

# OFFICE OF STATE PROCUREMENT PRINTING DELEGATION ORDER MANUAL

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# ARKANSAS CONSTITUTION, AMENDMENT 54

The printing, stationery, and supplies purchased by the General Assembly and other departments of government shall be under contracts given to the lowest responsible bidder, below such maximum price and under such regulations as shall be prescribed by law. No member or officer of any department of government shall in any way be interested in such contracts.

# **EXCLUSIVE JURISDICTION OVER PROCUREMENT- §19-11-222**

Per Arkansas Code Annotated 19-11-222, The State Procurement Director has exclusive jurisdiction over the procurement of items subject to Arkansas Constitution, Amendment 54. The commodities subject to Amendment 54 are printing, stationery, and supplies. This means printing purchases are subject to different purchasing thresholds and requirements than other types of commodities and services.

Arkansas Code Annotated 19-11-222 defines printing as the process of transferring images, by the use of standard industrial type printer ink, upon documents such as letterhead, envelopes, pamphlets, booklets, and forms. Stationery is imprinted letterhead and envelopes used by the General Assembly and other departments of state government to identify an individual department, agency, board, commission, etc.; and supplies means paper and inks used to produce stationery.

No agencies are exempt from these requirements.

#### PROGRAM OUTLINE AND REQUIREMENTS

#### **Purpose of Delegation Orders**

To streamline the procurement process and make it as responsive to agencies as possible while ensuring compliance with Arkansas Procurement law and Regulations, the State Procurement Director may delegate authority to conduct printing procurements to agency personnel.

Printing Delegation Orders (PDOs) are issued to individuals. An agency is required to have at least one authorized printing delegate in order to purchase printing.

# **Obtaining a Printing Delegation**

Agencies interested in obtaining a printing delegation for an individual within their agency will:

- ➤ Notify OSP Training at <u>osp.training@arkansas.gov</u> that the individual will be participating in printing delegation training.
- Instruct the individual to register for the self-paced, web-based Printing Procurement Delegation training course in ARCareers.
- > Ensure the individual finishes the course and pass the assessment with a score of at least

75%.

Email a copy of the course certificate to the OSP Training mailbox at <a href="mailto:osp.training@arkansas.gov">osp.training@arkansas.gov</a>.

After OSP reviews the course certificate and issues the delegation order, the individual will receive an email notification stating that the printing delegation order has been issued and is posted on the <u>Delegation Order</u> webpage of the OSP website.

# **Delegation Order Amounts (Delegated Authority)**

- Delegates at colleges and universities with APOs will be issued delegated authority of \$100,000.
- ➤ Delegates at colleges without an APO will be issued delegated authority of \$75,000.
- > Delegates at state agencies will be issued delegated authority of \$75,000.

Delegated authority limits are per purchase. Repeated small quantity procurements to circumvent the competitive bid limits will not be allowed and shall result in suspension of the Printing Delegation Order and withdrawal of the State agency's competitive bid privileges. See ACA §19-11-234(d).

Delegates with printing requests expected to exceed their issued authority must submit a purchase requisition to OSP for processing.

# **Printing Purchase Requirements**

Per R1:19-11-234, if the cost of the printing, stationery, and supplies commodity is seventy-five thousand dollars (\$75,000) or less, the agency must obtain, wherever possible, at least three (3) written competitive bids.

At minimum, solicitation documents must include the following:

- Clear, concise specifications that are consistent with industry standards.
- > Delivery requirements and FOB delivery point.
- Soy ink requirement, if applicable (ACA §19-11-102).
- > Standard terms and conditions.

Purchases over \$75,000 must be purchased using competitive sealed bids.

#### **Bid Folder Requirements**

The following documents must be maintained for all printing purchases per the State's record retention schedule:

- Copy of the Competitive Bid document
- > All bid submissions from vendors
- > A list of all vendors invited to participate
- OSP-approved bid tabulation document
  - The bid tabulation must include all vendors contacted for a quote, purchase quantity, the unit cost per item, and the extended cost for each item. The bid tabulation should also include vendor contact information, a description of items being purchased, the brand of stock being purchased (whether virgin or recycled),

- and the brand of ink being purchased.
- > Justification for "no substitution" on paper stock (if applicable).
- ➤ Justification if Soy Ink is not required (ACA § 19-11-102).

