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
- ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
- iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.

14) Bankruptcy Notices. Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the term of this Agreement.

15) Debarment and Suspension. Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time during the term of this Agreement.

16) Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R. § 200). Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.

- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of "federally assisted construction contract" in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 C.F.R. § 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." The equal opportunity clause is incorporated herein by reference.

ii) **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.

iii) **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcwell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier

certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

v) **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Agreement it will comply with applicable requirements as referenced above.

vi) **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

vii) **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

viii) **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

- xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.
- xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.
- xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.
- xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.
- xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.
- xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.
- xviii) **U.S. EXECUTIVE ORDER 13224.** The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.

xix) **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.** To the extent applicable, Supplier certifies that during the term of this Agreement it will comply with applicable requirements of 2 C.F.R. § 200.216.

xx) **DOMESTIC PREFERENCES FOR PROCUREMENTS.** To the extent applicable, Supplier certifies that during the term of this Agreement, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

Article 2: Sourcewell and Supplier Obligations

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.
- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
 - Identify the applicable Sourcewell Agreement number;
 - Clearly specify the requested change;
 - Provide sufficient detail to justify the requested change;
 - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
 - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
 - Maintenance and management of this Agreement;
 - Timely response to all Sourcewell and Participating Entity inquiries; and
 - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.

- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.

- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any negligent act or omission, or willful misconduct, in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement to the extent the Included Solution has been used according to its specifications. Neither party will be liable to the other for incidental or consequential damages under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.

19) **Grant of License.**

a) **During the term of this Agreement:**

i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.

ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.

b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.

c) **Use; Quality Control.**

i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.

ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

20) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.

- 21) **Severability.** If any provision of this Agreement is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.
- 22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:
- a) **Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors (vicarious liability only), products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
 - \$1,500,000 each occurrence Bodily Injury and Property Damage
 - \$1,500,000 Personal and Advertising Injury
 - \$2,000,000 aggregate for products liability-completed operations
 - \$2,000,000 general aggregate
 - b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
 - c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.
 - d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

Article 3: Supplier Obligations to Participating Entities

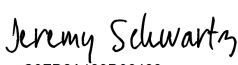
The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.
- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's

070125-PIT

standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.

- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell
Signed by:

C0FD2A139D06489...

By: _____
Jeremy Schwartz
Title: Chief Procurement Officer

Date: 8/7/2025 | 1:18 PM CDT

Pitney Bowes Inc.
DocuSigned by:

894E820D7C7B421...

By: _____
William R Walter
Title: VP State and Local Govt

Date: 8/7/2025 | 10:58 AM PDT

RFP 070125 - Mailing and Postage Equipment

Vendor Details

Company Name: Pitney Bowes Inc.
3001 Summer Street
Address: Stamford, CT 06926
Contact: Bill Walter
Email: bill.walter@pb.com
Phone: 480-206-2984
HST#: 06-0495050

Submission Details

Created On: Tuesday May 20, 2025 06:35:00
Submitted On: Friday June 27, 2025 14:28:58
Submitted By: Bill Walter
Email: bill.walter@pb.com
Transaction #: df44e022-dede-4220-92fb-db0dbae6682e
Submitter's IP Address: 147.243.131.108

Specifications

Table 1: Proposer Identity & Authorized Representatives (Not Scored)

General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond "N/A" if the question does not apply to you (preferably with an explanation).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer's corporate organization affiliation.

Line Item	Question	Response *	
1	Provide the legal name of the Proposer authorized to submit this Proposal.	Pitney Bowes Inc.	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Yes	*
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	Pitney Bowes Global Financial Services LLC	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	47486	*
5	Provide your NAICS code applicable to Solutions proposed.	561210	
6	Proposer Physical Address:	27 Waterview Drive, Shelton, CT, 06484	*
7	Proposer website address (or addresses):	www.pitneybowes.com	*
8	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the "Proposer's Assurance of Compliance" on behalf of the Proposer):	William R Walter, VP State and Local Govt, 602-642-4259, 27 Waterview Dr, Shelton, CT 06484	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	William R Walter, VP State and Local Govt, 602-642-4259, 27 Waterview Dr, Shelton, CT 06484	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Amy Hare, Director, Government Contracts and Compliance, 203-360-2253, amy.hare@pb.com	*

Table 2A: Financial Viability and Marketplace Success (50 Points, applies to Table 2A and 2B)

Line Item	Question	Response *	
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11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	Pitney Bowes Inc. was incorporated in the state of Delaware in 1920. As a US company, we are an industry leader offering innovative products and solutions that enable commerce in the areas of customer information management, customer engagement, shipping and mailing, and global ecommerce. We provide products, services, and support to hundreds of thousands of clients. Approximately 900,000 meters have been installed in the US, spanning all 50 states nationwide. For more than 104 years, Pitney Bowes has crafted innovated technologies to help businesses of all sizes meet their varied shipping and mailing needs. As the market leader, Pitney Bowes has experience providing service to all types of clients. Clients around the world, including 90% of the Fortune 500 companies utilize our products, solutions, and services. Our approach is to understand customer challenges and craft sending technology solutions that are individually designed. For us, getting it right matters. With a steady focus on the future of sending, Pitney Bowes continues to innovate every day. From the first postage meters to today's software and services, we've crafted a range of sending technology solutions that remove complexity and drive meaningful impact for your business. From the simplest postage meter to the most complex enterprise-wide process management solution, we support entities of all makeups and sizes.	*
12	What are your company's expectations in the event of an award?	Pitney Bowes will be honored when selected to continue being of service to Sourcewell members. For many years the partnership between NJPA/Sourcewell and Pitney Bowes has been a strong one to the benefit of the members. We expect this to continue for the four to seven years of this award and relish the opportunity.	*
13	Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.	In 2024, Pitney Bowes Inc. showcased financial stability through transparent reporting, a strong and stable credit rating, prudent debt and cost management, all underscored by active oversight. Their publicly-filed documentation offers robust, data-driven evidence supporting their financial strength. Please refer to PBI Form 10-K of 2024 for further details.	*
14	Tell us your US market share for your proposed Solutions. OR, provide the number of US Education and Government entities you have served over the past three (3) years, along with the total number of states where you have made sales.	Pitney Bowes has been of service to thousands of Education and Government entities in the last 3 years. These clients and members have been located in all 50 states including Alaska and Hawaii. As the predominant leader in the industry we are proud of our ability to service and support all clients regardless of geographic location in the United State of America.	*
15	Tell us your Canadian market share for your proposed Solutions. OR, provide the number of Canadian Education and Government entities you have served over the past three (3) years, along with the total number of provinces where you have made sales.	N/A. Pitney Bowes Inc. is not submitting a proposal for the Canada region as part of this solicitation. This proposal is limited to product offerings and services within the United States only.	*
16	Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	Pitney Bowes Inc. has not engaged in bankruptcy proceeding in the past 7 years.	*
17	How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b). a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned? b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?	Pitney Bowes is best described a "b", a manufacturer or service provider. Our relationship with our sales and service force is that they are employees of PBI.	*

18	If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.	PBI holds several certifications and affiliations that reflect its commitment to quality, security, environmental sustainability, and supplier diversity. Here's an overview: Environmental & Sustainability Certifications ISO 14001 Certification: Pitney Bowes' Danbury, Connecticut facility received ISO 14001 certification for its Environmental Management System (EMS), demonstrating effective management of environmental impact. Climate Leadership Awards: The company has been recognized with the 2020 and 2021 Climate Leadership Awards for Excellence in Greenhouse Gas Management, acknowledging its efforts in reducing emissions and implementing energy-efficient practices. Security & Compliance Certifications ISO 27001: This certification indicates that Pitney Bowes has established an information security management system to protect sensitive data. SOC 2 & SOC 3: These certifications focus on how the company handles data security, availability, processing integrity, confidentiality, and privacy. GDPR Compliance: Pitney Bowes ensures that all applications on its platform are designed to comply with the General Data Protection Regulation. FedRAMP & StateRAMP: These programs help federal and state agencies use cloud services securely, with Pitney Bowes meeting the necessary security standards. VPAT: The company completes a Voluntary Product Accessibility Template to document how its products meet accessibility standards. Industry & Postal Certifications USPS CASS Certification: Pitney Bowes' SmartMailer™ 7 and AddressRight® Pro software solutions have received U.S. Postal Service CASS certification, ensuring address accuracy for mail discounts. TSA Certified Cargo Screening Program: The company is certified by the Transportation Security Administration to participate in a cargo screening program, enhancing the security of international mail and packages. Supplier Diversity & Recognition Supplier Diversity Program: Pitney Bowes is committed to growing its business using diverse suppliers, including minority-owned, women-owned, veteran-owned, LGBTQ+, and small businesses. WBENC America's Top Corporations for Women's Business Enterprises: The company was named among WBENC's 2023 list, recognizing its leadership in corporate supplier diversity programs.
19	Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.	None

