



Invitation for Bids

Project Name: Executive, Employee and Annuitant Trustee Elections – Printed Materials

Date: April 24, 2025

1. The Illinois Municipal Retirement Fund (IMRF) is inviting bids for the products and/or services described in the general specifications, set forth below. Bids should be submitted by written form by email, facsimile, registered mail, certified mail or hand delivery.

2. It is anticipated that the bids will be opened immediately after the submission time and date, and the bids awarded to the successful bidder as indicated in the General Instructions. IMRF reserves the right to award the bid to other than the low (high) bidder or to reject all bids.

3. Illinois law provides that IMRF is not required to hold an election when there is only one certified candidate per open seat. **Should there be only one certified candidate per opening, no election will take place, and the bid award will be terminated. The successful bidder acknowledges this possibility and by submitting its bid consents to immediate termination of any bid or portion of bid awarded upon notice by IMRF that no election will occur.**

4. Please note that these materials will require a quick turnaround time. Artwork to be provided to awarded vendor as follows:

- No later than **September 17, 2025 (Ballot will arrive on September 29, 2025)** for the Executive Election, and all printed ballots and associated materials **must be delivered to the mailer by October 1, 2025.**
- No later than **October 1, 2025** for the Employee and Annuitant Election, and all printed ballots and associated materials **must be delivered to the mailer by October 23, 2025.**

About IMRF

IMRF is a multiple employer agent public employee retirement system providing retirement, survivor, death, and disability benefits to employees of units of local government in Illinois. Created by the Illinois General Assembly, IMRF is governed by the Illinois Pension Code (40 ILCS 5/1-101 et seq.) and is a defined benefit pension plan.

IMRF provides benefits to eligible employees of approximately 3,062 units of government. IMRF has approximately 196,000 active members, 170,000 inactive members, and 160,000 retirees and beneficiaries. We manage assets of approximately \$54 billion and are governed by an eight-member Board of Trustees elected by the employers, active members, and annuitants.

The Board of Trustees makes all benefit decisions and has rule-making authority. Decisions of the Board of Trustees are subject to judicial review under Article III of the Code of Civil Procedure (735 ILCS 3-101 et seq.). IMRF is not an agency of the State of Illinois and is not subject to the Illinois Administrative Procedure Act. IMRF's latest Comprehensive Annual Financial Report and other information about IMRF may be obtained from the website at www.imrf.org.

IMRF's Mission

To efficiently and impartially develop, implement, and administer programs that provide income protection to members and their beneficiaries on behalf of participating employers, in a prudent manner.

IMRF's Vision

To provide the highest quality retirement services to our members, their beneficiaries, and employers.

IMRF's Values

Guiding us to REACH our Mission, Vision, and Goals

Respect
Empathy
Accountability
Accuracy
Courage
Honesty

Baldrige Criteria for Performance Excellence & Illinois Performance Excellence

In our journey towards excellence, IMRF has adopted the Baldrige Criteria framework in order to help us develop and maintain continuous improvement efforts. The Baldrige Criteria outline a set of qualities high-performing organizations possess, in the following seven categories:

1. Leadership
2. Strategy
3. Customers
4. Measurement, analysis, and Improvement of Organizational Performance
5. Workforce
6. Operations
7. Results

Illinois Performance Excellence (ILPEX/IMEC) is a non-profit organization that seeks to help organizations improve their performance by utilizing the Baldrige Criteria for Performance Excellence and aligning their processes to become more efficient and sustainable.

IMRF was proud to be the recipient of the ILPEX Gold Award (representing achievement of excellence) in 2017.

In November 2019 IMRF staff received notice that IMRF is a proud recipient of the Malcolm Baldrige National Quality Award, the first public pension fund in the nation to receive this prestigious award.

Customer Service Principles

In March 2012, IMRF adopted our organizational Customer Service Principles as part of Modernization. The Customer Service Principles apply to everything we do at IMRF. They shape our approach to serving our customers and should guide all day-to-day IMRF operations.

To provide great customer service, IMRF will:

- Establish, manage and communicate expectations, and then follow up.
- Supply timely and accurate information.
- Be simple, fast, and easy for the customer.
- Offer a variety of options.
- Have a global view of the customer.
- Empower staff to resolve problems.

Vendor Expectations

IMRF's Vision and Values and Customer Service Principles help us achieve our goals. We expect our vendors to assist us in achieving these goals by:

- Following our Values.
- Respecting our Customer Service Principles with on-time services and quality products.
- Complying with our ethical bidding process starting with the initial vendor contact through fulfilling contract / order requirements.
- Maintaining a professional work ethic.

Purchasing Diversity Policy

The goal of the IMRF Purchasing Diversity Policy is to promote utilization of businesses owned by minorities, females, and persons with a disability in procurement activities. IMRF encourages its vendors to review the policy, which can be found at www.imrf.org/en/about-imrf/procurement/procurement-diversity-policy.

Code of Conduct Compliance Policy

The IMRF Code of Conduct requires all employees to observe the highest standards of business and personal ethics in the conduct of their duties and responsibilities. IMRF also expects its vendors to comply with our Code and to report violations or suspected violations in accordance with this Code of Conduct Compliance Policy.

Reports of violations or suspected violations can be made via our independent third party provider, Global Compliance Services. If desired, a vendor can submit the report anonymously, via phone or web. IMRF must comply with the Illinois Freedom of Information Act (5 ILCS 140/1 et seq.)

General Instructions

Written bids are required by IMRF for **Executive, Employee, and Annuitant Trustee Elections – Printed Materials 2025** as described in the sections below. The bids should be submitted to IMRF on or before the close of business at **3:30PM CDT on May 15, 2025**. Bids **MUST** include the bid specification cost sheet and a completed Verification of “Minority Owned Business”, “Disabled Owned Business” Or “Woman Owned Business” Status (Exhibit B).

1. Submit to:

Daniel Martinez
Illinois Municipal Retirement Fund
Suite 500, 2211 York Rd.
Oak Brook, IL 60523-2337
630-368-5366
Fax: 630-706-4233
Email: danielmartinez-procurement@imrf.org

2. The bid, to be awarded by June 13, 2025, will be confirmed by a purchase order issued to the successful bidder.
3. The bid will be awarded based on the overall bid; however, prices should be shown for each line item.
4. The equipment must be new and fully eligible for the manufacturer's warranty.

