



**TO:** Robert Gleason, Director of Purchasing  
Purchasing Division  
**FROM:** Alan W. Garcia, P.E. Director  
Water and Wastewater Services  
**SUBJECT:** Solicitation No.: OPN2128319B1  
Solicitation Title: Utility Statement Services

Recommended Vendor: InfoSend, LLC

Recommended Group(s)/Line

Item(s): Initial Award Amount: \$ 938,891.00 Potential Total Amount: \$ 2,347,227.50 includes \$1,750,000 pass thru for postage

Initial Contract Term: Two Years Contract Term, including Renewals: Five Years

**CONCURRENCE:**

☐ The agency has reviewed Vendor's response(s) for specification compliance and Vendor responsibility, which includes license requirements (if applicable). I have reviewed all documents including the Vendor Questionnaire and after careful evaluation, I concur with recommendation for award to the Vendor.

**FINANCIAL BACKGROUND/D & B REPORT: (check one)**

☐ I am satisfied with the Vendor's financial background and/or rating and payment performance.  
☐ Not applicable Provide explanation if choosing this option

**LITIGATION HISTORY: (check one)**

☐ I have reviewed the Litigation History Form and there is no issue of concern.  
☐ Refer to additional information from the Office of the County Attorney to address an issue/concern.

**PAST PERFORMANCE: (check all that apply)**

I have reviewed the Vendor's past Performance Evaluations in ContractsCentral and:

☐ Vendor received an overall rating  $\geq 2.59$  on all evaluations.  
☐ No evaluations within the past three years contained any items rated a score of 2 or less.  
☐ Vendor received a rating  $\leq 2.59$  on an evaluation(s). Refer to additional information.  
☐ Vendor received a score of  $\leq 2$  on an individual item(s). Refer to additional information.  
☐ Past evaluations are not relevant to the scope of this contract.  
☐ No past Performance Evaluations exist in ContractsCentral.

**AND**

☐ Reference Verification Forms are attached.

**OR**

☐ Reference Verification Forms are not required: Commodity only purchase (less than \$250,000); Service less than \$100,000 and the Vendor has a Performance Evaluation within the past three years.

**NON-CONCURRENCE:**

☒ I do not concur. Detailed reason for non-concurrence is attached, including the reference to any bid requirement.

TYPED NAME OF SIGNER: Richard Burgwyn  
(Individual authorized to administer the contract.)

TITLE: Accounting Supervisor

SIGNATURE: RICHARD BURGWYN Digitally signed by RICHARD BURGWYN  
Date: 2024.07.17 08:08:12 -04'00'

DATE: 7/17/24

Page 2 of 2

Concurrence: OPN2128319B1

Solicitation Title: Utility Statement Services


TYPED NAME OF SIGNER: Jonathan K. Allen

TITLE: Business Operations Director

SIGNATURE: Jonathan Allen Digitally signed by Jonathan Allen  
Date: 2024.07.16 17:07:44 -04'00'

DATE: July 17, 2024

TYPED NAME OF SIGNER: Alan W. Garcia P.E.  
(Individual authorized to administer the contract.)

TITLE: Director, Water and Wastewater Services 

SIGNATURE: Alan Garcia Digitally signed by Alan Garcia  
Date: 2024.07.18 10:49:42  
-04'00'

DATE: July 18, 2024

## Reason for Non-Concurrence

Bid No. OPN2128319B1, Utility Statement Services

Reviewed by:

- Marcia Mack, Accounting Manager
- Richard Burgwyn, Accounting Supervisor
- Ellie O'Connell, Administrative Officer, Sr.

Water and Wastewater Services (WWS) reviewed the bid response received from InfoSend, Inc. (InfoSend) In addition to completing the item response sheet (bid prices), InfoSend also attached to their bid response a detailed document responding to almost every specification number in the bid document.

After WWS completed a detailed review of InfoSend's bid response WWS also held a conference call with InfoSend (Marty Bielecki and Russ Alberti) to clarify InfoSend's bid response. This call was held on Monday, June 17, 2024, at 11am. After completion of this review, WWS is recommending the rejection of low, apparent bidder, InfoSend for Bid Number OPN2128319B1, Utility Bill Printing and Mailing Services for the following reasons:

1. Section 4.1.6 of the Specifications & Requirements of the bid document states the following:

**4.1.6.** Laser printer must be used to print statements and letters with a minimum of 600 x 600 dpi resolution.

Included in InfoSend's bid response was a detailed response to this specification requirement:

**4.1.6.** Laser printer must be used to print statements and letters with a minimum of 600 x 600 DPI resolution InfoSend's minimum resolution for transactional document printing is 600 DPI. InfoSend does employ a mix of imaging equipment with capabilities to produce up to 1200 x 1200 DPI with perceived resolution at 2400 x 2400 due to high-definition ink and variable drop sizes). InfoSend recommends and has quoted high speed variable inkjet printing which allows for production efficiency and same day disaster recovery which meets and exceeds the 600 x 600 dpi requirements.

In addition to their specific response to 4.1.6, InfoSend's detailed bid response included responses in multiple areas referencing the intended use of inkjet printers which is a clear and continuous failure to meet the specific specifications and requirements within the approved Bid.

See the following pages in InfoSend's bid response related to this print requirement which do not agree with Bid requirements.