20	Describe any relevant industry awards or recognition that your company has received in the past five years.	Over the years, Pitney Bowes Inc. has been recognized for its innovation, operational excellence and commitment to workplace equity and sustainability. Please refer to a few awards that PBI has received. 2025 Inbound Logistics Top 100 Logistics IT Provided 2025 2024 Fortune Statista Americas Most Innovative Companies 2024 2021 J.D. Power 2021 Climate Leadership Awards 2021 Forbes World's Best Employers 2021 Human Rights Campaign Foundation Best Places to Work for LGBTQ Equality 2021 2020 J.D. Power 2020 Forbes The Best Employers for Diversity 2020 Forbes The Best Employers for Women 2020 Bloomberg Gender-Equality Index 2020 Climate Leadership Awards 2020 TSIA Rated Outstanding In Assisted Support Certification	*
21	What percentage of your sales are to the governmental sector in the past three years?	Approximately 30% of Pitney Bowes sales have been to the governmental sector in the past 3 years	*
22	What percentage of your sales are to the education sector in the past three years?	Approximately 8% of our sales have been to the education sector in the past 3 years.	*
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	Pitney Bowes has cooperative agreements with Sourcewell, NASPO, E&I and some individual states. Annual sales volume is considered confidential and proprietary.	*
24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	MAS Schedule# 47QSMA21D08R3 • GS-25F-0010M Although Pitney Bowes Inc. does not share its contract sales and reporting with other entities, PBI must adhere to the Federal Acquisition Regulation listed below. I-FSS-639 CONTRACT SALES CRITERIA (MAR 2002) (a) A contract will not be awarded unless anticipated sales are expected to exceed \$25,000 within the first 24 months following contract award, and are expected to exceed \$25,000 in sales each 12-month period thereafter. (b) The Government may cancel the contract in accordance with clause 552.238-73, Cancellation, unless reported sales are at the levels specified in paragraph (a) above.	*

Table 2B: References/Testimonials

Line Item 25. Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *	
State of Maine. Our statewide contract is based on our current Sourcewell contract 011322-PIT	Justin Franzose	207-624-7337	*
State of Maryland. we have a PA with them base on our current 011322-PIT contract	Mike Meyers	410-767-4281	*
State of Arkansas	Jeff Stearns	501-682-7627	*

Table 3: Ability to Sell and Deliver Solutions (150 Points)

Describe your company's capability to meet the needs of Sourcewell participating entities across the US and Canada, as applicable. **Your response should address in detail at least the following areas:** locations of your network of sales and service providers, the number of

workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *
26	Sales force.	Pitney Bowes have approximately 150 full time field sales force employees. The sales force handles dedicated account portfolios for their respective accounts, Review client requirements, analysis, discuss needs with clients, provide quotations and all other aspects of the pre-sales, implementation, and post-sales process. In addition to our field sales force, we have 17 inside sales force employees. Our inside sales force provides similar functions as our Direct Field Sales force but from our Shelton office. Members of this team do not have a dedicated account portfolio.
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	Pitney Bowes has multiple channels to fully serve Sourcewell members. *Direct Sales - A field network of professional direct sellers committed to discovering and fulfilling the needs of members. Each is trained on and has full access to our Sourcewell contract and pricing in addition to our product line. They also have support from many teams of specialists to ensure further product knowledge support. *Inside Sales - Similar to Direct Sales in terms of training and support but these sellers help members from an office posture rather than direct calls. They can engage Direct Sales when needed to make live calls with Members. *Dealers(Partners) - Several are located around the country to compliment our direct and inside sales. Ensure all members regardless of geographic location have full sales and service support. These Partners are supported directly by a PB team that ensure contract compliance and pricing.
28	Service force.	Pitney Bowes offers superior client care for the members with the below support model: * 328+ certified field service technicians in North America * 95% satisfaction rate for service technician repairs, * 95% satisfaction rate with equipment installation (North America) * Highly skilled, fully certified and security cleared technicians with an average of 20 years of experience * Support for our customers in every zip code across the U.S., Alaska, and Hawaii * Remote problem resolution - on average, 66% of our hardware and 92% of our software problems are resolved without service dispatch * 91K+ field service dispatch requests handled annually, with 82% first contact resolution
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	Orders are place through our sales representatives, whether they are field representatives, inside sales representatives or dealer representatives. All pricing and paperwork are generated by our centralized online quoting system to ensure contract price and paperwork compliance with the contract. Client either generates an appropriate purchase order or signs the lease/sales paperwork. Once an executed agreement is obtained, the sales representative uses the same system to place the order ensuring fulfillment accuracy and timeliness.
30	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	Pitney Bowes Inc. delivers a comprehensive technical support ecosystem, combining rapid response, expert service technicians, flexible SLAs, and software lifecycle management. Its structured and tiered service programs are designed to meet a wide range of Sourcewell—from self-service tools to premier-level, personalized technical assistance. It also offers a robust and flexible technical support framework designed to ensure peak performance, uptime and long-term value from its mailing, shipping and software solutions.Please refer to PBI Technical Support Overview document for more information.
31	If proposing to serve participating entities in the US, describe how your organization's abilities and capabilities will ensure effective delivery of the proposed products and services.	We will provide products and services to all participating entities nationwide in all 50 states. We have both sellers and service technicians located around the US, not just centrally located in one geography or call center. In addition our Dealer network further enhances and supports that reach to ensure that all members regardless of geographic location get the personalized, professional service and care they expect.
32	If proposing to serve participating entities in Canada, describe how your organization's abilities and capabilities will ensure effective delivery of the proposed products and services.	Pitney Bowes Inc. is not submitting a proposal for the Canada region as part of this solicitation. This proposal is limited to services and deliverables within the United States only.
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	Pitney Bowes Inc. will provide service coverage across the entire United States only.
34	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	All Participating Entities in the United States will have full access to our Solutions.

35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	US territories are not included under this contract. Pitney Bowes does not have any requirements or restrictions on Alaska or Hawaii.	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	The Master Agreement may be extended to nonprofit entity member(s), under our commercial pricing and lease terms.	*

Table 4: Marketing Plan (100 Points)

