

Louisville Water Company
RFP 13-101 Print Utility Mail Services
Evaluation Summary
Corrected 4/11/2014

	Utilitec	Kubra	Billtrust	Pinnacle	Vertex	Novitex	Allison	United Mail
Round 1 - Minimum Requirements	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
Round 2 - Technical Review - 100%	73	70	66	66	58	49	46	42

Shortlist Created from Round 2

Round 3 - Contractor Demos - (60%)	47	32	34	40	
Round 4 - Cost Proposal (40%)	28	39	36	30	
Total Score - Rounds 3 & 4	75	71	70	70	

Scores in light orange changed after corrections.

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Round One - Pass/Fail

Round 1 - Minimum Requirements Pass/Fail	Allison (2)	Billtrust (2)	Kubra	Novitex	Pinnacle	United Mail (2)	Utilitec	Vertex (2)
Proposer must provide proof firm has been in business for 5 years or more and provide 3 years of audited financials. (1)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass
Proposer must provide 2 examples where proposed solution to production operation is still working today and where the company has 200,000 active customers.								
Proposer must be able to begin work within 30 days of notification.								
Proposer can supply authoring tool compatible with C, C, & B to design, create billing statements and other mailings.								
Proposer shall provide electronic storage for invoices								
Proposer can provide option to turn-off hard copies.								
Proposer shall provide avenue for notification to customers.								

(1) Requirement for audited financials waived. Financials were returned to Proposer.

(2) Allison, BillTrust, United Mail, and Vertex, were contacted for clarification of customers and number of billings.

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Round Two - Technical Evaluation- 100%

PROPOSERS NAME:		Allison Payment			BillTrust		Kubra Data		Novitex		Pinnacle		United Mail		Utilitec		Vertex	
		(A) POINT VALUE	(B) RATING (1-5)	SCORE B/5*A	(B) RATING (1-5)	SCORE B/5*A	(B) RATING (1-5)	SCORE B/5*A	(B) RATING (1-5)	SCORE B/5*A	(B) RATING (1-5)	SCORE B/5*A	(B) RATING (1-5)	SCORE B/5*A	(B) RATING (1-5)	SCORE B/5*A	(B) RATING (1-5)	SCORE B/5*A
A	Print and Insertion	100	2	40	3	60	4	80	3	60	3	60	2	40	4	80	4	80
B	Print Production Capabilities	100	2	40	4	80	4	80	2	40	3	60	2	40	4	80	3	60
C	Review and Certification	25	2	10	4	20	3	15	2	10	3	15	2	10	4	20	3	15
D	Systems	50	3	30	4	40	3	30	2	20	3	30	2	20	4	40	3	30
E	Procurement and Inventory Management	50	2	20	3	30	2	20	3	30	3	30	2	20	3	30	2	20
F	Mail Processing	20	3	12	3	12	4	16	2	8	4	16	3	12	4	16	4	16
G	Archival Services	25	3	15	3	15	4	20	2	10	3	15	3	15	4	20	3	15
H	Electronic Presentment	50	3	30	4	40	3	30	1	10	3	30	2	20	3	30	2	20
I	Data Transmission/Communication	100	3	60	4	80	3	60	3	60	3	60	3	60	3	60	3	60
J	Service Interruption and Disaster Recovery Services	25	2	10	3	15	4	20	1	5	4	20	1	5	3	15	3	15
K	Third Party Services	50	4	40	4	40	4	40	2	20	4	40	2	20	4	40	1	10
L	Project Staffing	50	2	20	4	40	2	20	2	20	3	30	2	20	4	40	2	20
M	Implementation and Testing Experience	120	1	24	2	48	4	96	4	96	4	96	1	24	4	96	3	72
N	Implementation and Testing Plan	10	2	4	4	8	4	8	1	2	3	6	1	2	4	8	4	8
O	Training Plan	25	1	5	3	15	4	20	3	15	3	15	3	15	3	15	4	20
P	Maintenance and Support	100	3	60	3	60	4	80	2	40	3	60	2	40	3	60	3	60
Q	System Performance and Availability	100	2	40	3	60	3	60	2	40	4	80	3	60	4	80	3	60
R	Payment Remittance	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
S	AS-400 Bill Processing	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Total Points	1000		460		663		695		486		663		423		730		581
	Points Awarded	100		46		66		70		49		66		42		73		58

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Round Three - Scripted Demonstrations - 60%

