

**Item Title:** Document Production and Distribution Services for Tax Bills, Property Listing Forms, Utility Bills, and Various Accounts Receivable Related Notifications

**Specific Action Requested:**

**That the Board of Commissioners approves the recommendation for the Wake County Revenue Department to award SouthData Inc. a three-year document production and distribution contract with the option of two additional one-year renewals and authorize the County Manager to execute such contract.**

**Item Summary:**

**Purpose:** Contract for services related to the printing and mailing of County property tax, election, solid waste, and public health client notices.

**Background:** A Request for Proposal (RFP #18-109) was issued on September 26, 2018. The purpose of the request was to solicit bids from experienced vendors wishing to provide the Revenue Department and various municipalities and County departments with document production and distribution services. Bid closing occurred on October 23, 2018.

Two vendors submitted proposals to the request, including Professional Mail Services Inc. (PMSI) and SouthData Inc.

A review panel conducted a thorough and fair analysis of the proposals. The participating team members were in agreement that each vendor possesses the capability of providing the required services to Wake County, but the proposal from SouthData Inc. offered the most competitive pricing. The pricing differential between the two participating vendor submittals is approximately \$76,239 during the term of the three-year contract.

**Board Goal:** This action supports routine County operations.

**Fiscal Impact:** The three-year contract total will come to roughly \$783,000. This will be covered within existing budget resources.

**Additional Information:**

SouthData is the County's current document production and distribution service provider. The company's proposal submitted in response to this RFP maintains all costs and services at the rates initially established in 2014.

Review Panel members included:

Dan McCarty, Appraisal & Collection Manager, Revenue Department  
Susan Campen, IT Business Analyst, Revenue Department

Gary Sims, Director, Board of Elections  
Sonya Hicks, Senior Accountant, Finance Department

The contract will stipulate that the negotiated pricing be available to all Wake County departments and municipalities should they chose to employ SouthData's services at any time during the term of the contract.

Annual contract costs are estimated below:

<b>FY</b>	<b>Services</b>	<b>Sales Tax</b>	<b>Postage</b>
19/20 Revenue	\$46,502.06	\$3,674.93	\$210,959.45
19/20 Revaluation	\$43,380.00	\$3,145.05	\$129,847.50
20/21 Revenue	\$47,285.06	\$3,731.16	\$217,715.87
21/22 Revenue	<u>\$48,093.87</u>	<u>\$3,789.26</u>	<u>\$224,502.27</u>
<b>Total</b>	<u><u>\$185,260.99</u></u>	<u><u>\$14,340.40</u></u>	<u><u>\$783,025.09</u></u>

Each year Revenue sends out approximately 525,000 notices. Every four years, there is also a Notice of Assessment.

Annual contract notices are estimated below:

<b>FY</b>	<b>Notice</b>
19/20 Revenue	525,000
19/20 Revaluation	375,000
20/21 Revenue	535,000
21/22 Revenue	<u>545,000</u>
<b>Total</b>	<u><u>1,980,000</u></u>

**Attachments:**

1. Vendor Cost Comparison