Line Item	Question	Response *	
37	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	Pitney Bowes will be proud to market our new contract to current and prospective Sourcewell members. As it has been for most of the last two decades, our Sourcewell contract continues to remain critical to the success of our State and Local Government program and we treat it as such. Items important in this endeavor are: Pitney Bowes Marketing Plan for Sourcewell Contract Pitney Bowes will be proud to market our new contract to current and prospective Sourcewell members. As it has been for most of the last two decades, our Sourcewell contract continues to remain critical to the success of our State and Local Government program and we treat it as such. Items important in this endeavor are: Internal Education and training: Pitney Bowes continues to have strong, consistent quarters on our current Sourcewell contract and one of the strengths that led to that is the internal education of and visibility to our varied sales channels. Sales professionals will talk about and present what they are comfortable with and we at Pitney Bowes ensure that we provide the education necessary to enable our sales professionals to become comfortable presenting and talking about the Sourcewell contract. •Initial - our sales channels have been made aware of and educated on our current Sourcewell contract and the exciting offerings and values it brings to members. Initial announcement of the new contract and any changes from the existing contract will take a three-pronged approach all lead by our Vice President of Government and GPOs: oField sales – National communication to all sellers and managers announcing the new contract and the value it brings. In addition, at our national teams meeting for our predominant government sellers, we will be doing an in-depth review of the new contract and the value and benefits available to members. We will also utilize several of the Sourcewell Training Videos during this meeting specifically "What is a Sourcewell Contract" and "How Does a Sourcewell Contract Satisfy a Bid?" oInside sales – Online Microsoft Teams meetings with the appropriate inside sales team and their manager are conducted specifically to educate on the new Sourcewell contract and the value it brings to members. We will also utilize several of the Sourcewell Training Videos during this meeting specifically "What is a Sourcewell Contract" and "How Does a Sourcewell Contract Satisfy a Bid?" oDealers – Microsoft Teams meetings with the Regional Partner Managers, that manage our dealers, to educate them on the new contract and the value to members. They will in turn have additional meetings with their assigned dealers to disseminate the information and ensure all are educated. During their individual regional breakout meetings with dealers, the training videos posted on the Sourcewell site will be used. oPricing tools – Upon award, the computerized pricing tool that all channels utilize will be updated on the first Thursday after award and will be immediately available for use and available to members. This will also ensure contract compliance. See Attached 2025 Pitney Bowes Marketing Plan - Sourcewell	*
38	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	Our Marketing team is constantly using social media to enhance the presence and client awareness of Pitney Bowes solutions, values and offerings. One of the most visible places is LinkedIn where there are new posts that go up on a daily basis. This platform tends to reach people in business, i.e. members, more so than other social media platforms. Please search LinkedIn for recent posts by Pitney Bowes.	*
39	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	Sourcewell has been an invaluable partner to Pitney Bowes for many years. By educating the members and prospects on the many benefits of cooperative procurement, Sourcewell had broadened and enhanced acceptance and adoption of all the contracts under its' umbrella. Pitney Bowes consistently talks to members and prospects about the value of our Sourcewell contract not only as price point but as for true cooperative procurement and the efficiency and process improvements that can bring. Our meetings with our current Sourcewell Supplier Development Executive are invaluable in discussion strategies, thoughts and enhancements as to how to even better be of service to members.	*
40	Are your Solutions available through an e-Procurement or e-Commerce ordering process? If so, describe your system(s) and provide one (1) example of how governmental and educational entities have successfully utilized them.	Due to the configurable nature of our products and services, Pitney Bowes does not offer an E-Procurement punch-out process at this time.	*

Table 5A: Value-Added Attributes (100 Points, applies to Table 5A and 5B)

Line Item	Question	Response *
41	Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.	PBI offers complete training for every product and service it sells. Basic installation and training is included with every quote. Members will be fully up and running, and trained on their new solution. PBI has found this leads to increase adoption of the solution throughout the entity along with increased member satisfaction. Additional or advance operator training is available and listed within the contract price book as well as unique configuration services any member may need.
42	Describe any technological advances that your proposed Solutions offer.	Please see attachment US- SendTech Product Catalog- Sourcewell Via millions of dollars spent in R&D, Pitney Bowes continues to bring to the market the solutions and value offerings member deserve and expect. Shipping 360 secure SaaS platform is just one such example which is outlined in the attachment along with many others.
43	Describe any "green" initiatives that relate to your company (e.g., recycling, LED lighting, LEED) or to your Solutions, and include a list of the certifying agency for each.	Pitney Bowes' environmental efforts in 2025 demonstrate a robust and multi-faceted sustainability initiative from facility upgrades and green product designs to certified climate reporting and renewable energy adoption. Each key action is validated by respected agencies, reinforcing the company's commitment to responsible environmental stewardship. 1. Commitment to achieve carbon neutrality by 2040 for operations and by 2050 for the broader value chain. 2. Conversion to high-efficiency LED lighting, upgraded HVAC and compressors supported by energy audits 3. Deployed real-time telematics and auxiliary power units in trucks to reduce idling. 4. Recognized PBI a U.S. EPA SmartWay Partner to benchmark and improve freight efficiency. 5. Achieved 57.8% renewable energy usage in deregulated U.S. sites surpassing the 2025 target. 6. Renewable Energy Certificates (RECs) overseen by U.S. regulatory bodies. 7. Recognition under U.S. EPA Green Power Partnership. 8. Multiple product lines (e.g., SendPro MailStation, SendPro C/P series, SendPro MailCenter, PitneyShip™ Cube) are ENERGY STAR® certified, reducing client energy consumption. 9. Certified U.S. EPA ENERGY STAR® Program. 10. Sustainable product lifecycle with take-back, remanufacturing, reuse and recycling initiatives. 11. Achieved a 14.1% reduction in CO₂ intensity (per revenue) and a 12.5% absolute emissions drop (Scopes 1 & 2) relative to 2019 baseline. 12. Partnership with EPA-authorized e-waste recyclers. 13. Historical recognition via EPA WasteWise Program 14. Verified through CDP and TCFD-aligned reporting frameworks.

44	Identify any third-party issued eco-labels, ratings or certifications that your company and/or equipment holds (e.g. ENERGY STAR, NEBB, United States Postal Service (USPS) certified) for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	Pitney Bowes Inc.'s primary environmental objective is to reduce the environmental impact of its products and services. PBI played a key role in collaborating with the EPA to develop the Energy Star subcategory applicable to mailing meters, and has remained committed to that approach. Our mailing meters have continued to meet these standards since their inception. Although there is no Energy Star category for non-printing equipment, PBI designs its other equipment with the same environmentally responsible mindset. A tangible outcome of this commitment is the development of a reverse supply chain to recover end-of-life equipment. These units are assessed for potential reuse or remanufacturing entire machines. The remanufactured units meet PBI's high-quality standards and are reintroduced to the market, significantly extending the lifecycle of our equipment. Another key focus of PBI's environmental efforts is the integration of recycled materials into our products, including ink cartridges and packaging
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	Please also see US SendTech Product Catalog-Sourcewell Pitney Bowes 360platform is the only one of its kind. It's the secure, full FedRAMP, GovRAMP and NIST800-53 approved, SaaS foundation shared by our suite of applications – including shipping, mailing inbound tracking, and smart locker software – designed to reduce the complexity of everything you send or receive. These applications work seamlessly together to give you complete visibility and control of shipping, mailing, and receiving operations across your organization whether it's a single location or multiple.

Table 5B: Value-Added Attributes

Line Item	Question	Certification	Offered	Comment
46	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or re-sellers if available. Select all that apply.		☐ Yes ☒ No	No
47		Minority Business Enterprise (MBE)	☐ Yes ☒ No	No
48		Women Business Enterprise (WBE)	☐ Yes ☒ No	No
49		Disabled-Owned Business Enterprise (DOBE)	☐ Yes ☒ No	No
50		Veteran-Owned Business Enterprise (VBE)	☐ Yes ☒ No	No
51		Service-Disabled Veteran-Owned Business (SDVOB)	☐ Yes ☒ No	No
52		Small Business Enterprise (SBE)	☐ Yes ☒ No	No
53		Small Disadvantaged Business (SDB)	☐ Yes ☒ No	No
54		Women-Owned Small Business (WOSB)	☐ Yes ☒ No	No

Table 6A: Pricing (400 Points, applies to Table 6A and 6B)

