

MANATEE COUNTY GOVERNMENT SOURCE SELECTION

SUBJECT	Generation and Mailing of Utility Bills and Notices	DATE POSTED	November 24, 2009
PURCHASING REPRESENTATIVE	Frank Lambertson, 749-3042	DATE CONTRACT SHALL BE AWARDED	December 1, 2009
DEPARTMENT	Financial Management Dept./Purchasing Div.	CONSEQUENCES IF DEFERRED	N/A
SOURCE RECOMMENDATION	SouthWest Direct, Inc.	AUTHORIZED BY DATE	Rob Cuthbert November 24, 2009

ACTION DESIRED

Authorization to enter into negotiations with SouthWest Direct, Inc., Ft. Myers, FL for the purpose of providing for the generation and mailing of utility bills and notices.

ENABLING/REGULATING AUTHORITY

Federal/State law(s), administrative ruling(s), Manatee County Comp Plan/Land Development Code, ordinances, resolutions, policy.)

Manatee County Code of Laws, Chapter 2-26 Manatee County Purchasing Ordinance, Section 2-26-40 and the Standards and Procedures approved by the County Administrator.

BACKGROUND/DISCUSSION

- The Manatee County Utilities Department has a requirement to process electronic customer account data provided by the County via automated, electronic transmission and furnishing forms and envelopes for printing, inserting and mailing of utility customer bills, notices, inserts, etc. and furnishing required reports and statistics to the County.
- 7/28/09 – 11/9/09 the appropriate proposal procedures were followed. The Request for Proposal (RFP) was broadcast via DemandStar to one hundred thirty (130) possible firms who generate and mail various bills and notices; thirty (30) firms downloaded the RFP and twenty four (24) firms' submitted proposals.
- In an effort to inform local Manatee firms the RFP was advertized locally in the Bradenton Herald, posted on the County's website and provided to the Manatee County Chamber of Commerce. However, no Manatee County firms responded to the RFP.
- Proposals were received from the following suppliers:

PGH Mailing, Pittsburgh, PA	Kubra America South, Atlanta, GA
Documents Southwest, Albuquerque, NM	Axis, Orlando, FL
Utilitec, Troy, MI	Total Billing Inc., Charlotte, NC
Southwest Direct Inc., Ft. Myers, FL	Datamatx, Ashland, VA
Mark Altman & Assoc., Hudson, MA	Tropical Mailing, Ft. Lauderdale, FL
Municipal Code Corp., Tallahassee, FL	Info Send, Fullerton, CA
Data Prose, Coppell, TX	Allison Payment Systems, Indianapolis, IN
High Cotton, Birmingham, AL	RR Donnelley, Antah, TN
Level One, Malvern, PA	Pride Enterprises, St. Petersburg, FL
TC Specialties Co., Tampa, FL	Scicon Data, Minnetonka, MN
The Statement Co., New Berlin, WI	Arista, Duluth, MN
Pinacle Data Systems, Marietta, GA	Questmark, Houston, TX

SUMMARY	Recommend negotiations with SouthWest Direct, Inc., Ft. Myers, FL
----------------	---

ATTACHMENTS: (List in order)	INSTRUCTIONS TO BOARD RECORDS:
1. Approval Email-Ed Hunzeker	
COST	To be negotiated
SOURCE (ACCT# & NAME)	Department to advise
COMMENTS	N/A
AMT./FREQ. OF RECURRING COSTS (ATTACH FISCAL IMPACT STATEMENT)	N/A



Re: Selection for Negotiations - Generation and Mailing of Utility Bills and Notices

Ed Hunzeker to: Rob Cuthbert
Cc: Frank Lambertson

11/23/2009 09:58 AM

Great!

Thank you!

Ed

Rob Cuthbert

Mr. Hunzeker, We are communicating the recom...

11/20/2009 02:25:27 PM

From: Rob Cuthbert/MCG
To: Ed Hunzeker/MCG@MCG
Cc: Frank Lambertson/MCG@MCG
Date: 11/20/2009 02:25 PM
Subject: Selection for Negotiations - Generation and Mailing of Utility Bills and Notices

Mr. Hunzeker,

We are communicating the recommended selection of SouthWest Direct, Inc., Ft. Myers, FL for process electronic customer account data provided by the County via automated, electronic transmission and furnishing forms and envelopes for printing, inserting and mailing of utility customer bills, notices, inserts, etc. and furnishing required reports and statistics to the Utilities Department. Estimated cost for this work: \$645,000 per year (a term of three years with a two year option is being considered).

In an effort to inform local Manatee firms the RFP was advertized locally in the Bradenton Herald, posted on the County's website and provided to the Manatee County Chamber of Commerce. However, no Manatee County firms responded to the RFP.

Staff will proceed with the posting of the selection and beginning negotiations upon your confirmation.

Thank you. Rob Cuthbert

Background:

7/28/09 – 11/9/09 the appropriate proposal procedures were followed. The Request for Proposal (RFP) was broadcast via DemandStar to one hundred thirty (130) possible firms who generate and mail various bills and notices; thirty (30) firms downloaded the RFP and twenty four (24) firms' submitted proposals.