#### **Suspension of Delegation**

- Procurement Law and Regulations have not been followed.
  - 1<sup>st</sup> offense warning.
  - 2<sup>nd</sup> offense suspension.
     Delegation Orders will be suspended for all delegates at the agency for a minimum of six (6) months.
- Exceeding Delegated Authority
  - 1<sup>st</sup> offense warning.
  - 2<sup>nd</sup> offense suspension.
    - Delegation Orders will be suspended for all delegates at the agency for a minimum of six (6) months.
    - Note: Contact OSP for instructions (prior to awarding contract) should a bid exceed delegation authority.
- Purchases not following Delegation Order requirements.
  - 1<sup>st</sup> offense warning.
  - 2<sup>nd</sup> offense suspension.

    Delegation Orders will be suspended for all delegates at the agency for a minimum of six months.

# **Reinstatement of Suspended Delegation**

- > After the minimum suspension period:
  - The agency director must submit a written request to the State Procurement Director for reinstatement. Request must provide remedy and steps taken to ensure compliance with program requirements.
  - Delegates must re-attend training.

# **Revocation of Delegation**

Suspended Delegation Orders will be reissued one time only. Should delegates fail to adhere to the requirements stated herein, Delegation Orders will be permanently revoked and OSP will process all printing purchases for that agency.

#### REPRINTING

All printing completed through a private printing firm must be quoted. Identical reprints must be rebid. Agencies may not go back to the original vendor and reorder without requoting.

#### MANDATORY STATEWIDE CONTRACTS

OSP maintains a list of mandatory statewide contracts on the state contracts webpage. Check the website for current statewide contracts for paper and printed items and for information regarding mandatory statewide contracts.

#### **SOLICITATIONS**

# Items to consider when conducting a solicitation using your Printing Delegation Order:

- > Give all vendors the same information.
- A minimum of three (3) written quotes is required, but competition should be used to the greatest extent practicable.
- Target vendors who have the capability and equipment needed.
- Verbal quotes are not acceptable.

#### **PROMOTIONAL ITEMS**

Promotional items range from pins, buttons, pens, tee shirts, sweatshirts, and plaques. Items of this nature are not normally permitted to be purchased utilizing state appropriated funds. However, agencies may be authorized to purchase promotional items if special language is included in their agency's appropriation acts in accordance with ACA §19-4-525(c).

Furthermore, agencies are prohibited from using public funds to purchase promotional items made in China (ACA 25-1-1204).

Agencies purchasing promotional items must:

- > Identify if an item being purchased falls under the definition of promotional items.
- Verify the country of origin for such items.
- Ensure that promotional items made in China are not purchased with state public funds under new or renewed contracts.

#### **CHECKLIST**

The following is a basic checklist of specifications, including standard information, that should be included on printing solicitations.

- Commodity type (brochure, letterhead, name of publication)
- Scope of work
- Delivery requirements and FOB Location (requirement of Printing Delegation Order)
- Quality

- Quantity
- Size
- Number of pages (if applicable)
- Per signature rate (if applicable)
- Paper stock type
  - Recycled, Virgin, or vendor choice
  - Coated or uncoated
  - Weight
  - Type (offset, bond, index, carbonless,
- Recycled paper definition (if applicable)
- Labels
  - Style
  - Adhesive
  - Liner
- Envelopes OSP recommends providing a sample with the solicitation
  - Window (size and location)
  - Adhesive
  - Seams
- ➤ Ink
  - Soy ink requirement
  - Color of inks (4-color, black plus one PMS, etc.)
  - Location for vendor to identify the brand of ink requested
- Coating
- Production material or Composition requirements
- Presswork
  - Description of item Perforations (type location)
  - Printed front/back Scoring
  - Folds
- **Embossing**
- Trim
- Die Cuts
- Reverses
- Numbering
- Bleeds
- Graphics included (state seal, etc.)

- > Proofs
- Overrun/underrun
- Packaging requirements
- > Terms & conditions (requirement of Printing Delegation Order)

#### STATE OPERATED PRINTING FACILITIES

Printing purchased through a state operated printing facility does not need to be competitively bid regardless of the dollar amount. Best practice is to get an estimate first and compare it to

- Finish (smooth, light cockle, linen, etc.)
- Minimum brightness
- Location for vendor to identify brand/type of stock being purchased

a quote from a private printer to obtain best possible pricing. Refer to ACA 19-11-251 for Intergovernmental Agreements.