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *	
55	Describe your payment terms and accepted payment methods.	Net 30. Credit Card, Cash, Check, ACH	*
56	Describe any leasing, financing, or as-a-service options available for use by participating entities. Describe how these options account for upgrading to newer models to mitigate the risk of equipment obsolescence.	Pitney Bowes Global Financial Service LLC is pleased to offer three different leasing programs, FMV Lease options, LTOP Lease option and our Operating Lease option. All of these options provide for varying durations from 24 to 60 month lease terms to fit the individual needs of the entity.	*
57	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	See our attached sample lease and purchase agreements as well as Attachment 2 - State and Local FMV lease terms, Attachment 3 - State and Local LTOP lease terms, Attachment 4 - State and Local Operating lease terms, and Attachment 8 - Send-Tech US Sales-Lease Internet Terms.	*
58	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	Yes, for all items except for payment of actual postage. No additional cost is incurred by participating entities.	*
59	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	Line Item Discounts - MSRP less a percentage discount. See our Sourcwell price list uploaded with this response.	*
60	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	Pitney Bowes is offering a range of discount off MSRP from 0-42%.	*
61	Describe any quantity or volume discounts or rebate programs that you offer.	N/A	*
62	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "non-contracted items". For example, you may supply such items "at cost" or "at cost plus a percentage," or you may supply a quote for each such request. Define the costs/fees associated with "sourcing/quoting" products and related services.	Pitney Bowes is proud to have our entire product line included in our pricelist.	*
63	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	N/A	*
64	If freight, delivery, or shipping is an additional cost to the Sourcwell participating entity, describe in detail the complete freight, shipping, and delivery program.	All freight and shipping is included in any purchase or lease quotes given to a member.	*
65	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Alaska and Hawaii receive the same pricing as the other states. We are not including Canada or US territories in our response.	*
66	Describe any unique distribution, delivery, or deployment methods or options for the goods and services offered in your proposal.	N/A	*
67	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcwell. This process includes ensuring that Sourcwell participating entities obtain the proper pricing.	At Pitney Bowes contract compliance is of supreme importance. Access to Sourcwell pricing is integrated into our electronic online pricing tool which is available to all sellers regardless of channel. This tool ensures compliance to contracted pricing and is not alterable by the sales representative. Client accounts also have a visual identifier in our system that further alerts the representative. Clients are verified against the online Member Lookup portal on the Sourcwell site before pricing is quoted. Our quarterly usage reports draw sales directly from the system and are verified. As has been demonstrated over the last five years of the current contract, only very rarely is therean error which is quickly remedied.	*

68	If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.	One internal metric and probably the most important will be the client satisfaction scores received from our Sourcewell clients. Members deserve and expect superior customer service and satisfaction, especially from the pre-eminent industry leader. It is not just about growing GPO or supplier revenue but truly satisfying the wants, needs and desires of the members. The NAST and other scores allow us to constantly improve our service to clients. When those clients are very satisfied, the quarterly usage reports will be reflective of that.	*
69	Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The propose an Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.	Pitney Bowes is pleased to offer a 1% administration fee to Sourcewell under this contract.	*

Table 6B: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments	
70	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	Given similar volume and terms/conditions	*

Table 7A: Depth and Breadth of Offered Solutions (200 Points, applies to Table 7A and 7B)

Line Item	Question	Response *	
71	Provide a detailed description of all the Solutions offered, including used Solutions if applicable, offered in the proposal.	Pitney Bowes offers the widest width and breadth of software and hardware solutions in the industry. This multitude of options allows Pitney Bowes to fulfill the needs and wants of members regardless of their size or the ease/complexity of their operation. Shipping solutions, Mailing solutions, Lockers and Receiving solutions, Business automation, Professional Services, Financial services, are the main categories. For descriptions of each please see the attachment "PBI Response Sourcewell RFP 070125" as it will not all fit in this box.	*
72	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	Subcategories include but are not limited to" *Mailing solutions - semi-automatic mailing machines, autotmatic mailing machines, production mailing machines, letter openers Shipping solutions - SP360,	*
73	Describe how your solution(s) can be tailored to meet the unique operational, compliance, and integration requirements of public sector agencies. Include one (1) example of previous work with public sector agencies where your solution(s) was customized.	The members in the public sector do have some unique needs when it come to shipping and mailing. The transparency need and accountability for items is of critical importance. With those needs in mind, which are similar to but sometimes different from the commercial sector, Pitney Bowes offeres our government clients the ability to tailor our solutions for thier needs. One of the most critical areas for our government clients is around data security. This is of extreme importance and is mission critical. We are the only supplier in the industry that can offer a total NIST 800-53, StateRAMP/GovRAMP and FedRAMP approved solution. This modular system can start for a member with a singular mailing machine if that is the need but has scalabilitiy to cover and entire state agency or department if needed. There is no workflow too small or large not to have the data security and peace of mind that all members need nowadays. One great example of this is a commonwealth in the eastern United States. They started off a couple of years ago with a data security approved solution for a singular department. The presssing workflow need there was to get rid of a hand logging solution for inbound items, 51 locations, and proceed with an accurate but very secure SaaS solution to provide audit trails, security of information and reconciliation while improving workflow and reducing FTE required time. This agency has such success with the new soltuion after it was implemented that the same secure, approved Saas platform has now been implemented by many more of their departments. The security and scalability are nearly limitless and help members of all types and sizes.	*

74	Describe your mail tracking capabilities. Specifically, how your technology ensures secure, accurate, and real-time tracking for sensitive or compliance-driven mailings (e.g., ballots, legal documents). Include details on audit trails, reporting functions, visibility tools provided, and how your solution addresses security, chain-of-custody, and compliance requirements.	One of many examples is around our Certified Mail: The simpler, convenient, more efficient way to send Certified Mail®: Switching to electronic Return Receipts saves you time and money by eliminating the old traditional "green cards". Plus, they greatly reduce compliance and data security errors Improve your Certified Mail process: Simplify every step: Prepare, send, and track Certified Mail effortlessly with electronic return receipts automatically filled, captured, and stored for easy tracking. Access for employees anywhere, anytime: Powered by the Shipping 360® platform, PitneyShip lets employees process, track, and retrieve signatures from anywhere. Eliminate manual forms and processing: Skip complicated USPS forms—log in to PitneyShip from anywhere to send Certified Mail with electronic return receipts. Save time and money: Save \$1.48* on every mail piece and avoid hours of manual processes and costly mistakes. *as of July 14, 2024 Easily store and retrieve digital signatures: Digital signature files are securely stored in PitneyShip, making it easy to find and retrieve electronic Return Receipt signatures anytime. No more green cards: The electronic Return Receipt replaces the physical green card with a PDF, automatically uploaded to PitneyShip. It includes all necessary information and a digital signature, so you never have to worry about lost green cards. Certified Mail with electronic Return Receipt option: Certified Mail Coversheet with Postage: A simple option that prints a coversheet that includes postage, addresses, and Certified Mail barcode in one step. The coversheet and documents are then place inside Certified Mail double-window envelope for mailing. Preprinted Certified Mail Barcode Label: This option uses preprinted Certified Mail barcode labels that you scan or enter into the software, attach the label to your mail piece, and then add postage. Printing Certified Mail barcode labels: Similar to the preprinted label, except PitneyShip generates the Certified Mail tracking barcode and prints it to a label roll that is then attached to your mail piece. When should I use Certified Mail? If you're looking to send mail that provides proof of mailing via a receipt to the sender, then Certified Mail® is the USPS service for you. With electronic USPS tracking, the sender is notified when the mail piece was delivered or that a delivery attempt was made. What are my options when using Certified Mail? Return Receipt and Restricted Delivery provide evidence of Certified Mail delivery with a signature. There two ways to get signatures. The traditional way is a postcard signed by a recipient at the destination address that is then mailed back to you, the sender. There is another option called Electronic Return Receipt where the sender receives an electronic copy of the recipient's signature rather than the post card. In addition to eliminating all of the manual steps to create and track Certified Mail, Electronic Return Receipt also saves you \$1.48 on every Certified Mail piece. How do I get access to Certified Mail with ERR? PitneyShip makes it easy to prepare, send, and track Certified Mail and the eliminate the need for cumbersome forms. With PitneyShip, there is no need to handwrite Certified Mail forms and green cards any longer. PitneyShip automatically stores all the information, including Certified Mail tracking number, certified delivery date, and the certified mail recipient signature, in an easily accessible and searchable database. You then save \$1.48 using one of the options for Electronic Return Receipt in PitneyShip.
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Table 7B: Depth and Breadth of Offered Solutions

Indicate below if the listed categories of Solutions are offered within your proposal. **Provide additional comments in the text box**

provided describing how your proposed solution(s) meet or exceed the category and/or sub-category.

