



**CITY OF PORTLAND**  
**OFFICE OF MANAGEMENT AND FINANCE**

**Ted Wheeler, Mayor**  
**Tom Rinehart, Chief Administrative Officer**  
**Jennifer Cooperman, Chief Financial Officer,**  
**Bureau of Revenue and Financial Services**

**Lester Spitler**  
**Chief Procurement Officer**  
Procurement Services  
1120 SW Fifth Avenue, Rm 750  
Portland, OR 97204-1912  
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June 18, 2019

The Portland Water Bureau oversees the operations of the provisions required for bill printing, mailing and presentment for water and stormwater service utility customers. The printing and mailing of the bills are critical functions currently performed internally by two permanent retirement-eligible Water Bureau employees. The primary and back-up equipment used for the printing work are co-located in Printing & Distribution's shop. In the event the City experiences a natural disaster or a service interruption at either location, continued bill printing and mailing operations would be jeopardized. Responsible for the distribution of approximately 830,000 bills, 260,000 notices and 90,000 letters annually, the Water Bureau requires a solution to mitigate risk and provide off-site disaster recovery measures, which include multiple locations capable of handling this revenue generating work.

On July 18, 2018 Council passed Ordinance No. 189073 authorizing the Chief Procurement Officer to conduct a competitive solicitation in accordance with City Code for utility bill presentment for an estimated amount of \$7,500,000. On October 26, 2018, Procurement Services issued Request for Proposals (RFP) No. 00000985 for Utility Bill Printing, Mailing and Presentment (Water). Responses were due on November 26, 2018 and eight proposals were received. All eight proposals were deemed responsive to the requirements of the solicitation. The proposals were evaluated and scored by a panel of evaluators including a community member participant from the Minority Evaluator Program.

On February 11, 2019, the City issued a Notice of Intent to Negotiate and Award to the highest scoring proposer, InfoSend. The notice was publicly posted for seven calendar days and no protests were received during that period.

InfoSend has a current Business Tax registration and meets the City's contracting compliance requirements. The Bureau's level of confidence in the not-to-exceed amount for the Contract is "High" as there is good historical information regarding purchases made for these services.

Awarding a contract to InfoSend will provide the Water Bureau with the services required to meet the growing needs of the Water and Sewer utility customers who expect dynamic electronic bill present and payment options from the City. InfoSend will be the sole provider of the following services: paper bill, letter and notice printing mailing; electronic bill presentment; email notifications of bill availability and web-based presentation of the bill; return mail processing; management dashboards and reporting; marketing support; archival of bills; data security, and disaster recovery. I recommend the City award a contract to InfoSend for a not-to-exceed amount of \$4,600,000 over five years, and request that Council accept this report.

Recommended by:

Lester Spitler  
Chief Procurement Officer  
LS:tg

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*An Equal Opportunity Employer*

*To help ensure equal access to programs, services and activities, the Office of Management & Finance will reasonably modify policies/procedures and provide auxiliary aids/services to persons with disabilities upon request.*

Agenda No. **669**

Item Type: Report No. \_\_\_\_\_

Council Meeting Date: July 10, 2019

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Title: Authorize a contract for utility bill printing, mailing and presentment for a term of five years for \$4.6 million (Procurement Report - Project No. 122817)

### AGENDA TYPE

☐ Consent

☒ Regular

☐ Time Certain Start Time

Item 1 of 1

Total amount of time needed for presentation, testimony and discussion (Regular and Time Certain Only): 20 Minutes

INTRODUCED BY: Mayor Ted Wheeler

#### COMMISSIONER / AUDITOR APPROVAL

Mayor - Finance & Admin. - Wheeler Mustafa Washington

Digitally signed by Mustafa Washington  
Date: 2019.07.01 11:35:46 -0700

Position 1/ Utilities - Fritz

Position 2/ Works - Fish

Position 3/ Affairs - Hardesty

Position 4/ Safety - Eudaly

City Auditor - Hull Caballero

1) Is a completed Impact Statement attached? ☒ Yes

3) Is the item a Code ordinance? ☐ Yes ☒ No

If yes, Auditor Office Approval

5a) Is item a Portland Policy Document or Administrative Rule? ☐ Yes ☒ No

#### BUREAU APPROVALS

Bureau: OMF/BRFS

OMF/CAO: Carmen Merlo

Digitally signed by Carmen Merlo  
Date: 2019.06.19 10:54:59 -0700

Bureau Approval: Jennifer Cooperman

Digitally signed by Jennifer Cooperman  
Date: 2019.06.19 09:56:03 -0700

Prepared By: Theresa Green

Date Prepared: June 18, 2019

2) Does the item amend the budget? ☐ Yes ☒ No  
If yes, Budget Office Approval

4) Is this item a contract (current or future), code, easement, franchise, comp plan or Charter? ☐ Yes ☒ No  
If yes, Attorney Office Approval

5b) If yes, is the City Policy/Admin Rule directive in the ordinance or resolution? ☐ Yes ☐ No

#### ACTION TAKEN:

JUL 10 2019

**ACCEPTED PREPARE CONTRACT**

CLERK USE: DATE FILED 7/1/19

Mary Hull Caballero  
Auditor of the City of Portland

By: Keelan McClymont  
Deputy

Digitally signed by Keelan McClymont  
Date: 2019.07.01 14:06:21 -0700

#### FOUR-FIFTHS AGENDA

1. Fritz  
2. Fish  
3. Hardesty  
4. Eudaly  
Wheeler

#### COMMISSIONERS VOTED AS FOLLOWS:

	YEAS	NAYS
1. Fritz	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2. Fish	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Hardesty	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Eudaly	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wheeler	<input checked="" type="checkbox"/>	<input type="checkbox"/>