Proposals were received from the following suppliers:

PGH Mailing, Pittsburgh, PA	Kubra America South, Atlanta, GA
Documents Southwest, Albuquerque, NM	Axis, Orlando, FL
Utilitec, Troy, MI	Total Billing Inc., Charlotte, NC
Southwest Direct Inc., Ft. Myers, FL	Datamatx, Ashland, VA
Mark Altman & Assoc., Hudson, MA	Tropical Mailing, Ft. Lauderdale, FL
Municipal Code Corp., Tallahassee, FL	Info Send, Fullerton, CA
Data Prose, Coppell, TX	Allison Payment Systems, Indianapolis, IN
High Cotton, Birmingham, AL	RR Donnelley, Antah, TN
Level One, Malvern, PA	Pride Enterprises, St. Petersburg, FL
TC Specialties Co., Tampa, FL	Scicon Data, Minnetonka, MN
The Statement Co., New Berlin, WI	Arista, Duluth, MN

- The Selection Committee consisted of:

Angie Bibler, Financial Management Department
 Renee Nordbye, Utilities Department
 Frank Lambertson, Purchasing Division

- 9/23/09 the Selection Committee convened and shortlisted the following firms:

Axis, Orlando, FL
 Pride Enterprises, St. Petersburg, FL
 Southwest Direct Inc., Ft. Myers, FL
 TC Specialties Co., Tampa, FL

- 10/9/09 the Selection Committee convened and heard oral presentations from the short listed firms.
- 11/9/09 the Selection Committee convened and ranked the firms as follows for the purpose of negotiating a contract with the top ranked firm:

Ranked #1 – SouthWest Direct, Inc., Ft. Myers, FL - The proposer was determined to best meet the needs of the County. Of particular importance are: billing volumes similar in size to the County's requirements, positive responses from reference verification process, proposed optional billing solutions, and demonstrated a willingness to work with the County to meet our requirements now and in the future.

Ranked #2 – Axis, Orlando, FL – The firm submitted a professional proposal and made an informative oral presentation. However, the Selection Committee ranked it second due to the perception of a lesser ability to meet the County's requirements.

Ranked #3 – TC Specialties Co., Tampa, FL - The proposer submitted a satisfactory proposal demonstrating their ability to provide the required services. However it was ranked third when compared to the top ranked firms and the Selection Committee expressed concerns related to proposed costs.

Ranked #4 - Pride Enterprises, St. Petersburg, FL – The proposer demonstrated the ability to provide the services at a low cost however not at the volume required by the County. Additionally, future expansion of the billing process was unlikely and that this firm did not have the capabilities matching that of the higher ranked firms

- The remaining respondents not shortlisted are:

PGH Mailing, Pittsburgh, PA	Kubra America South, Atlanta, GA
Documents Southwest, Albuquerque, NM	Utilitec, Troy, MI
Total Billing Inc., Charlotte, NC	Datamatx, Ashland, VA
Mark Altman & Assoc., Hudson, MA	Tropical Mailing, Ft. Lauderdale, FL
Municipal Code Corp., Tallahassee, FL	Info Send, Fullerton, CA
Data Prose, Coppell, TX	Allison Payment Systems, Indianapolis, IN
High Cotton, Birmingham, AL	RR Donnelley, Antah, TN
Level One, Malvern, PA	Scicon Data, Minnetonka, MN
The Statement Co., New Berlin, WI	Arista, Duluth, MN
Pinacle Data Systems, Marietta, GA	Questmark, Houston, TX

Although well qualified, these firms were not short listed based on a comparison of capability in providing the required services.

Pinacle Data Systems, Marietta, GA

Questmark, Houston, TX

The Selection Committee consisted of:

Angie Bibler, Financial Management Department
Renee Nordbye, Utilities Department
Frank Lambertson, Purchasing Division

9/23/09 the Selection Committee convened and shortlisted the following firms:

Axis, Orlando, FL
Pride Enterprises, St. Petersburg, FL
Southwest Direct Inc., Ft. Myers, FL
TC Specialties Co., Tampa, FL

10/9/09 the Selection Committee convened and heard oral presentations from the short listed firms.

11/9/09 the Selection Committee convened and ranked the firms as follows for the purpose of negotiating a contract with the top ranked firm:

Ranked #1 – SouthWest Direct, Inc., Ft. Myers, FL - The proposer was determined to best meet the needs of the County. Of particular importance are: billing volumes similar in size to the County's requirements, positive responses from reference verification process, proposed optional billing solutions, and demonstrated a willingness to work with the County to meet our requirements now and in the future.

Ranked #2 – Axis, Orlando, FL – The firm submitted a professional proposal and made an informative oral presentation. However, the Selection Committee ranked it second due to the perception of a lesser ability to meet the County's requirements.

Ranked #3 – TC Specialties Co., Tampa, FL - The proposer submitted a satisfactory proposal demonstrating their ability to provide the required services. However it was ranked third when compared to the top ranked firms and the Selection Committee expressed concerns related to proposed costs.

Ranked #4 - Pride Enterprises, St. Petersburg, FL – The proposer demonstrated the ability to provide the services at a low cost however not at the volume required by the County. Additionally, future expansion of the billing process was unlikely.

And that this firm did not have the capabilities matching that of the higher ranked firms

The remaining respondents not shortlisted are:

PGH Mailing, Pittsburgh, PA
Documents Southwest, Albuquerque, NM
Total Billing Inc., Charlotte, NC
Mark Altman & Assoc., Hudson, MA
Municipal Code Corp., Tallahassee, FL
Data Prose, Coppell, TX
High Cotton, Birmingham, AL
Level One, Malvern, PA
The Statement Co., New Berlin, WI
Pinacle Data Systems, Marietta, GA

Kubra America South, Atlanta, GA
Utilitec, Troy, MI
Datamatx, Ashland, VA
Tropical Mailing, Ft. Lauderdale, FL
Info Send, Fullerton, CA
Allison Payment Systems, Indianapolis, IN
RR Donnelley, Antah, TN
Scicon Data, Minnetonka, MN
Arista, Duluth, MN
Questmark, Houston, TX

Although well qualified, these firms were not short listed based on a comparison of capability in providing the required services.

Frank G. Lambertson, Contracts Negotiator

Manatee County Government, Purchasing Division
frank.lambertson@mymanatee.org
Phone: 941-749-3042
Fax: 941-749-3034