5. Deliveries might have to be broken down. F.O.B. inside delivery, Room 500, 2211 York Road, Oak Brook, IL 60523. Freight should be included in the unit price. Inside delivery to IMRF. Pallets must be broken down and boxes hand-carted to the fifth floor, Room 500.

The building does have a passenger elevator but does not have a freight elevator. Deliveries might have to be broken down so that they can be hand-trucked to the fifth floor. The building dock has the following restrictions:

Height of Truck 14 feet
Length of Truck 40 feet
Size of Deliveries
Not wider than 28ft. and higher than 76 in.
Slope of the ramp is 9 degrees

6. IMRF must comply with the Illinois Freedom of Information Act (5 ILCS 140/1 et seq.) IMRF cannot represent or guarantee that any information submitted in response to this Invitation for Bids will be confidential. If IMRF receives a request for any document submitted in response to the Invitation for Bids, IMRF's sole responsibility will be to notify respondent of a request for such document.

7. IMRF is exempt from State and Local sales and use taxes.

8. IMRF is considered an “instrumentality of Illinois local government.” IMRF is also a registered participant in the State of Illinois Joint Purchasing Program; our registration number is L1074.

9. IMRF has adopted a Diversity Procurement Policy, a copy of which is available from the IMRF Purchasing Coordinator and on the IMRF website (www.imrf.org). The bidder acknowledges receipt of a copy of said policy by signing and submitting a bid sheet to IMRF.

10. The bid shall constitute a binding offer to sell the above-noted product(s) to IMRF and may not be withdrawn once the Board of Trustee of IMRF has awarded the contract to the successful bidder.

11. The bid must be submitted on the IMRF Bid Sheet, which is hereby made an integral part of this document. Include all terms and conditions so the Bid Sheet is a signable contract.

12. Printing vendors must be pre-qualified through the Purchasing Department, before they are eligible to submit a bid. For inquiries, contact Daniel Martinez.

13. IMRF may terminate any bid award, upon thirty (30) days written notice to the successful bidder.

14. Illinois law provides that IMRF is not required to hold an election when there is only one certified candidate per open seat. **Should there be only one certified candidate per opening, no election will take place, and the bid award will be terminated. The successful bidder acknowledges this possibility and by submitting its bid consents to immediate termination of any bid or portion of bid awarded upon notice by IMRF that no election will occur.**

15. IMRF reserves the right to award **separate bids** for the production of election materials and tabulation of ballots.

16. **Questions concerning these bid documents or the IMRF bid process shall be addressed solely to the IMRF Procurement Specialist, Daniel Martinez (contact information on the previous page). IMRF reserves the right to disqualify any bid should any other IMRF staff member be contacted during the bid process without the express written authorization of Mr. Martinez.**

IMRF Printing Specification Cost Sheet

In 2025, the Illinois Municipal Retirement Fund will conduct three Trustee elections: one for three Executive Trustees, one for two Employee Trustees and one for an Annuitant Trustee. This election requires ballots, outgoing envelopes, ballot return envelopes and return mailing envelopes.

To assist you in creating your bid, each product or service associated with the election is presented within the bid document.

The Section Header on the top of each page identifies which bid specs apply to which election.

1. **EXECUTIVE** Trustee (Section 1: pages 5 through 13)
2. **EMPLOYEE** Trustee (Section 2: pages 14 through 17)
3. **ANNUITANT** Trustee (Section 3: pages 18 through 21)
4. **TOTAL COST** for the election (Section 4: page 22)
5. Shipping Information to Advantage Marketing Group (Section 4: page 23)
6. Vendor signatures (page 24)

Notes:

A. No. 9 envelope

Each election uses a No. 9 envelope in the ballot packet. However, the No. 9 used for each election is different. In one case it is a different color, and in the other two cases different text is printed on the outside of the envelope.

B. 6-3/4" remittance envelope

The Employee and Annuitant Trustee election packets include a 6-3/4" remittance envelope to return the ballot.

C. 8-5/8" envelope

The Executive Trustee election packets include an 8-5/8" ballot envelope. Two different ballot envelopes are required, each a different color and each with different text.

D. Shipping to Advantage Marketing Group

All printed material will be shipped to Advantage Marketing Group. Material receiving specifications are provided on page 15.


E. FIM and intelligent mail bar codes for **EMPLOYEE** and **ANNUITANT** ballot envelopes

Vendor may be required to obtain FIM and intelligent mail bar codes for return envelopes; otherwise, IMRF will send artwork to you.

I offer for your acceptance the following bid:

Project: Executive Trustee 2025 election		Paper substitutions allowed?	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes*	Date:	
<input type="checkbox"/>	Print: A. 1 (one) outgoing envelope B. 2 (two) ballot envelopes (one for Governing Bodies, one for Authorized Agents) C. 1 (one) return envelope D. 1 (one) ballot tri-fold for Authorized Agents E. 1 (one) ballot tri-fold for Governing Bodies F. 1 (one) candidate info tri-fold (Both AA and GB) G. 1 (one) ballot resolution for Governing Bodies				

* Paper Substitutions are allowed with approval from IMRF. Must be a similar quality stock. Authorized Agent materials and Governing Body materials need to be clearly different colors than one another, but we are open to other colors if those listed are not readily available.

A. Outgoing Envelope									
Quantity	3,750	Paper Name:	No. 10	Color:	White	Finish:	Wove	Wt:	24#
	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	No.	1	Type:	(See sample art below--not actual size)				
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 30%;">  <p>IMRF Suite 500 2211 York Road Oak Brook IL 60523-2337</p> <p>FORWARDING SERVICE REQUESTED</p> </div> <div style="width: 60%; text-align: center;"> <p><i>Executive Trustee Election ballots enclosed</i></p> </div> <div style="width: 10%; border: 1px solid black; padding: 5px; text-align: center;"> <p>PRESORTED FIRST-CLASS MAIL U.S. POSTAGE PAID ILLINOIS MUNICIPAL RETIREMENT FUND</p> </div> </div>									
Size:	4-1/8" x 9-1/2"		<input checked="" type="checkbox"/> Open Long End <input type="checkbox"/> Open Short end <input type="checkbox"/> Self Seal gum						
Front Ink				Back Ink			plates		
Primary	Second		Third		Primary		Second		
Black	PMS Rubine Red								AB
Bleeds?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		Sides:						
				A. OUTGOING ENVELOPE COST \$					