#### LIST OF STATE OPERATED PRINT SHOPS

For a list of state operated print shops:

- Visit the Transformation and Shared Services Procurement <u>webpage</u>
- Click the Procurement Resources link
- Click Laws, Rules and Policies
- Scroll down to the Printing Procurements heading

#### **DEFINITIONS**

#### **BINDING DEFINITIONS**

**CASE BOUND BOOKS:** Books with a hard cover. This involves sewing the individual signatures together, flattening the spine, applying end sheets, and a strip of cloth to the spine. The hard cover is then attached. The spine of a case bound hard cover book is typically rounded and there are hinges (grooves) along the edges of the cover near the spine.

**HARDBOUND BOOKS:** A book with a stiff cover, which is made separately, with the sewed book being inserted and fastened (called casing-in); the stiff cover is called the case.

**PERFECT BOUND BOOKS:** Binding type that secures pages and cover together with glue at the spine.

**PLASTIC COIL BOUND BOOKS:** Books that are bound using plastic coil binding. Binding coils come in different sizes and colors. In most bids, vendors are asked to determine the size of the coil to accommodate the number of pages. This is also known as comb binding.

**SADDLE STITCHED BOOKS:** Publications that are bound using staples. Usually request 2 staples but books can be bound using 3 staples.

**WIRE-0-BINDING:** The wire forms loops that fit into rectangular holes that have been punched in the paper. The loops are crimped to hold the wire in place.

#### **ENVELOPE DEFINITIONS**

**BARONIAL:** This style of envelope has a large, pointed seal flap and is primarily used for greeting cards or social stationary. The name Baronial is derived from "baron" which signifies a high standing.

**BUSINESS REPLY or RETURN ENVELOPE:** These two envelopes can be any style or size. The distinct difference between them is "who pays the postage?" A business reply is referred to as the envelope that has a pre-printed First-Class Permit and return address on it and the original

sender pays for its return. The business return has a pre-printed return address but the individual returning the envelope must pay the postage.

**CATALOG:** All envelopes with the "open end" flap are called catalog.

**CENTER SEAM:** This is the permanent seam that is located approximately in the center of the envelope and runs from the bottom fold and seam up through the envelope and terminates at the throat.

**COMMERCIAL STYLE:** These are the most common business style envelopes. They are "open side" of diagonal construction. This applies to a wide range of sizes from 6-1/4" through 14" - both regular and window envelopes.

**DIAGONAL SEAM:** This is a seam running diagonally from the bottom fold and corner upward toward the throat of the envelope.

**FLAPS FOLDED DOWN:** This term refers to converted envelopes when their flaps are folded down against the back of the envelope. Most envelopes are packed in boxes in this fashion as opposed to with flaps extended.

**OPEN END:** A style of envelope on which the opening is on the shorter side. All open-end envelopes are called catalog or coin envelopes.

**OPEN SIDE:** A style of envelope on which the opening is on the longer side. All commercials and booklets are open side.

**REGULAR:** A style of Commercial, Official, or Bankers Flap envelope which does not have a window panel cut out of it.

**REMITIANCE:** A large style seal flap of approximately the same size and shape as the envelope itself.

**SQUARE FLAP:** A style of flap with straight edges and rectangular corners.

**WINDOW:** Any style envelope having a panel or panels cut out of its face and/or back to permit viewing a portion of its contents.

**BACK GUM:** This gum applies to the permanently closed seams; quick drying.

**LATEX SEAL:** This gum adheres only to itself. A matching pattern must be applied to both flap and body of envelope for sure bond. No moistener needed.

**PEEL & SEAL:** A self-adhering seal flap adhesive with a protective strip. No moistening agent required.

**REMOISTENING GUM:** This adheres to the seal flap during the manufacturing process. Requires a moistening agent.

#### **INDEX TAB DEFINITIONS**

**BANK:** One row of tabs in consecutive order. Example: If you order 200 sets of 10 tabs, 1/5 cut, and your titles are numbers 1-10, then numbers 1-5 will make up the first bank; numbers 6-10 will make up the second bank.

**BODY COPY:** Printing on divider in addition to the copy on tabs. Note: Not available under this contract.

**CUT:** The length of the tab, designated by the number of tabs it takes to fill one bank at a certain tab length. For long titles, you should allow longer cuts so the words fit legibly.

**MYLAR:** A registered trademark from DuPont. One type is a coating placed on the tab to protect it from wear and tear. The Mylar can be clear or colored. A second type is the strip placed on the back edge of the paper where the holes are drilled.

