



LOXAHATCHEE RIVER DISTRICT

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D. Albrey Arrington, Ph.D. EXECUTIVE DIRECTOR

loxahatcheeriver.org

MEMORANDUM

To: D. Albrey Arrington, Ph.D., Executive Director
From: Bud Howard, Director of Information Services
Date: February 9, 2022
Subject: Customer Information & Billing, Payment Services and Print & Mail Services Solution

This is a request for the Governing Board's approval of a new customer information and billing system (CIS). Because of the tight integration among the CIS with payment services (e-check and credit card) and the print & mail provider we have incorporated these services areas too.

The District's present CIS has been in place for nearly 20 years. As the District has evolved, so have our needs and desires for centralized digital information to manage all aspects of our customers' information including billing, delinquency, commercial bill computations, sewer assessments, payment plans, etc. Over the years, we have worked with our CIS provider to build enhancements and we have developed computerized in-house tools to manage specific tasks because of constraints of our existing system. The result has been a collection of tools that generally meet our needs but are less effective and efficient than they could be. This, in conjunction with very little development occurring with our present CIS, we felt it was an appropriate time to explore the marketplace and we have found some very compelling solutions.

In December we advertised a request for proposals for CIS solutions, payment services providers and print & mail service providers. We encouraged respondents to provide submittals as partnerships of all three service areas, but it was not a requirement so that we could receive proposals from independent providers. The scoring criteria was explained in the RFP and based on 6 scoring factors shown below. We received a total of 14 proposals: 9 proposals from CIS solution providers (nearly all brought partners for payment and print & mail), 3 proposals from payment services-only providers, and 2 proposals from print & mail-only providers.

Scoring factors for the selection of the CIS solution.

Factor	Description	Points
1	Functional Fit / Comprehensiveness of Solution / Desired Features	25
2	Technology, Operational and Security Considerations	25
3	Implementation, Training and Conversion Proposals	15
4	Experience and Stability of Vendor	15
5	Price (10-year cost of ownership)	10
6	Considerations of Integrations and Collaborations Among Respondents	10
	Total	100

Gordon M. Boggie
CHAIRMAN

Stephen B. Rockoff
BOARD MEMBER

Dr. Matt H. Rostock
BOARD MEMBER

James D. Snyder
BOARD MEMBER

The selection committee reviewed all of the proposals. Based on a preliminary assessment of the scoring factors, the selection committee shortlisted two firms (Edmunds GovTech and Util360) as the highest ranked vendors. We then conducted web demonstration/meetings with both leading vendors. Following the demonstration, and additional review and analysis, neither firm was a clear leader, and we scheduled a 2nd demonstration/meeting to get more details on their proposed solutions. At this point the selection committee began researching both of the highest ranked vendors and independently verifying their references and customers. During the more thorough assessment of scoring factors for Util360, the selection committee became aware of a lack of independently verifiable information regarding the company and their experience providing the solutions we are seeking to other, similar government water/wastewater utilities (scoring factor 4). The selection committee then cancelled Util360's 2nd presentation because they were no longer a contender for the top selection.

After a thorough assessment, the selection committee ranked Edmunds GovTech as the best value for the District. Edmunds GovTech specializes in technology solutions to local governments. They have been in business since 1971 and serve over 1,900 small and mid-sized municipalities, counties and government agencies. They provide a feature-rich solution that will meet all of our service needs and desires, and their software system is under continuous development and improvement based on feedback from their customers. All five of Edmunds GovTech's references were independently verified and each reported high levels of satisfaction with the Edmunds CIS solution. The total cost for their software solution, computed as a 10-year cost of ownership, was the lowest of the 9 firms considered. In fact, our annual software costs will be 15% (\$4,073) less than our present annual costs.

Edmunds also brings partners, with established integrations, to provide appealing pricing for the payment services transaction fees and print & mail services, relative to our present provider and the independent providers that responded to the RFP. Projected annual transaction costs through Edmunds GovTech's payment services provider, FIS Global (a global leader in financial services), are estimated to be approximately 8% (\$9,000) less than our present annual costs. The charges for the print and mail services through Edmunds GovTech's integration partner, Professional Mail Services, Inc. are similar to our present costs.

The proposal submitted by Edmunds GovTech was the highest ranked proposal (see table below). The solution proposed by Edmunds GovTech provides all of the services, features, functionality and continuous improvement we are seeking. Their references, reputation and extensive experience are all verified and excellent, and the pricing of the solution is appealing. Thus, the Edmunds solution is deemed the best value for the District.

Therefore, staff recommend the following motion:

“THAT THE DISTRICT GOVERNING BOARD authorize the Executive Director to execute the attached sales agreement as a continuing contract with Edmunds GovTech in accordance with their submittal to RFP-22-004-00114 and authorize a purchase order to Edmunds GovTech in the amount of \$66,337.00.

Please note: As we near completion of software implementation with Edmunds GovTech staff will return to the Board seeking authorization of separate purchase orders for projected fiscal year costs associated with transaction fees (FIS Global) and printing and mailing charges (Professional Mail Services).

Final vendor ranking for Utility Information & Billing System, Payment Processing Services, and Printing and Mailing Services as provided by the Selection Committee.

Loxahatchee River District RFP 22-004-00114
 Utility Customer Information & Billing System
 Payment Processing Services
 Printing and Mailing Services

Final Ranking
 February 4, 2022

Category	Company	Rank
Customer Information & Billing Systems <i>Including Partnerships</i>	Edmunds	1
	MuniLink	2
	BS&A	3
	Tyler	4
	Starnik	5
	Enterprise Solutions	6
	Cogsdale	7
	Ablesoft	8
	Util360	9
Payments Only	Invoice Cloud	1
	First Billing	2
	PayNearMe	2
Print/Mail Only	Arista	1
	Infosend	2

Based these scores, the Selection Committee intends to recommend **Edmunds GovTech** to the Governing Board.

The Edmunds solution includes all services.