B. Ballot Envelopes – 3,750 in total									
<u>Backs</u> are different									
B-1 Ballot Envelope No. 1 – “Authorized Agent”									
Quantity		Approximately 2,630							
Paper Name:		No. 8-5/8" **		Color:	Cream	Finish:		Wt:	24#
Size:	3-5/8" x 8-5/8" **			<input checked="" type="checkbox"/> Open Long End			<input type="checkbox"/> Open Short end		<input type="checkbox"/> Self Seal gum
Front Ink				Back Ink				plates	
Primary	Second		Third	Primary	Second		Third		
Black	PMS Rubine Red		none	Black	PMS Rubine Red		none	ab/cd	
Bleeds	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		**Will also accept No. 7 (3 3/4" x 6 3/4") envelopes						
B-2 Ballot Envelope No. 2 – “Governing Body”									
Quantity		Approximately 1,120							
Paper Name:		No. 8-5/8" **		Color:	Light Green	Finish:		Wt:	24#
Size:	3-5/8" x 8-5/8" **			<input checked="" type="checkbox"/> Open Long End			<input type="checkbox"/> Open Short end		<input type="checkbox"/> Self Seal gum
Front Ink				Back Ink				plates	
Primary	Second		Third	Primary	Second		Third		
Black	PMS Rubine Red		none	Black	PMS Rubine Red		none	ab/cd	
Bleeds	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		**Will also accept No. 7 (3 3/4" x 6 3/4") envelopes						
B. BALLOT ENVELOPE COST \$									

C. Return Envelope									
Quantity:	Approx. 3,750	Paper Name:	No. 9	Color:	Tan	Finish:	Wove	Wt:	24#
Die Cut(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		No.	n/a	Type:				
Size:	3-7/8" x 8-7/8"			<input checked="" type="checkbox"/> Open Long End			<input type="checkbox"/> Open Short end		<input type="checkbox"/> Self Seal gum
Front Ink					Back Ink			plates	
Primary		Second		Third	Primary		Second		
Black								a/	
Bleeds?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		Sides:						
C. RETURN ENVELOPE COST \$									

D. BALLOT TRI-FOLD FOR AUTHORIZED AGENTS									
Quantity	2,630	Paper Name:	Springhill Opaque	Color:	White	Finish:	Offset	Wt:	70#
Finished Size:	3-1/2" x 7"		Flat Size:	10.5x7 Please note: Ballot consists of 3 Ballots on the front., one on each panel with instructions on the back					
Bleeds:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
Fold(s):	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes		No.:	2	Type:	brochure (tri) fold			
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			Position:	<input type="checkbox"/> Left <input checked="" type="checkbox"/> Right <input type="checkbox"/> Center <input type="checkbox"/> Left & Right				
Front Ink : 4 Color (CMYK)					Back Ink: 4 Color (CMYK)				
Blends?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
D. BALLOT TRI-FOLD FOR AUTHORIZED AGENTS COST \$									

E. BALLOT TRI-FOLD FOR GOVERNING BODIES									
Quantity	2,630	Paper Name:	Springhill Opaque	Color:	White	Finish:	Offset	Wt:	70#
Finished Size:	3-1/2" x 7"		Flat Size:	10.5x7 Please note: Ballot consists of 3 Ballots on the front., one on each panel with instructions on the back					
Bleeds:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
Fold(s):	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes		No.:	2	Type:	brochure (tri) fold			
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			Position:	<input type="checkbox"/> Left <input checked="" type="checkbox"/> Right <input type="checkbox"/> Center <input type="checkbox"/> Left & Right				
Front Ink : 4 Color (CMYK)					Back Ink: 4 Color (CMYK)				
Blends?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
E. BALLOT TRI-FOLD FOR GOVERNING BODIES COST \$									

F. CANIDATE INFO TRI-FOLD (BOTH AA AND GB)									
Quantity	3,750	Paper Name:	Springhill Opaque	Color:	White	Finish:	Offset	Wt:	70#
Finished Size:	3-1/2" x 7"		Flat Size:	10.5x7 Please note: This will include candidate bios.					
Bleeds:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
Fold(s):	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes		No.:	2	Type:	brochure (tri) fold			
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			Position:	<input type="checkbox"/> Left <input checked="" type="checkbox"/> Right <input type="checkbox"/> Center <input type="checkbox"/> Left & Right				
Front Ink : 4 Color (CMYK)					Back Ink: 4 Color (CMYK)				
Blends?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
F. CANIDATE INFO TRI-FOLD (BOTH AA AND GB) COST \$									

G. Ballot Resolution for Governing Bodies									
Quantity	1,120	Paper Name:	Springhill Opaque	Color:	Canary (Yellow)	Finish:	Offset	Wt:	70#
Finished Size:	3-1/3" x 8-1/2"		Flat Size:	8-1/2" x 10"					
Bleeds:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
Fold(s):	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes		No.:	2	Type:	C fold (letter fold to fit into 8-5/8" envelope)			
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right <input type="checkbox"/> Center <input type="checkbox"/> Left & Right				
Front Ink					Back Ink		plates		
Primary	Second		Third	Primary	Second				
Black	Cool gray ("Artificial Watermark" in cool gray ink on face of ballot. Vendor may quote some other anti-counterfeit measure, such as an "invisible" screen that appears only when ballot is photocopied.)		none	none	none	ab			
Multi-Ink Blends?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
G. BALLOT RESOLUTION FOR GOVERNING BODIES COST \$									

Composition/Artwork/Proof			
Art Format Supplied:	<input checked="" type="checkbox"/> Disk/CD or <input checked="" type="checkbox"/> File upload to Vendor site (if available) <input type="checkbox"/> Camera Ready <input type="checkbox"/> Film	Program/Version:	InDesign CC
Proof Type:	<input type="checkbox"/> Color Key <input checked="" type="checkbox"/> Color Laser <input type="checkbox"/> On-site Approval <input type="checkbox"/> Other _____		
Platform:	<input checked="" type="checkbox"/> PC <input type="checkbox"/> Macintosh	PROOFS COST \$	