Line Item	Category	Sub-Category	Offered *	Comments *	
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75	Mail and Parcel Handling	Receiving and inbound processing	☒ Yes ☐ No	Streamline incoming shipments while eliminating manual processes: PitneyTrack® Inbound is our cloud-based receiving solution that improves inbound package delivery with real time tracking and chain of custody reporting, creating a smarter way to receive and track packages. Automatic tracking and logging of incoming packages into secure databases. Capture package details automatically with simple package barcode scanning. Seamless integration with ParcelPoint™ Smart Lockers for streamlined package distribution. Why PitneyTrack Inbound?: Eliminate manual tracking End manual tracking and logging of incoming items, minimizing the potential for errors or lost items. Access from anywhere in your organization Get reports and package tracking details to end recipients from anywhere in your organization. Automatic updates and easy scalability Automatic updates and easy scalability mean less IT resources needed to deploy and maintain the solution. Intuitive customizable mobile app The intuitive mobile app allows you to organize workflows in a way that is most efficient for you. What is PitneyTrack Inbound?: PitneyTrack Inbound is an inbound package tracking solution that provides real-time tracking status and recipient details of inbound packages as they move through an organization. It establishes chain of custody, so you'll know what came in, who it was for, and when it was delivered to the final recipient. What are the benefits of mail center automation?: Mail center automation increases efficiency and productivity which leads to a more positive experience for package and mail recipients. With significant increases in package and mail volumes, mail center automation: *Eliminates manual data entry with simple barcode scans. *Reduces the likelihood of human error *Creates an accurate chain of custody, which reduces lost packages *Allows mail center employees to focus on other tasks How does inbound package tracking work?: PitneyTrack® Inbound is a tracking software that records a chain of custody for all your inbound packages – from arrival to confirmed pickup. With barcode scanning, automatic notifications, and delivery documentation, PitneyTrack Inbound captures all the information needed for complete transparency, greater control, and full chain-of-custody reporting so you will always know what came in, who it was for, and when it was delivered to the final recipient. For organizations that want to offer convenient 24/7 delivery, PitneyTrack Inbound seamlessly integrates with ParcelPoint™ Smart Lockers. Together, they provide full, end-to-end visibility for each package, matched with the confidence they'll be delivered safely and securely. Who is PitneyTrack Inbound ideal for?: It's ideal for organizations with centralized shipping and mailing operations that need visibility and comprehensive tracking of incoming packages and mail through delivery to the end recipient. What information is captured with an inbound scan?: When an inbound package barcode is scanned, PitneyTrack Inbound automatically captures all relevant package information including, carrier, tracking number, and date received. You also have the option to add additional information including sender and recipient names, as well as add in comments or take a photo of the package. Does PitneyTrack Inbound allow you to track other items?: Our inbound package tracking solution monitors mail and packages as they move through your organization. PitneyTrack Asset is our asset tracking solution that helps you manage valuable internal resources—such as IT equipment, tools, and other high-value items—from receipt to distribution. Together, these solutions streamline tracking processes, so you always know what you have and where it is.
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76		Mail sorting equipment	☒ Yes ☐ No	Separating customer documents by page count is time- consuming and whether you and your team are stuffing envelopes by hand or with a folding inserting machine, your process is susceptible to errors. The consequences of these errors can range anywhere from a bad customer experience to losing a customer and even facing heavy fines for violating customer privacy. The Pitney Bowes Commerce Cloud, makes it simple to add 2D barcodes to your documents that your folder inserter then reads to automatically assemble your variable page documents into the right envelopes. By leveraging the speed and flexibility of SaaS, you can add intelligence to your folder inserter to enhance efficiency and privacy protection with ease. Fold documents. Stuff envelopes. Protect sensitive information. Mail is still an important way to communicate with your customers. But you don't want to spend more time than you need handling paper and envelopes. The Relay® folder inserters make it simple to process mail faster and more accurately than doing it by hand, so you can focus on more important tasks. You save valuable time and money, while gaining the peace of mind that your communications are assembled accurately and mailed on time.	*
77		Packaging, preparation solutions	☒ Yes ☐ No	Create mail that stands out from the crowd. Whether you use mail to generate new sales, renew donors, retain customers or conduct special promotions, every piece of mail counts. Each person on your mailing list receives dozens of pieces of mail every week —and they all compete for attention. That means you need to create mail that stands out as it's critical to the success of your business. With a powerful addressing solution from Pitney Bowes, you can achieve better-looking mail, improved productivity and results, plus lower costs by creating more compelling envelopes, delivering mail to the right person and finishing mail quickly and lowering costs.	*
78		Shipping integration	☒ Yes ☐ No	The Shipping 360 platform is the secure SaaS foundation shared by our suite of applications designed to reduce the complexity of shipping and mailing. Pitney Bowes offers various shipping integrations to streamline mailing and shipping processes for businesses of all sizes. These integrations include options for shipping software, APIs, and partnerships with major carriers like USPS, UPS, and FedEx. Pitney Bowes also provides multi-carrier solutions, allowing businesses to compare rates and services across different providers. Key aspects of Pitney Bowes shipping integration: Shipping APIs: Pitney Bowes provides APIs for integrating shipping services into e-commerce platforms and other business systems. These APIs follow REST principles and use JSON for data exchange. Multi-Carrier Solutions: Businesses can access discounted rates and shipping services from multiple carriers, including USPS, UPS, FedEx, and others, through Pitney Bowes' multi-carrier shipping solutions. Shipping Software: Pitney Bowes offers shipping software like PitneyShip and PitneyShip Pro, which simplify label printing, postage purchase, and shipping management. These tools can be integrated with e-commerce platforms like Shopify. Presort Services: For businesses sending large volumes of mail, Pitney Bowes Presort can significantly reduce postage expenses and improve delivery speed by sorting and preparing mail for the USPS. Carrier Partnerships: Pitney Bowes has partnerships with major carriers like FedEx, allowing users to integrate their FedEx accounts with PitneyShip software for simplified shipping. Complete Payment Services: Pitney Bowes can advance funds to USPS on behalf of businesses, providing a consolidated monthly bill for postage, shipping charges, and supplies. Shipping 360 Platform: This platform offers access to various carriers, automated workflows, and integrations with ERP and other systems for streamlined shipping processes.	*