**POSITION:** The location of a particular tab in a bank.

**PUNCHING or DRILLING:** The process of cutting holes in the index tab dividers for installation into a three-ring binder or file folder.

**SET:** The entire grouping of tabs. The total number of tabs in all banks equals a set.

**TAB:** The extended portion of the sheet usually covered with protective clear or colored Mylar.

**TAB EXTENSION:** The measurement of how far the tab extends from the page.

#### **PAPER TYPE DEFINITIONS**

**BOND:** Is an office paper made for use in copiers and laser printers; it is commonly used by printers for letterhead, books, manuals, newsletters, and sales sheets.

**UNCOATED OFFSET:** Made for commercial offset presses and is often used for the same applications as bond.

#### **COMPARATIVE BASIC WEIGHTS**

Bond	Text	Cover	Bristol
20#	50#	-	-
24#	60#	-	-
28#	70#	-	-
32#	80#	-	-
40#	100#	55#	67#
-	120#	65#	80#
-	-	80#	100#
-	-	100#	120#

#### **GENERAL DEFINITIONS**

**BACKBONE:** The bound edge of a book; also called a spine.

**BLEED:** An illustration that extends to one or more of the edges of a printed piece. Bleed illustrations are usually printed 1/8" beyond the planned trim edge(s).

**BRIGHTNESS:** In paper, this is the amount of light diffusely reflected from a surface, compared to that which would be reflected from a block of bright magnesium Oxide; the measurement is made with a specific wave length of light (blue), with the surface of an opaque pad of paper being illuminated at a 45° angle and the reflection being measured at a 90° angle; the human eye sees only reflected light and brightness influences printed contrast and the amount of illuminating light which is reflected.

C1S: Paper that has been "coated one side."

C2S: Paper that has been "coated two sides."

**CALIPER:** Thickness of a sheet of paper measured under specified conditions, generally expressed as one-thousands of an inch (0.001") "mils" or "points;" measured with an instrument called a micrometer or caliper.

**CARBONLESS PAPER:** Paper which, when used in multi-ply or multiple copy forms, transfers an image by the action of an impact or writing instrument to the sheets below on the front (CF) and back (CB) of sheets.

**CB PAPER:** Coated Back; the coated donor sheet of mated carbonless paper, used in multiple part forms; the CB coating contains colorless dyes, microencapsulated with a suitable solvent, for controlled release and development of color on the CF receiver sheet; will have the CB coating on the back of all but the last ply of the form.

**CF PAPER:** Coated Front; the coated receiver sheet of mated carbonless paper, used in multiple part forms; contains a color developer in CF coating; will have the CF coating on the  $2^{nd}$  through the last ply of the form.

**CFB PAPER:** Coated Front and Back; The intermediate of middle plies of mated carbonless paper, used in multiple part forms. CFB paper has both CF and CB coatings.

**COATED PAPER:** Paper which has been coated with a material to provide printing ink holdout, smoothness, and levelness.

**COCKLE OR COCKLING:** A surface that is "puckered" or with a rippling effect.

**COLOR SEPARATION:** The process of separating full color originals into the primary printing colors; see "three-color" and "four-color" process.

**CONTINUOUS FORMS:** Business forms produced in a continuous or web format, which may be cut to individual length or perforated for easy tear to individual length, at the form's manufacturer, or during or after use. May also be used in the continuous format, in roll or fanfold/accordion form.

**COPY:** The furnished material to be used in the production of the printed job.

**COVER PAPER:** General term applied to heavier basis weight durable printing papers, normally used for outside covers.

**CUT-OUTS:** Printed pieces cut into irregular shapes, or with cut out holes (like an envelope window).

**CUT-SIZE PAPER:** Refers to any lift of paper which is 17" x 22" or less in dimensions. Generally, specific to business papers, which are "cut-to-size" to 8-1/2" x 11", 8-1/2" x 14", and 11" x 17."

**DECKLE EDGE:** The untrimmed, feather edge of the dried paper from the paper machine.

**DULL FINISH:** Any finish lacking gloss and/or luster.

**EMBOSSED:** A raised image or design in paper surface created by using male and female dies; an unprinted design created in this manner is referred to as blind embossing.

**FINISH:** The finish of a sheet of paper refers to the condition of its surface.

**FOUR-COLOR PROCESS:** The printing of a full color picture or drawing by the use of four separate process printing inks: yellow, magenta, cyan, and black.