Bindery/Finishing							
Fold(s):	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	No.:		Type:	See pages 8-11 D. Ballot tri-fold for Authorized Agents E. Ballot tri-fold for Governing Bodies F. Candidate info tri-fold (Both AA and GB) G. Ballot resolution for Governing Bodies		
Score(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Die Cut(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:	1	Type:			
Punch:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Numbering:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	# of places:			Color:		Type:
Crimp:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right <input type="checkbox"/> Center		
Missing #s:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes; List _____						
Perf:	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes See page 7 D. Ballot Brochure for Authorized Agents			Position:	<input type="checkbox"/> Left <input checked="" type="checkbox"/> Right <input type="checkbox"/> Center <input type="checkbox"/> Left & Right		
Line Glue:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right		
Wafer Seal:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			

Packaging

Type Required:	<input checked="" type="checkbox"/> Convenient Cartons	Special Handling:	
	<input type="checkbox"/> Shrinkwrap		

	PACKAGING COST	\$
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Delivery

FOB Point:

IMRF*	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Quantity:	
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Advantage Marketing Group**	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Quantity:	ALL
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[illegible]

Delivery Date Required:	No later than October 1, 2025.	DELIVERY COST	\$
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<p>*IMRF</p> <p>Inside delivery to IMRF, Room 500, 2211 York Road, Oak Brook, IL 60523.</p> <p>Freight should be included in the unit price.</p> <p>Pallets must be broken down and boxes hand carted to fifth floor, Room 500.</p> <p>The building does not have a freight elevator and deliveries must be hand-trucked to the fifth floor. <u>The building dock has the following restrictions:</u></p> <p>Height of Truck 14 feet</p> <p>Length of Truck 40 feet</p> <p>Size of Deliveries..... Max width is 28 feet</p> <p>..... Max height is 76 feet</p> <p>Slope of the Loading Dock 9 degrees</p>	<p>** Advantage Marketing Group</p> <p>See page 22 for address and material receiving specifications.</p>
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TOTAL EXECUTIVE ELECTION BID \$_____

I offer for your acceptance the following bid:

Project: Employee Trustee 2025 Election	Quantity:	Approx. 200,000	Date:	
<input type="checkbox"/> Print: A. 1 (one) outgoing envelope B. 1 (one) return envelope C. 1 (one) ballot <input type="checkbox"/> FIM and intelligent mail bar codes for EMPLOYEE ballot envelopes	Paper substitutions allowed?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		

A. EMPLOYEE Outgoing Envelope									
Quantity	Approx. 200,000	Paper Name:	No. 9	Color:	White	Finish:	Wove	Wt:	24#
Size:	3-7/8" x 8-7/8"			<input checked="" type="checkbox"/> Open Long End <input type="checkbox"/> Open Short end <input type="checkbox"/> Self Seal gum					
Front Ink						Back Ink			
Primary		Second		Third		Primary		Second	
Black		PMS Rubine Red						plates	
Bleeds?		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		Sides:				A. OUTGOING ENVELOPE COST \$	

B. EMPLOYEE Mailing Return Envelope									
Quantity:	Approx. 200,000	Paper Name:	6-3/4" remittance	Color:	Violet (orchid)	Finish:	Wove	Wt:	24#
Die Cut(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
Size:	3-5/8" x 6-1/2"			<input checked="" type="checkbox"/> Open Long End <input type="checkbox"/> Open Short end <input type="checkbox"/> Self Seal gum					
Style:	Open side remittance			Gum – Regular (remoist)					
Flap Style:	Remittance (3-3/8"square)			Seam – Side seam constructed					
Front Ink						Back Ink			
Primary		Second		Third		Primary		Second	
Black		PMS Rubine Red				Black		PMS Rubine Red	
Bleeds?		<input checked="" type="checkbox"/> No Yes <input type="checkbox"/>		Sides:				plates	
<p>Vendor must supply 15 test samples of the return envelope before printing. These samples are necessary to verify IMRF's QBRM eligibility which allows IMRF to receive a discounted postal rate from the post office for the returning ballot envelopes.</p>									
						B. RETURN ENVELOPE COST \$			

C. EMPLOYEE Trustee Ballot										
Quantity	Approx.. 200,000	Paper Name:	Springhill Opaque	Color:	Violet (Orchid)	Finish:	Offset	Wt:	60#	
Finished Size:	3-3/8" x 6-1/4"		Flat Size:	3-3/8" x 6-1/4"						
Bleeds:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes									
Fold(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes									
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes									
Front Ink						Back Ink		plates		
Primary		Second		Third		Primary				Second
Black		Rubine Red		Cool Gray ("Artificial Watermark" in cool gray ink on face of ballot. Vendor may quote some other anti- counterfeit measure, such as an "invisible" screen that appears only when ballot is photocopied.)		Black		Rubine Red		abc/de
Multi-Ink Blends?		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
C. EMPLOYEE BALLOT COST \$ _____										

Composition/Artwork/Proof			
Art Format Supplied:	<input type="checkbox"/> Disk/CD or <input checked="" type="checkbox"/> File upload to Vendor site (if available) <input type="checkbox"/> Camera Ready <input type="checkbox"/> Film	Program/Version:	InDesign CC
Proof Type:	<input type="checkbox"/> Color Key <input checked="" type="checkbox"/> Color Laser <input type="checkbox"/> On-site Approval <input type="checkbox"/> Other _____		
Platform:	<input checked="" type="checkbox"/> PC <input type="checkbox"/> Macintosh	PROOFS COST \$	

Bindery/Finishing							
Fold(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Score(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Die Cut(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Punch:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Numbering:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	# of places:		Color:		Type:	
Crimp:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right <input type="checkbox"/> Center				
Missing #s:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes; List _____						
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right <input type="checkbox"/> Center <input type="checkbox"/> Left & Right				
Line Glue:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right				
Wafer Seal:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			

Packaging

Type Required:	<input checked="" type="checkbox"/> Convenient Cartons <input type="checkbox"/> Shrinkwrap	Special Handling:	
		PACKAGING COST	\$

Delivery

FOB Point:

IMRF*	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Quantity:	
Advantage Marketing Group**	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Quantity:	ALL

Delivery Date Required:

No later than
October 23,
2025**DELIVERY COST** \$***IMRF**

Inside delivery to IMRF, Room 500, 2211 York Road, Oak Brook, IL 60523.

Freight should be included in the unit price.

Pallets must be broken down and boxes hand carted to fifth floor, Room 500.