79	Tracking and Software	Mail/parcel tracking software	☒ Yes ☐ No	Streamline incoming shipments while eliminating manual processes: PitneyTrack® Inbound is our cloud-based receiving solution that improves inbound package delivery with real time tracking and chain of custody reporting, creating a smarter way to receive and track packages. Automatic tracking and logging of incoming packages into secure databases. Capture package details automatically with simple package barcode scanning. Seamless integration with ParcelPoint™ Smart Lockers for streamlined package distribution. Why PitneyTrack Inbound?: Eliminate manual tracking End manual tracking and logging of incoming items, minimizing the potential for errors or lost items. Access from anywhere in your organization Get reports and package tracking details to end recipients from anywhere in your organization. Automatic updates and easy scalability Automatic updates and easy scalability mean less IT resources needed to deploy and maintain the solution. Intuitive customizable mobile app The intuitive mobile app allows you to organize workflows in a way that is most efficient for you. What is PitneyTrack Inbound?: PitneyTrack Inbound is an inbound package tracking solution that provides real-time tracking status and recipient details of inbound packages as they move through an organization. It establishes chain of custody, so you'll know what came in, who it was for, and when it was delivered to the final recipient. What are the benefits of mail center automation?: Mail center automation increases efficiency and productivity which leads to a more positive experience for package and mail recipients. With significant increases in package and mail volumes, mail center automation: *Eliminates manual data entry with simple barcode scans. *Reduces the likelihood of human error *Creates an accurate chain of custody, which reduces lost packages *Allows mail center employees to focus on other tasks How does inbound package tracking work?: PitneyTrack® Inbound is a tracking software that records a chain of custody for all your inbound packages – from arrival to confirmed pickup. With barcode scanning, automatic notifications, and delivery documentation, PitneyTrack Inbound captures all the information needed for complete transparency, greater control, and full chain-of-custody reporting so you will always know what came in, who it was for, and when it was delivered to the final recipient. For organizations that want to offer convenient 24/7 delivery, PitneyTrack Inbound seamlessly integrates with ParcelPoint™ Smart Lockers. Together, they provide full, end-to-end visibility for each package, matched with the confidence they'll be delivered safely and securely. Who is PitneyTrack Inbound ideal for?: It's ideal for organizations with centralized shipping and mailing operations that need visibility and comprehensive tracking of incoming packages and mail through delivery to the end recipient. What information is captured with an inbound scan?: When an inbound package barcode is scanned, PitneyTrack Inbound automatically captures all relevant package information including, carrier, tracking number, and date received. You also have the option to add additional information including sender and recipient names, as well as add in comments or take a photo of the package. Does PitneyTrack Inbound allow you to track other items?: Our inbound package tracking solution monitors mail and packages as they move through your organization. PitneyTrack Asset is our asset tracking solution that helps you manage valuable internal resources—such as IT equipment, tools, and other high-value items—from receipt to distribution. Together, these solutions streamline tracking processes, so you always know what you have and where it is.
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80		Integration with ERP/CRM systems	☒ Yes ☐ No	Pitney Bowes integrates with various Enterprise Resource Planning (ERP) systems to streamline shipping and logistics processes. This integration allows businesses to automate data flow between ERP systems and shipping platforms, enhancing efficiency and accuracy in order fulfillment and inventory management. Benefits of Pitney Bowes ERP Integration: Enhanced Efficiency: Automation of data flow reduces manual data entry, minimizes errors, and speeds up order processing times. Improved Accuracy: Real-time data synchronization ensures consistency across shipping and sales channels, crucial for order fulfillment and inventory management. Cost Reduction: Automated processes can lead to lower labor costs and reduced errors, as well as optimized inventory management, minimizing holding costs. Scalability: ERP systems, especially cloud-based ones, can accommodate increased data volume and complex processes as businesses grow, making them ideal for scaling shipping logistics. Examples of Integrations: ShipAccel: Pitney Bowes' ShipAccel offers integrations with major ERP systems like QuickBooks, NetSuite, and MS Dynamics. Oracle Fusion Cloud ERP: Constacloud's Commercium platform provides a connector for integrating Pitney Bowes with Oracle Fusion Cloud ERP, allowing for seamless order and tracking information exchange. Epic: PitneyShip Pro and PitneyShip Enterprise can be integrated with Epic Systems for shipping label creation and management. Two-Tier ERP: Pitney Bowes also utilizes a two-tier ERP strategy, leveraging SAP S/4HANA Cloud for international markets while maintaining a core ERP system in North America, demonstrating a strategic shift towards agility and flexibility. How it Works: ERP integration with Pitney Bowes typically involves connecting the ERP system to Pitney Bowes' shipping platform, allowing for the exchange of data related to orders, shipping details, tracking information, and more. This can be achieved through various methods like using Integration PaaS (platform as a service), Enterprise Service Bus (ESB), or point-to-point integrations, according to Tipalti. The specific method and implementation details vary depending on the chosen ERP system and Pitney Bowes' integration capabilities. In essence, Pitney Bowes ERP integration streamlines shipping and logistics by connecting the two systems, enabling businesses to manage their operations more efficiently and effectively.
81		API availability for custom integration	☒ Yes ☐ No	Shipping APIs Overview¶ Introduction The Pitney Bowes Shipping APIs let you integrate Pitney Bowes shipping services into your platform. The APIs follow the principles of the REST architectural style and use HTTP as the underlying protocol. All requests use HTTPS. Responses include success or failure messages and any requested resources. Resource objects use JSON formatting. The Shipping APIs comprise the following: Shipping APIs: Resources for full-featured shipping integration with multiple carriers. To enroll merchants with the Shipping APIs use the Merchant Accounts APIs. Merchant Accounts APIs: Resources for adding and managing the shippers who use the Shipping APIs. This page describes the components of the Pitney Bowes Shipping APIs. To get quickly started with the APIs after reading this Overview, see Getting Started. Developer Account To use the Pitney Bowes Shipping APIs, you must have a Pitney Bowes developer account. You can create a free account and access the Sandbox test environment by going to Pitney Bowes Developer Hub Signup. To sign up, use a regularly monitored email, such as a distribution list. The email address you choose cannot be changed. Once you create a developer account, you can begin testing the APIs on the Sandbox environment. To begin testing the APIs, see the Getting Started page. You can access your developer account at any time at Pitney Bowes Developer Hub.

Developer Hub gives you access to your API keys, merchants, transaction history, and other information. If you use the Production environment, Developer Hub gives you access to your postage balances and payment options. For questions on developer accounts, see the Developer Account FAQs or contact Pitney Bowes at ShippingAPIBusinessDevelopment@pb.com.

To upgrade to the Production environment, contact Pitney Bowes at ShippingAPIBusinessDevelopment@pb.com.

Note If you are a third-party integrator, your client should own the developer account. For more information, see Third-party integrators should not own developer accounts on the Best Practices page.

Merchants

When you print a shipping label through the Shipping APIs, you do so on behalf of a merchant. Your developer account comes with a default merchant, and you can add multiple additional merchants as described in Manage Merchant Accounts. Each merchant enrolled in your developer account has a unique Shipper ID. You reference the ID when requesting transactions on the merchant's behalf.

To print labels for your real-life shippers, you must add them as merchants in your developer account. The Pitney Bowes Shipping APIs support two models for adding merchants and handling their postage payments. Both are described in Manage Merchant Accounts.

Carriers

When you add a merchant to your developer account, the merchant has access to print USPS® labels through PB Expedited and USPS PMOD. The APIs integrate with other carriers as well, and once a merchant enrolls with your developer account, you can add other carriers to the merchant's account. For available carriers and onboarding instructions, see Carriers.

API Environments

The APIs have separate Sandbox and Production environments, which are described below. Each environment has its own set of base URLs, which are the common prefixes for groups of API operations in the environment. The following shows the Production environment's Rates API call with the base URL underlined:

Base URL

Sandbox Environment

The Sandbox environment is a free test environment that is intended for all your development and testing work prior to deployment on Production. Sandbox gives full access to all the API calls available on Production but prints only test labels. Sandbox does not use real money. Your Pitney Bowes developer account provides free access to the Sandbox environment.

Note The Sandbox environment has daily limits on the number of requests you can make per API resource. The limits differ per resource but accommodate daily testing and development. The limits do not accommodate load tests. If you exceed the daily limit for a resource, contact Client Support at ClientSupportTechServices@pb.com and ask that your limit be reset for the day.

Sandbox Base URLs

Shipping and Merchant Accounts APIs:

https://shipping-api-sandbox.pitneybowes.com/shippingservices/*

Authentication API:

https://shipping-api-sandbox.pitneybowes.com/*

Production Environment

To use the Production environment you must upgrade your developer account. Production uses real money and prints labels used for real shipments. Never use the Production environment for testing. Before you can upgrade to Production, you must add a payment method to your developer account. Note that you cannot use your existing Sandbox merchants in the Production environment but instead must add the merchants to Production separately.

Production Base URLs

Shipping and Merchant Accounts APIs:

https://shipping-api.pitneybowes.com/shippingservices/*

Authentication API:

https://shipping-api.pitneybowes.com/*

Comparison of the Environments

For a comparison, see [What are the differences between Sandbox and Production?](#)

PB Postage Accounts

When you upgrade to a Production developer account, you set up a PB Postage Account to pay shipping costs. Both developers and merchants can have PB Postage Accounts. A merchant will have a PB Postage Account if paying for postage directly, as described in Manage Merchant Accounts. For FAQs on PB Postage Accounts, see Payments FAQs.

HTTPS Requirement

All API requests must use HTTPS. HTTPS uses Transport Layer Security (TLS) to verify

the identity of the accessed API server and to encrypt communications.

TLS

The minimum supported security protocol for connection to the APIs is TLS v1.2.

To test whether your servers support TLS v1.2: From your servers, issue the following GET operation. The operation retrieves a resource that accepts only the TLS v1.2 protocol:

```
curl -X GET https://api-test.pitneybowes.com/tstest
```

The following response confirms your servers support TLS v1.2:

200 OK

TLS_Connection_Success

For help or questions, please contact Client Support at ClientSupportTechServices@pb.com.