**GHOSTING:** Ghost images are unwanted images (often faint) that appear in the printed piece.

**GLOSS:** The "shininess" ("glare") reflected from a surface.

**GUTTER:** The inside margin in a bound piece, between the printed area and the binding; also, gutter margin.

**HALFTONE:** The process in printing to impart tonal value to a printed piece with a single color of ink, created by separating the different tonal value areas into dots of varying size. This can create a full range of from 5 to 95% ink coverage of the paper area to be printed. The term "halftone" is used to signify any printed area that has been printed with small dots, to create a tonal effect, but technically, a "halftone" is a printed area where half or 50% of the area is covered by any number of, or sized dots or ink.

**HICKEYS:** When foreign material sticks to the printing press blanket or plate in an image area, it interferes with the transfer of ink to or from the blanket surface. The printed imperfection created can appear as a hickey (a white area around a dark center).

**LINEN FINISH:** An embossed finish to simulate the pattern originally obtained by pressing paper between sheets of linen cloth.

**M:** Abbreviation for a quantity of 1,000.

**MATTE FINISH:** See "gloss;" the non-glossy appearance resulting from being an uncoated sheet of paper; the least glossy of paper surfaces available.

**OPACITY:** The characteristic of paper to block the transmission of light, or the ability to provide (low opacity, like tracing paper) or prevent (high opacity) "slow thru" of dark printing.

**OVERRUNS:** A quantity of items printed in excess of the amount ordered; in printing, copies printed in excess of the quantity ordered.

**PERFORATE:** Punching a series of holes or slits in a line in the paper to weaken it so tearing will occur easily along that line.

**PERFS:** The actual holes or slots created during perforating.

**PMS® COLOR:** An abbreviation for "Pantone Matching System®"; an ink color system containing about 500 color swatches; swatch of which is identified by a color number and a formula for ink.

**PROOFS:** Samples of copy and/or layout made at various stages of production of a printing job.

**SATIN FINISH:** See "gloss;" a finish lacking gloss, generally intermediate to a matte finish and a dull finish.

**SCORE:** The process and the resulting line mechanically impressed into a heavy sheet of paper or board, to pre-stress the fold line and facilitate folding or improve the appearance of the fold.

**SCREEN PRINTING:** A form of porous printing. The process by which the image area is created by forcing ink thru a "screen" or "mesh," created by blocking off all areas in the "screen" where no image is to be formed; an example would be silk screen printing of t-shirts.

**SHADOW MARKS:** Defects which appear as a regular pattern, always when viewed by transmitted light and sometimes when viewed by direct light; can also be intentional watermark patterning.

**SIGNATURE:** A folded sheet of printed paper; usually a section of a book or magazine (or newspaper), ordinarily obtained by the folding of a single sheet into 4, 8, 16, or more pages. The term can also be applied to a printed flat sheet that is to be later folded into a multi-page document.

**SILK SCREEN PRINTING:** See "screen printing;" originally, the porous material for making the screen was a silk fabric, thus the name.

**SMEAR:** The spreading of ink, usually due to abrasion or rubbing of freshly (not yet set) printed ink to adjacent areas of the paper surface.

SMUDGE: See "smear."

**SPINE:** See "backbone."

THICKNESS: See "caliper."

**THREE-COLOR PROCESS:** The printing of a full color picture or drawing by the use of only three separate colors: yellow, magenta, and cyan.

**TRIMMED SIZE:** The final size of a printed piece after all bleeds and folds have been cut off.

**UNDERRUNS:** A quantity of paper made which is less than the quantity specified in the order; see "overruns."

**UV INKS:** Special inks composed of materials that set and dry by being exposed to ultraviolet radiation.

**VARNISH:** An oil used as the vehicle on printing inks which has been bodied by heat (or chemically), or by the addition of gums, resins, or other material; a thin coating applied to a finished printed job for protection or appearance.

**VELLUM FINISH:** A full, toothy, relatively rough surface of uncoated text or book papers; generally, intermediately in smoothness to an antique (very rough) finish and a regular or smooth finish.

#### **RESOURCES**

**Competitive Grade Finder:** Order information: <u>www.gradefinders.com</u>

**Micrometer:** Tool to measure paper thickness. Most paper merchants can order one for you.

PMS® Ink Chart (Pantone Matching System®): The Pantone Color Formula Guide - commonly used to specify spot color and is widely used in the printing industry.

To see products available through Pantone, visit their website at <a href="https://www.pantone.com">www.pantone.com</a>