Page 56, equipment list includes inkjet equipment.

Page 60, states that all facilities utilize inkjet printing onto white paper and standard stock envelopes.

Page 63, in the design services section of the bid response InfoSend states they use "Full-color inkjet printers".

Page 73, see above screenshot responding specifically to 4.1.6.

During the conference call with InfoSend, InfoSend confirmed their response to this specification, their bid response was structured to use ink jet printers for printing the utility statements and letters which demonstrates a failure to meet established specifications and requirements.

2. Specification 4.1.12 of the Specifications & Requirements of the bid document states the following:

**4.1.12.** Vendor must be able to begin providing utility statement data processing, printing, and mailing services within thirty (30) calendar days of notice to proceed from County. Final approval from the County's Business Operations Director, or appointed designee, must be obtained, in writing, before providing utility statement processing, printing, and mailing services.

Page 2 of 3  
Reason for Non-Concurrence (Cont'd)

Included in InfoSend's bid response was a detailed response to this specification requirement:

**4.1.12. Vendor must be able to begin providing utility statement data processing, printing, and mailing services within thirty (30) calendar days of notice to proceed from County. Final approval from the County's Business Operations Director, or appointed designee, must be obtained, in writing, before providing utility statement processing, printing, and mailing services.**

InfoSend accepts this requirement. Please see below an outline of our implementation schedule for customers who are providing us with data in PDF format.

### InfoSend Data Processing, Print and Mail Project Plan

Based on previous experience with Clients of similar size and structure, the following timeline has been provided for project implementation. The implementation timeline begins once the contracting phase has been completed and InfoSend has received test files and mockups from the Client. Receipt of the test files and mockups will allow the Account Manager to begin the technical implementation.

This is only a sample 12-week and assumes the Client will be attending weekly meetings and remaining responsive in providing deliverables necessary to complete the project.

Milestone: Requirements Gathering   Weeks 1-3		Responsibility
Kick-Off Meeting: Familiarize each party with the project managers assigned to the implementation		InfoSend & Client
Kick-Off Meeting: Review, confirm and discuss the client specifications and requirements		InfoSend & Client
Kick-Off Meeting: Discuss requested formatting changes to client output		InfoSend & Client
Kick-Off Meeting: Begin development of mockups incorporating client feedback		InfoSend
Kick-Off Meeting: Fill out Standardized Client Installation Checklist		InfoSend
Kick-Off Meeting: Begin to discuss data processing details and data mapping in management		InfoSend & Client
Go-Live Coordination: Begin parallel testing of application, including any automation scripts		InfoSend & Client
Go-Live Coordination: Complete parallel testing of application		InfoSend & Client
Go-Live Coordination: Internal Go-Live readiness checklist completed by Project Team and Management		InfoSend
Milestone: Go-Live   Week 12		
Go-Live: Receive and process first live file for distribution		InfoSend
Go-Live: Internal "First Live Run" Checklist completed, with review and signatures required from each department manager		InfoSend
Follow Up and Support: continue weekly meetings to cover additional questions or training until client satisfaction		InfoSend & Client

**8.2 Vendor must be ready to begin printing and mailing services within thirty (30) calendar days of notice to proceed from County. Final approval from the County's Business Operations Director, or appointed designee, must be obtained, in writing, before printing.**

InfoSend accepts this requirement. InfoSend will begin printing and mailing services within 45 days of notice to proceed

Specifications 4.1.12 and 8.0 (2<sup>nd</sup> paragraph): In Section 4.1.12 of InfoSend's detailed bid response they state that they accept this requirement, however they also provided a new customer implementation scheduled for customers who are providing their data in pdf format. This timeline reflects a 12-week detailed implementation plan which exceeds the 30-day requirement clearly stated



Page 3 of 3

Reason for Non-Concurrence – BID OPN2128319B1- Utility Statement Services (Cont'd)

in the bid specification. In Section 8.0 (2<sup>nd</sup> paragraph), InfoSend states that they accept this requirement, however they further state that they would begin services 45 days of notice to proceed. InfoSend's 45-day implementation exceeds the 30-day implementation requirement listed in the specifications and requirements to meet WWS operational needs.

During the conference call with InfoSend, InfoSend explained their detailed start up process and confirmed that their new customer implementation exceeded the Broward County's 30-day implementation schedule as listed in the bid specification. In addition, WWS issued Addendum #6 while the bid was advertised changing the data format from pdf to XML and issued it to all prospective bidders. InfoSend confirmed that start up services for XML data format will take longer than 30 days to implement. The 30-day new customer implementation schedule was determined to be a reasonable and achievable timeframe for WWS business operational purposes.

Bid OPN2128319B1 was advertised on April 11, 2024, and closed on May 2, 2024. The advertisement period included seven (7) days for vendors to ask questions. A total of 15 questions were received. No questions or requests for clarifications or requests to change the specifications were received related to the printing source or implementation timeframe.

Based on the above reasons, WWS requests approval of the rejection of InfoSend as they are not responsible to the bid requirements. More specifically, the InfoSend bid should be rejected for following two reasons: (1) InfoSend failed to meet the bid specifications which required the WWS utility bills to be printed on a laser jet printer and (2) InfoSend failed to meet the bid specifications which requires them to start/complete new customer implementation process and be ready to begin printing WWS utility statements within 30 days of notice to proceed.