The building does not have a freight elevator and deliveries must be hand-trucked to the fifth floor. The building dock has the following restrictions:

Height of Truck **14 feet**
Length of Truck **40 feet**
Size of Deliveries..... **Max width is 28 feet**
..... **Max height is 76 feet**
Slope of the Loading Dock **9 degrees**

****Advantage Marketing Group**

See page 22 for address and material receiving specifications.

TOTAL EMPLOYEE ELECTION BID \$ _____

I offer for your acceptance the following bid:

Project: Annuitant Trustee 2025 Election	Quantity:	Approx. 160,000	Date:	
<input type="checkbox"/> Print: A. 1 (one) outgoing envelope B. 1 (one) return envelope C. 1 (one) ballot <input type="checkbox"/> FIM and intelligent mail bar codes for ANNUITANT ballot envelopes	Paper substitutions allowed?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		

A. ANNUITANT Outgoing Envelope									
Quantity	Approx. 160,000	Paper Name:	No. 9	Color:	White	Finish:	Wove	Wt:	24#
Size:	3-7/8" x 8-7/8"			<input checked="" type="checkbox"/> Open Long End <input type="checkbox"/> Open Short end <input type="checkbox"/> Self Seal gum					
Front Ink						Back Ink			
Primary		Second		Third		Primary		Second	
Black		PMS Rubine Red						plates	
Bleeds?		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		Sides:				A. OUTGOING ENVELOPE COST \$	

B. ANNUITANT Mailing Return Envelope									
Quantity:	Approx. 160,000	Paper Name:	6-3/4" remittance	Color:	Grey	Finish:	Wove	Wt:	24#
Die Cut(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
Size:	3-5/8" x 6-1/2"			<input checked="" type="checkbox"/> Open Long End <input type="checkbox"/> Open Short end <input type="checkbox"/> Self Seal gum					
Style:	Open side remittance			Gum – Regular (remoist)					
Flap Style:	Remittance (3-3/8"square)			Seam – Side seam constructed					
Front Ink						Back Ink			
Primary		Second		Third		Primary		Second	
Black		PMS Rubine Red				Black		PMS Rubine Red	
Bleeds?		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		Sides:				plates	
<p>Vendor must supply 15 test samples of the return envelope before printing. These samples are necessary to verify IMRF's QBRM eligibility which allows IMRF to receive a discounted postal rate from the post office for the returning ballot envelopes.</p>									
						B. RETURN ENVELOPE COST \$			

C. ANNUITANT Trustee Ballot										
Quantity	Approx.. 160,000	Paper Name:	Springhill Opaque	Color:	Grey	Finish:	Offset	Wt:	60#	
Finished Size:	3-3/8" x 6-1/4"		Flat Size:	3-3/8" x 6-1/4"						
Bleeds:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes									
Fold(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes									
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes									
Front Ink						Back Ink		plates		
Primary		Second		Third		Primary				Second
Black		Rubine Red		Opaque White (“Artificial Watermark” in cool gray ink on face of ballot. Vendor may quote some other anti- counterfeit measure, such as an “invisible” screen that appears only when ballot is photocopied.)		Black		Rubine Red		abc/de
Multi-Ink Blends?		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes								
C. ANNUITANT BALLOT COST \$ _____										

Composition/Artwork/Proof			
Art Format Supplied:	<input type="checkbox"/> Disk/CD or <input checked="" type="checkbox"/> File upload to Vendor site (if available) <input type="checkbox"/> Camera Ready <input type="checkbox"/> Film	Program/Version:	InDesign CC
Proof Type:	<input type="checkbox"/> Color Key <input checked="" type="checkbox"/> Color Laser <input type="checkbox"/> On-site Approval <input type="checkbox"/> Other _____		
Platform:	<input checked="" type="checkbox"/> PC <input type="checkbox"/> Macintosh	PROOFS COST \$	

Bindery/Finishing							
Fold(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Score(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Die Cut(s):	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Punch:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			
Numbering:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	# of places:		Color:		Type:	
Crimp:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right <input type="checkbox"/> Center				
Missing #s:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes; List _____						
Perf:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right <input type="checkbox"/> Center <input type="checkbox"/> Left & Right				
Line Glue:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Position:	<input type="checkbox"/> Left <input type="checkbox"/> Right				
Wafer Seal:	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	No.:		Type:			

Packaging			
Type Required:	<input checked="" type="checkbox"/> Convenient Cartons <input type="checkbox"/> Shrinkwrap	Special Handling:	
		PACKAGING COST	\$

Delivery			
FOB Point:			
IMRF*	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	Quantity:	
Advantage Marketing Group**	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Quantity:	ALL
Delivery Date Required:	No later than October 23, 2025	DELIVERY COST	\$
*IMRF Inside delivery to IMRF, Room 500, 2211 York Road, Oak Brook, IL 60523. Freight should be included in the unit price. Pallets must be broken down and boxes hand carted to fifth floor, Room 500. The building does not have a freight elevator and deliveries must be hand-trucked to the fifth floor. <u>The building dock has the following restrictions:</u> Height of Truck 14 feet Length of Truck 40 feet Size of Deliveries Max width is 28 feet Max height is 76 feet Slope of the Loading Dock 9 degrees		**Advantage Marketing Group See page 22 for address and material receiving specifications.	

TOTAL ANNUITANT ELECTION BID \$ _____

Total cost of all three elections:

TOTAL EXECUTIVE ELECTION BID \$ _____

TOTAL EMPLOYEE ELECTION BID \$ _____

TOTAL ANNUITANT ELECTION BID \$ _____

**GRAND TOTAL FOR
ALL THREE ELECTIONS** \$ _____

ADVANTAGE MARKETING GROUP - MATERIAL RECEIVING SPECIFICATIONS		
CARTONS	All material must be packed in cartons. Size should conform as closely as possible to the contents. Skid cartons are acceptable for letters, buckslips, brochures, self-mailers, and components that skid cartons will not damage banded material.	
	Test Strength	200 Pounds (minimum) (for cartons)
	Gross Weight	Not to exceed 50 pounds (for cartons)
	Identifications	Each carton (skid carton) must be identified on the outside with material name, version name, code and quantity per carton. Please attach a sample of the component to the outside of the carton (skid carton). DO NOT MIX CODES/VERSIONS WITHIN CARTONS
PALLETS	All material must be on pallets, slip-sheeted or bed loaded trailers will not be accepted. 48" x 40" wooden pallets should be used.	
	Dimensions	Not to exceed 48" in length. Open side (fork side) must have a dimension of 48". Height must not exceed 52" including pallet.
	Weight	Not to exceed 2,000 pounds.
	Securing Load	Material must be secured to pallet in a manner such as to inhibit shifting and crushing of contents. Banding with metal or plastic, stretch wrapping and shrink-wrapping are acceptable methods.
	Identification	<p>A packing list must accompany each shipment outlining the following minimal information:</p> <ol style="list-style-type: none"> 1. Material name 2. Number of cartons by version name or code 3. Number of pieces by version name or code 4. Customer job number 5. Total number of skids, with a separate line showing the number of mixed skids included in the total. <p><i>PLEASE FAX THE PACKING LIST, PRIOR TO SHIPPING, TO 847-952-3348</i></p> <p>This will enable us to be fully prepared to receive your material.</p>
RECEIVING HOURS	<p>Materials will only be accepted Monday through Friday, 7:30 AM – 5 PM. Special arrangements must be made with Receiving for any deliveries outside of these hours.</p> <p>SHIPMENTS WITHOUT PROPER PAPER WORK WILL BE REFUSED.</p>	
SHIPPING ADDRESS	1185 Jansen Farm Ct. Elgin, IL 60123	847-952-2100 847-952-3348 Fax

I acknowledge receipt of a current copy of the IMRF Diversity Procurement Policy ("Policy"). I understand that IMRF will typically award a bid to the lowest cost bidder. However, in order to meet the goals set forth in the Policy, a bid may be awarded to a vendor, other than the low bidder.

I certify that I have completed the IMRF Diversity Business Verification Form and I have attached a completed copy of said form to this bid.

I further understand and acknowledge that a fraudulent certification as to MWDBE status shall: 1) constitute grounds for the immediate termination of any bid award; 2) prohibit my participation in any further IMRF Invitation for Bids; and 3) may result in criminal prosecution to the fullest extent permitted by state and/or federal law.

Finally, I understand that, upon acceptance of this offer by the IMRF Board of Trustees, this offer and related documentation, and the request for bid shall become a binding contract. I agree that any negligence on my part in preparing this bid confers no right to withdraw the offer after it has been accepted by the IMRF Board of Trustees.

Company Name: _____

Authorized Signature: _____ Date: _____

Title: _____

IMRF Procurement Approval:

Authorized Signature: _____ Date: _____

Title: _____

IMRF Legal Approval:

Authorized Signature: _____ Date: _____

Title: _____

IMRF Final Approval:

Authorized Signature: _____ Date: _____

Title: _____

Exhibit A - IMRF

Terms and Conditions

RFP/ BID

IMRF's Request for Proposal (RFP), Invitation for Bids, or any similar document soliciting contractors for the work set forth herein, and Contractor's response thereto, are hereby incorporated by reference into this Agreement as though fully set forth herein. To the extent that there are any conflicts between the RFP or bid document and this Agreement, this Agreement shall prevail.

Code of Conduct

Contractor will comply with all applicable provisions of the IMRF Code of Conduct, a copy of which can be found at www.imrf.org/vendor-code-conduct

Termination of Contract

This Agreement may be terminated at any time by the mutual consent of IMRF and Contractor. Either party may, without the consent of the other party, terminate this Agreement upon 60 days' prior written notice to the other party. Upon early termination, Contractor shall be entitled to payment for satisfactory supplies, equipment and/or services provided as of the date of receipt of notice of termination and with adequate documentation.

Successors and Assigns

The terms of this Agreement will be binding upon and inure to the benefit of the parties and their respective successors and assigns; provided, however, that neither party will assign this Agreement in whole or in part without the prior written approval of the other.

Amendment

Amendments to this Agreement must be made in writing and signed by all parties. If an amendment causes an increase in the Contractor's costs or in the time required for performance, the Agreement may be modified accordingly. Nothing in this clause shall excuse the Contractor from performing.

Severability

If any provisions of this Agreement are held to contravene or be invalid under the laws of any state or jurisdiction, contravention will not invalidate the entire Agreement, but it will be construed as if not containing the invalid provision and the rights or obligations of the parties will be construed and enforced accordingly.

Standard of Care

Services performed by Contractor under this Agreement will be conducted in a manner consistent with that level of care and skill ordinarily exercised by members of the profession currently practicing in the same locality under similar conditions. If the Contractor fails to meet the foregoing standard, Contractor will perform at its own cost, and without reimbursement from IMRF, the professional services necessary to correct errors and omissions caused by Contractor's failure to comply with the above standard and reported to Contractor within one (1) year from the completion of Contractor's services under this Agreement.

Unavoidable Delay

If the Contractor is delayed in the delivery of goods or services purchased under this Agreement by a cause beyond its control, the Contractor must, as soon as it knows of the delay, give written notice to IMRF and request an extension of time for performance. IMRF shall examine the request and determine if such an extension is to be granted. IMRF is under no obligation to grant such an extension.

Performance

Contractor agrees that IMRF shall be the sole judge as to whether work performed under this Agreement has been satisfactory. Any goods furnished shall be received subject to IMRF's inspection and right of rejection.

Relationship between IMRF and the Contractor

Contractor is an independent contractor in the performance of this Agreement, and is not an agent, employee, partner, or in joint venture with IMRF.

Warranties

In addition to all warranties provided by law, Contractor warrants that the services, supplies and/or equipment furnished under this Agreement: (i) will conform to drawings, plans, specifications, samples or other descriptions furnished, specified, accepted, or approved by IMRF, including but not limited to all specifications attached as exhibits to this Agreement; (ii) will be merchantable, of good quality in manufacture and workmanship, free from defects for a period of twelve months or longer if specified in writing, and fit and sufficient for the intended use; (iii) will comply with all federal and state laws, regulations, and ordinances pertaining to the manufacturing, packing, labeling, sale and delivery of such goods; (iv) will be of good title and be free and clear of all liens and encumbrances; and (v) will not infringe any patent, copyright, or other intellectual or proprietary rights of any third party. Contractor agrees to reimburse IMRF for any losses, costs, damages, or expenses, including without limitation, reasonable attorney fees and expenses, arising from failure of such goods to meet such warranties. These warranties shall be in addition to all other warranties, express, implied, or statutory, shall survive IMRF's payment, acceptance, inspection, or failure to inspect such goods.