Authentication

Each request to the APIs requires authentication via an OAuth token generated from the key and secret associated with your developer account. You pass the OAuth token in the Authorization header when making an API call. To generate a token, invoke the Generate OAuth Token API using the key and secret for the environment to be accessed (Sandbox or Production). Once generated, an OAuth token is reusable for 10 hours.

HTTP Request Headers

All API requests require one or more HTTP headers. All requests require the Authorization header, which authenticates the developer to the APIs. Please see a request's documentation page for the required headers for that request.

Important: Do not pass a header that you do not intend to use. Instead, omit the header.

Important: Do not pass a header with the NULL value.

API Resources

For lists of the API resources, see the following:

Shipping and Accounts Resources

Versions

Each request URL includes the API's version number. For example, v2 in the following API call:

```
POST /v2/developers/{developerId}/merchants/registration
```

API Responses

All API requests return an HTTP response that includes an HTTP status code, HTTP response headers, and, if applicable, a response body containing JSON-formatted data. The HTTP status code indicates the success or failure of the request. The request body, if present, contains either a resource object (returned by a successful request) or error information (if the request failed). If a request returns a large result set, the API spreads the result set over multiple pages. For requests that do this, the documentation for the API request gives details.

Errors

If an error occurs, the APIs return application-specific error information in the response body. Pitney Bowes provides a standard structure for returned errors. To use the standard structure, include the X-PB-UnifiedErrorStructure header set to true with each API request. For more information, see Error Object.

For a list of error codes and links to solutions, see Error Codes.

API Status

Pitney Bowes provides a status portal at <https://apistatus.pitneybowes.com/>. The status portal displays:

Up-to-date status of the APIs

Scheduled maintenance windows

Information on past incidents

Support

This documentation provides a set of Best Practices to follow to avoid problems. If you do encounter an issue, please contact us for help resolving it. For answers to common questions, please see the Shipping FAQs and Accounts FAQs.

Client SDKs

See Client SDKs.

82	Postage and Optimization	Postage meters/systems	☒ Yes ☐ No	Take control of your mailing with metered mail. Metered mail is simply the most practical way for businesses of all sizes to skip the Post Office and easily buy and print USPS® postage. Whether you need to print First-Class® postage or stamps or Priority Mail® shipping labels, SendPro® has an easy-to-use postage meter designed to fit your specific needs and sending volumes. You can even compare rates across USPS, UPS® and FedEx® and access pre-negotiated savings with an optional multi-carrier subscription. Buy and print postage online, from anywhere. Skip the trip to the post office and print the exact postage you need at any time, from anywhere. From empowering employees to running a home-based business, online postage saves you time and money. Compare rates across carriers, buy postage and print shipping labels online, schedule pickups and track packages—all from your office, home or on-the-go.	*
83		Postal cost optimization	☒ Yes ☐ No	Powerful Analytics Consolidated Views • Actionable Insights • Expert Recommendations Mail accounting and expense management solutions. Our enterprise-wide Analytics consolidate and automate billing and reporting, allowing you to simplify your mail and package related expense management. Businesses constantly face the dual competing pressures of trying to manage costs while also maximizing their spend, attempting to thread the needle between these two needs so they either meet or come under budget. This has only been further exacerbated by the current business climate, where increased remote work has created a decentralized work environment that makes it even harder to control costs. Mail and shipping may not, on paper, seem like the most obvious place to find savings. Not only is that not the case – enterprises stand to reap tens to hundreds of thousands of dollars in savings with more efficient methods of sending packages and mail. What's driving your shipping and mailing costs: • The carriers selected for shipping certain parcels or documents. • The shipping services selected with those carriers (e.g. USPS First-Class Mail® vs. Priority Mail®). • How much time employees spend on handling inbound receivables. • Different standards for shipping and mailing processes across departments. • Lack of package carrier diversification All of these add up on the bottom line. In today's economic climate, enterprises need to find savings wherever they can. You could be sitting on a mountain of potential savings in your shipping, mailing and receiving services – but without the proper analytical tools, you'd never know it. At a time when everyone is working remotely, making every employee into a potential business shipper, being able to exercise greater scrutiny and transparency over the costs and time that go into your shipping and mailing functions is more essential than ever.	*
84	Mailroom Infrastructure	Purpose-built furniture/systems	☒ Yes ☐ No	Create an environment for success Pitney Bowes Furniture Solutions Catalog At Pitney Bowes, we are committed to protecting the environment. Pitney Bowes Furniture Solutions products are manufactured in a facility that operates under Bullfrog Power, a leading provider of 100% Green Electricity. Our Furniture Solutions products are GREENGUARD certified by the Indoor Air Quality Certification Program for Low-Emitting Products. A Furniture Solutions purchase may contribute up to 3 points towards LEED (Leadership in Energy and Environmental Design) under categories such as Recycled Content, Local/ Regional Materials, and Low Emitting Materials (such as GREENGUARD). All Pitney Bowes Furniture Solutions products carry a warranty against manufacturing defects. We take extra precautionary measures to protect your furniture during delivery, and we promise a quick replacement or repair for items found to have manufacturing defects or damages.	*

85	Secure storage/locker systems	☒ Yes ☐ No	Unique in the industry and driven by our SP360 FedRAMP/GovRAMP approved platform for full data security. ParcelPoint™ Smart Lockers streamline package and asset delivery Simplify inbound package handling with flexible, smart parcel lockers that deliver safety, security and convenience. Our intelligent, self-service lockers make package and asset delivery processes more efficient and offer numerous benefits for almost any organization. The convenient, secure way to meet package and mail delivery volume Contactless delivery: Smart locker solutions offer convenient, contactless package delivery and pickup, keeping both staff and recipients safe. Complete chain of custody: Seamlessly integrate delivery lockers with PitneyTrack® Inbound, ensuring you receive and deliver with ease. package 24/7 self-service access: Recipients receive automated alerts of incoming packages and assets, and can retrieve them at their convenience. Flexible Options: With indoor, outdoor and rear-loading lockers, we have a solution that will fit your specific volume, layout and workflow requirements. Prompt delivery and installation: Some locker options can be delivered in 4 weeks or less*. Plus, you can always rely on our superior end-to-end local service and support. *In the contiguous U.S How do ParcelPoint Smart Lockers facilitate contactless pick-up? Operator delivers an item to a smart locker, automatically triggering a notification, along with a barcode, to the recipient. At the locker, the recipient scans the access barcode and verifies their identification. The appropriate parcel locker door opens, allowing the recipient to take their item and go on their way. Streamline your mailroom workflow for package delivery Eliminate overstuffed mailrooms, long waiting lines and misplaced packages. Automatically notify recipients when they have a pickup, Secure, contactless delivery, 24/7. Provide a safe secure place to store personal belongings: Workplace Day Use provides your employees a secure place to temporarily store personal items with an easy-to-use self-service interface and unique barcodes for secure access. Flexible solutions, inside and out: We have a smart locker solution to fit specific volume, layout and workflow requirements. Our extremely durable and secure outdoor locker systems offer protection from moisture, heat cold and wind so your packages and assets are safe, secure and always accessible. Our Rear-loading indoor lockers offer ease of use and enhanced efficiency for package loading Smart lockers enhance government package deliveries: See how the State of Louisiana Office of Technology Services upgraded their in-person mail delivery to contactless delivery with smart parcel locker technology. Smart lockers for Higher education eliminate campus mail center chaos: Campuses everywhere are experiencing higher than normal package volumes. Pitney Bowes can help schools streamline their mail center processes with our smart locker receiving solutions.
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86	Support Services	Installation and configuration	☒ Yes ☐ No	Pitney Bowes offers installation and configuration services for its mailing and shipping equipment, ensuring seamless setup and optimal operation. These services include hardware and software installation, network configuration, and operator training, aiming to minimize startup time and maximize efficiency. They also provide support for various aspects of their products, such as mailing and shipping procedures, printing, and reporting. Key aspects of Pitney Bowes' installation and configuration services: Professional Installation: Pitney Bowes manages the entire installation process, from initial setup to ensuring your equipment is ready for use. Operator Training: They provide training to operators on how to effectively use the equipment, helping them maximize its potential. Network Configuration: This includes setting up wired and wireless network connections for your Pitney Bowes devices. Software Installation: They assist with installing necessary software like PC Meter Connect and DeviceHub, which are crucial for connecting and managing your devices.	*
87		Maintenance and repair	☒ Yes ☐ No	Pitney Bowes Equipment Maintenance You can count on Pitney Bowes to provide maintenance support that goes beyond traditional break/fix—with flexible contract arrangements to meet your business needs. With Pitney Bowes Global Services you can take advantage of data analytics provided through digital connectivity. Whether on-site, on-call or online, Pitney Bowes' expertise is at your service providing Technical Support with: •350+ certified field service technicians in NA/ 450+ worldwide •95% Satisfaction rate for service technician repairs, 98% Satisfaction rate with equipment installation •Highly skilled, fully certified and security cleared technicians with an average of 15+ years of experience •Support for our customers in every zip code across the U.S., Alaska and Hawaii•Remote problem resolution - on average, 66% of our hardware and 92% of our software problems are resolved without service dispatch •250K+ field service dispatch requests annually, with 84% first contact resolution Pitney Bowes will provide maintenance to cover the equipment under the full manufacturer's operating specifications and warranties throughout the period of performance of each order. When the equipment or any part fails to operate properly or to the manufacturer's specifications during this period, Pitney Bowes will work to remedy the issue in accordance with our standard service level agreement. Pitney Bowes provides semi-annual preventative maintenance scheduled by each location.	*
88		User training	☒ Yes ☐ No	Pitney Bowes offers complete training for every product and service we sell. Basic installation and training is included with every quote. Members will be fully up and running and trained on their new solution. We have found this leads to increased adoption of the solution throughout the entity along with increased member satisfaction. Additional or advance operator training is available and listed within the contract price book as well as unique configuration services any member may need.	*
89		Technical support and helpdesk	☒ Yes ☐ No	Pitney Bowes Customer Technical Support Count on our team of certified technicians to help prevent problems and quickly resolve any issues. Flexible service options integrate maintenance, technical support and systems monitoring to support your business needs. Standard SLA: Service Contracts provide access to factory-trained technicians with skills, experience, insight, and ability to advise or perform any necessary maintenance for your product. Pitney Bowes is at the ready to provide the technical and operational expertise needed to help you get peak performance and optimal value from your Pitney Bowes solution. We offer two service offerings for nearly every serialized piece of hardware from Pitney Bowes. A Standard Service Level (SLA) agreement is available in nearly every geographic location in North America, and we offer a Performance Service Level Agreement for select products and select geographic locations. Please contact your local Pitney Bowes Sales Representative for details on available Performance SLAs. Clients with or without a service contract can resolve many common issues or technical questions by visiting our product support web page https://www.pitneybowes.com/us/support.html. Remote Product Support: We have several methods to reach us for support. Please have your product model and serial number ready to help direct your inquiry to the correct team. The remote support	

agent can determine if your solution is covered by a service contract and provide a quote for support options if you do not currently have coverage. There is no limit on the number of contacts a client can make for support. All channels of support for North America are available in English and French-Canadian languages.

By Phone Hardware Support: 844 256 6444 Software & Intelligent Locker Support: 800 888 0286

Our automated voice message system is live 24-hours a day. You can hear account balance information and recent account activity. You can also listen to easy instructions for finding answers to your questions on our Support site.

*Remote support Representatives are available Monday through Friday between 8am and 8pm ET, excluding holidays.

Our goal is to answer the phone within 60 seconds.

By Chat

You can locate a link to open a chat session directly from the web support page for every product.

Please have your model and serial number available so the chatbot or agent can locate your account information.

PB's chatbot service can answer many product questions and is available 24 hours a day.

*Live chat may be available for select products Monday through Friday between 8am and 8pm ET, excluding holidays.

Our goal is to respond to a live chat request within 30 seconds

Create a Case

The feature Create a Case allows you to make your own support requests. Submit questions about

your account, billing, make a service request for technical support, or view your cases anytime.

Note: You must first create a profile to access case management online. Once you submit your case, you

will receive a confirmation number, and a Pitney Bowes representative will contact you.

*Normal Business Hours for remote support are Monday through Friday between 8am and 8pm ET, excluding holidays

SELF HELP. 24/7 access to web self-help, user guides and product support articles.

REMOTE TECHNICAL SUPPORT. PB provides all technical support via chat or phone ("Remote Support") unless

otherwise specified. To receive Remote Support, you will be asked for your model and serial number and any error codes to speed up validating the client and coverage entitlement. The support agent will view product and case history and begin the effort to understand the technical problem. It is advised that the caller can be near the machine to help provide feedback and perform test functions to narrow down the root cause. Our goal in remote support efforts is to have the client back in operation and possibly avoid additional down time waiting for an onsite technician.

ONSITE REPAIR (TRAVEL & LABOR). Travel and labor costs are included when your products are covered under a Standard SLA contract, except for excluded circumstances. A certified technician will come to the installed location to further diagnose a technical issue with your solution. They carry the tools, test equipment and advanced product knowledge needed to get your solution operational. Our Field Service professionals will also consult and make recommendations on getting the highest value from your solution.

PARTS. Our service technicians carry vehicle inventory for the most common OEM parts required to service your

equipment. In some cases, due to the sensitivity of components in the (heat or cold) environment of a vehicle, or the rare failure rate of a component, certain parts are not carried. When a technician does not have the part in inventory, they will order from their mobile device for an expedited delivery and arrange a follow up repair visit to coincide with the part arrival.

*Some wearable items are considered consumable, they can be ordered through our supplies web site, but they are not included in the Standard or Performance SLA. The remote support agent and/or the field service technician can consult with you on managing supplies

PREVENTIVE MAINTENANCE. With SLA coverage, you are entitled to up to two (2) preventative maintenance service calls per calendar year. Any preventative maintenance service calls beyond two (2) per calendar year are billed at the rate in effect at the time the preventative maintenance is delivered. PBI determines whether preventative maintenance is performed on-site or remotely. PBI will notify you when preventative maintenance is due, or you can request preventative maintenance service by contacting our remote support teams. Note: Our on-site service technicians customarily inspect select hardware products during every service visit to ensure you have trouble free operation and minimal downtime. They will replace any worn parts during every service visit and provide an update of work performed as preventative maintenance.

Only those Proposer Exceptions to Terms, Conditions, or Specifications that have been accepted by Sourcwell have been incorporated into the contract text.

Ensure your submission document(s) conforms to the following:

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
 2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
 3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
 4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."
- [Pricing](#) - Attachment 1 - PBI_Sourcewell Price Book.pdf - Thursday June 26, 2025 11:52:21
 - [Financial Strength and Stability](#) - Attachment 3 - PBI_Financial Data_FORM 10-K of 2024.pdf - Thursday June 26, 2025 11:53:08
 - [Marketing Plan/Samples](#) - 2025 Pitney Bowes Marketing Plan - Sourcewell.pdf - Thursday June 26, 2025 11:53:26
 - WMBE/MBE/SBE or Related Certificates (optional)
 - [Standard Transaction Document Samples](#) - Pitney Bowes Standard Transaction Document Samples.zip - Thursday June 26, 2025 11:56:48
 - [Requested Exceptions](#) - Attachment 2 - PBI response with redlines_RFP070125_Mailing Postage_Master Agreement.docx - Thursday June 26, 2025 11:54:51
 - [Upload Additional Document](#) - PBI response Sourcewell RFP#070125.pdf - Friday June 27, 2025 12:56:10

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
 - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
 - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
 - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
 1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
 2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
 3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

☒ By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Bill Walter, VP, State and Local Govt., Pitney Bowes Inc.

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

☐ Yes ☐ No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "**I have reviewed this addendum**" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
There have not been any addenda issued for this bid.		