Waiver

Except as specifically waived in writing, failure by either party to exercise or enforce a right or obligation under this

Agreement shall not affect any subsequent ability to exercise or enforce a right or obligation and will not be construed to be a waiver of any provision except for the particular instance.

Confidential Data and Information

Contractor, including its personnel, agents, and subcontractors, may have access to, collect, or receive confidential data, member records, or other information owned or maintained by IMRF in the course of carrying out its responsibilities under this Agreement. IMRF hereby designates all information received or accessed pursuant to this Agreement as confidential unless otherwise stated in writing. Contractor shall not unnecessarily communicate such data or information within Contractor's operations. No such data or information shall be disclosed or disseminated except as authorized by law and with the written consent of IMRF, either during the period of this Agreement or thereafter. Contractor must return all such data and information, in whatever form it is maintained, promptly at the end of the Agreement or earlier at the request of IMRF, or shall notify IMRF in writing of its destruction.

Security Breach Procedures

For purposes of this contract, "Security Breach" means any act or omission that compromises either the security, confidentiality, availability, or integrity of personal data or the physical, technical, administrative or organizational safeguards put in place by Contractor that relate to the protection of the security, confidentiality, or integrity of personal data. Without limiting the foregoing, a compromise shall include any unauthorized access to or disclosure or acquisition of personal data.

Contractor shall notify IMRF of a Security Breach as soon as practicable, but not later than twenty-four (24) hours after Contract has become aware of it. Contractor shall notify IMRF of any Security Breaches by telephone and email to Contractor's primary business contact with IMRF. Immediately following Contractor's notification to IMRF of a Security Breach, the parties shall coordinate with each other to investigate the Security Breach. Contractor agrees to fully cooperate with IMRF in IMRF's handling of the matter, including, without limitation (i) assisting with any investigation; (ii) providing IMRF with physical access to the facilities and operations affected; (iii) facilitating interviews with Contractor's employees and others involved in the matter; and (iv) making available all relevant records, logs, files, data reporting, and other materials required to comply with applicable law, regulation, industry standards, or as otherwise required by IMRF.

Open Records/Open Meetings

Contractor acknowledges that IMRF and this Agreement are subject to the provisions of the Illinois Open Meetings Act (5 ILCS 120/1 *et seq.*) and the Illinois Freedom of Information Act (5 ILCS 140/1 *et seq.*)

Applicable Law

This Agreement and Contractor's obligations and services hereunder are made and must be performed in compliance with all applicable federal and state laws. This Agreement shall be construed and governed in accordance with the laws of the State of Illinois to the extent that such laws are not pre-empted by the laws of the United States of America. By entering into this Agreement, Contractor agrees to submit to the exclusive jurisdiction of the state and federal courts of Illinois and agrees that any action or proceeding against IMRF arising out of or in connection with this Agreement shall be instituted in the Circuit Court of DuPage County or the US District Court for the Northern District of Illinois. IMRF may agree to arbitration or other alternative dispute resolution at its sole discretion.

Indemnity and Hold Harmless Agreement

To the fullest extent permitted by law, the Contractor shall indemnify, keep and save harmless IMRF and its

trustees, agents, and employees against all losses, damages, claims, suits, liabilities, judgments, costs and expenses arising out of (a) any breach or violation by Contractor of any of its representations, warranties, covenants, or agreements set forth herein, (b) any actual or alleged death or injury to any person, damage to any property, or any other damage or loss by whomsoever suffered, claimed to have resulted in whole or in part from performance hereunder, (c) any act, activity, or omission of Contractor or any of its employees, representatives, subcontractors, or agents, which may arise directly or indirectly from any negligence or from the reckless or willful misconduct of the Contractor, its employees, or its subcontractors, and the Contractor shall at its own expense, appear, defend and pay all charges of attorneys and all costs and other expenses arising therefrom or incurred in connection therewith, and, if any judgment shall be rendered against IMRF in any such action, the Contractor shall, at its own expense, satisfy and discharge the same. This Agreement shall not be construed as requiring the Contractor to indemnify IMRF for IMRF's own negligence.

Nondiscrimination / Equal Employment Opportunity

Contractor will comply with applicable provisions of the State and Federal constitutions, laws, and regulations pertaining to unlawful discrimination, harassment, and equal employment opportunity, including but not limited to the U.S. Civil Rights Act, Section 504 of the Federal Rehabilitation Act, the Americans with Disabilities Act, and the Illinois Human Rights Act. 42 USC 12101 *et seq.*, 775 ILCS 5, 775 ILCS 10.

Employment of IMRF Employees

Contractor agrees to notify IMRF if it solicits or intends to solicit for employment any of the employees of IMRF during the term of the Agreement.

Insurance

Contractor shall, at its sole cost and expense, procure and maintain in full force and effect during the term of this Agreement, a Certificate of Insurance naming IMRF an additional insured for all required bonds and insurance. Certificates may not be modified or canceled until at least 30 days' notice has been provided to IMRF. Contractor shall provide in the following minimum amounts: (a) General Commercial Liability-occurrence form in the amount of \$1,000,000 per occurrence (Combined Single Limit Bodily Injury and Property Damage) and \$2,000,000 Annual Aggregate; (b) Auto Liability, including Hired Auto and Non-owned Auto, in the amount of \$1,000,000 per occurrence (Combined Single Limit Bodily Injury and Property Damage); and (c) Worker's Compensation Insurance in the amount required by law. Insurance shall not limit Contractor's obligation to indemnify, defend, or settle any claims. Contracts that include contractor-provided delivery to IMRF's Oak Brook office require a separate certificate of insurance for the building. IMRF will provide the necessary information.

Payment Procedures

Contractor shall accept electronic payments by credit card and/or Automated Clearing House (ACH) payments. IMRF will comply with the Local Government Prompt Payment Act, 50 ILCS 505/1 *et seq.*, in that any bill approved for payment must be paid or the payment issued to the Contractor within 60 days of receipt of a proper bill or invoice. If payment is not issued to the Contractor within this 60 day period, an interest penalty of 1.0% of any amount approved and unpaid shall be added for each month or fraction thereof after the end of this 60 day period, until final payment is made.

Exhibit B

VERIFICATION OF “MINORITY OWNED BUSINESS”, “DISABLED OWNED BUSINESS” or “WOMAN OWNED BUSINESS” STATUS

_____ verifies that it DOES / DOES NOT meet
(Firm Name)
the requirements to be classified as a “**Minority Owned Business**” as defined in Illinois Statute
30-ILCS-575/2 Business Enterprise for Minorities, Women, and Persons with Disabilities Act.
(Excluding the statutory maximum of 75 million in gross annual sales)

_____ verifies that it DOES / DOES NOT meet
(Firm Name)
the requirements to be classified as a “**Female Owned Business**” as defined in Illinois Statute
30-ILCS-575/2 Business Enterprise for Minorities, Women, and Persons with Disabilities Act.
(Excluding the statutory maximum of 75 million in gross annual sales)

_____ verifies that it DOES / DOES NOT meet
(Firm Name)
the requirements to be classified as a “**Disabled Owned Business**” as defined in Illinois Statute
30-ILCS-575/2 Business Enterprise for Minorities, Women, and Persons with Disabilities Act.
(Excluding the statutory maximum of 75 million in gross annual sales)

_____ verifies that its gross annual sales for the
(Firm Name)
last fiscal year DID / DID NOT exceed \$75,000,000 in as evidenced by its annual federal
tax return.

_____ verifies that it IS / IS NOT a publicly held/traded firm.
(Firm Name)

Signature

Title

Date

Pertinent definitions from Section 2 of the Business Enterprise for Minorities, Women and Persons with Disabilities Act (30 ILCS 575/2):

(A) For the purpose of this Act, the following terms shall have the following definitions:

(1) "Minority person" shall mean a person who is a citizen or lawful permanent resident of the United States and who is any of the following:

(a) American Indian or Alaska Native (a person having origins in any of the original peoples of North and South America, including Central America, and who maintains tribal affiliation or community attachment).

(b) Asian (a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, but not limited to, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam).

(c) Black or African American (a person having origins in any of the black racial groups of Africa). Terms such as "Haitian" or "Negro" can be used in addition to "Black or African American".

(d) Hispanic or Latino (a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race).

(e) Native Hawaiian or Other Pacific Islander (a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands).

(2) "Female" shall mean a person who is a citizen or lawful permanent resident of the United States and who is of the female gender.

(2.05) "Person with a disability" means a person who is a citizen or lawful resident of the United States and is a person qualifying as a person with a disability under subdivision (2.1) of this subsection (A).

(2.1) "Person with a disability" means a person with a severe physical or mental disability that:

- | | |
|-------------------|--|
| (a) results from: | hemophilia, |
| amputation, | respiratory or pulmonary dysfunction, |
| arthritis, | an intellectual disability, |
| autism, | mental illness, |
| blindness, | multiple sclerosis, |
| burn injury, | muscular dystrophy, |
| cancer, | musculoskeletal disorders, |
| cerebral palsy, | neurological disorders, including stroke and epilepsy, |
| Crohn's disease, | paraplegia, |
| cystic fibrosis, | quadriplegia and other spinal cord conditions, |
| deafness, | sickle cell anemia, |
| head injury, | ulcerative colitis, |
| heart disease, | specific learning disabilities, or |
| hemiplegia, | end stage renal failure disease; and |

(b) substantially limits one or more of the person's major life activities.

Another disability or combination of disabilities may also be considered as a severe disability for the purposes of item (a) of this subdivision (2.1) if it is determined by an evaluation of rehabilitation potential to cause a comparable degree of substantial functional limitation similar to the specific list of disabilities listed in item (a) of this subdivision (2.1).

(3) "Minority owned business" means a business concern which is at least 51% owned by one or more minority persons, or in the case of a corporation, at least 51% of the stock in which is owned by one or more minority persons; and the management and daily business operations of which are controlled by one or more of the minority individuals who own it.

(4) "Female owned business" means a business concern which is at least 51% owned by one or more women, or, in the case of a corporation, at least 51% of the stock in which is owned by one or more women; and the management and daily business operations of which are controlled by one or more of the women who own it.

(4.1) "Business owned by a person with a disability" means a business concern that is at least 51% owned by one or more persons with a disability and the management and daily business operations of which are controlled by one or more of the persons with disabilities who own it. A not-for-profit agency for persons with disabilities that is exempt from taxation under Section 501 of the Internal Revenue Code of 1986 is also considered a "business owned by a person with a disability".

(4.2) "Council" means the Business Enterprise Council for Minorities, Women, and Persons with Disabilities created under Section 5 of this Act.

(8) "Certification" means a determination made by the Council or by one delegated authority from the Council to make certifications or by a State agency with statutory authority to make such a certification, that a business entity is a business owned by a minority, female, or person with a disability for whatever purpose. A business owned and controlled by women shall be certified as a "female owned business". A business owned and controlled by women who are also minorities shall be certified as both a "female owned business" and a "minority owned business".

(9) "Control" means the exclusive or ultimate and sole control of the business including, but not limited to, capital investment and all other financial matters, property, acquisitions, contract negotiations, legal matters, officer-director-employee selection and comprehensive hiring, operating responsibilities, cost-control matters, income and dividend matters, financial transactions and rights of other shareholders or joint partners. Control shall be real, substantial and continuing, not pro forma. Control shall include the power to direct or cause the direction of the management and policies of the business and to make the day-to-day as well as major decisions in matters of policy, management and operations. Control shall be exemplified by possessing the requisite knowledge and expertise to run the particular business and control shall not include simple majority or absentee ownership.

(10) "Business concern or business" means a business that has annual gross sales of less than \$75,000,000 as evidenced by the federal income tax return of the business. A firm with gross sales in excess of this cap may apply to the Council for certification for a particular contract if the firm can demonstrate that the contract would have significant impact on businesses owned by minorities, women, or persons with disabilities as suppliers or subcontractors or in employment of minorities, women, or persons with disabilities.

(B) When a business concern is owned at least 51% by any combination of minority persons, women, or persons with disabilities, even though none of the 3 classes alone holds at least a 51% interest, the ownership requirement for purposes of this Act is considered to be met. The certification category for the business is that of the class holding the largest ownership interest in the business. If 2 or more classes have equal ownership interests, the certification category shall be determined by the business concern.

(Source: P.A. 98-95, eff. 7-17-13; 99-143, eff. 7-27-15.)