		Pinnacle		Billtrust		Utilitec		Kubra	
		Score (1-5)	Points Awarded	Score (1-5)	Points Awarded	Score (1-5)	Points Awarded	Score (1-5)	Points Awarded
A. Authoring Tool - Design, create and print bill messages	30%								
1. Design, create and print letters, notices, postcards, (including ad-hoc items)									
2. Change format and fonts on bill (graphs, charts, etc.)									
3. Setup for specific customer communications									
4. Demonstrate ability to present bills/documents to customers in other languages.		3	18	3	18	4	24	2	12
5. Security setup for authorized users only and approval process.									
6. Upload, place, name, configure and manage images and banner ads supplied by LWC									
7. Supplier capabilities to present images supplied for LWC based on configuration of accounts and defined criteria. (printed and e-billing accounts)									
B. System Reports and or Status Updates	5%								
1. Daily production status (e.g. Number of bills, letters, and notices generated)									
2. Amount of postage paid to date with breakdown by document ID for specific piece.		3	3	3	3	3	3	4	4
3. Other ongoing charges									
4. Confirmation to LWC that print files were received and estimated time they will be processed									

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			Pinnacle		Billtrust		Utilitec		Kubra	
		%	Score (1-5)	Points Awarded	Score (1-5)	Points Awarded	Score (1-5)	Points Awarded	Score (1-5)	Points Awarded
C.	System Support	15%								
	1. Installation prior to CC&B implementation for testing purposes, convert Oracle CC&B file to bill image and/or customer letter.		4	12	3	9	4	12	3	9
	2. Describe the capability to provide 24*7 system support and maintenance of the Data Center that houses electronic printing.									
	3. Describe the back-up processes for disaster recovery and transition process.									
D.	Document Management	20%								
	1. Search for bills/correspondence based on user defined criteria (i.e., for re-distribution via email/fax/mail on customer request).		3	12	2	8	4	16	3	12
	2. Hold print of bill(s) based on user defined criteria									
	3. Security setup for authorized users only									
	4. Presentation of bill, letter, notice electronically									
	5. Presentation of SMS Text or Email to Customer									
	6. Discuss process and show examples of bill inserts that are sent to e-billing customers.									

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		Pinnacle		Billtrust		Utilitec		Kubra	
		Score (1-5)	Points Awarded	Score (1-5)	Points Awarded	Score (1-5)	Points Awarded	Score (1-5)	Points Awarded
E. Project Management									
	1. Describe your approach to managing a project such as this								
	2. Provide a sample implementation plan								
	3. Provide an organization chart describing the project team you supply. Describe roles and responsibilities for each person and identify if the resource will be full or part time.								
	4. What roles do you recommend on the LWC side of the project?								
	5. What would be the estimated time after contract signing to transition to the vendor's services for printing, inserting and mailing bills, statements, notices?	3	6	3	6	4	8	2	4
	6. Once in production will you dedicate staff members to the LWC account?								
	7. Provide titles, roles, and responsibilities of your staff that would be supporting LWC post go-live.								
	8. What is the process to escalate problems?								
	10%								
F. System Interface									
	1. Finalize bill extract file and transfer protocol.								
	2. Process work flow and integration for paperless/e-billing, payments, document exchange.								
	3. Discuss preferred enrollment process to move customers from paper to e-billing.								
	20%	4	16	3	12	4	16	3	12
	Total Points out of 100		67		56		79		53
	Total Score (60% weight)		40.2		33.6		47.4		31.8

1. Phase I - One-Time Costs (10%):

A. Implementation Costs

Duration 1.5 - 2 years during CC&B Implementation

PROPOSERS:		Billtrust	Kubra	Pinnacle	Utilitec
		Total Cost	Total Cost	Total Cost	Total Cost
1	Analysis	\$0.00	Waived		
2	Set Up	\$0.00	Waived		
3	Configuration	\$0.00	Waived		
4	Extract File Mapping	\$0.00	Waived		
5	Interfaces	\$0.00	Waived		
6	Testing	\$0.00	Waived		
7	Reports	\$0.00	Waived		
8	Other	\$0.00	Waived	\$25,000.00	\$9,500.00
Total - Not to Exceed		\$0.00	\$0.00	\$25,000.00	\$9,500.00

B. Template Development / Design:

	Estimated Quantity	Unit Cost	Total Cost	Estimated Quantity	Unit Cost	Total Cost	Estimated Quantity	Unit Cost	Total Cost	Estimated Quantity	Unit Cost	Total Cost
1	Bill	3+ each	\$0.00	\$0.00	3+ each	waived	3+ each	\$1,000.00	\$3,000.00	3+ each		
2	Letters / Notices	90 each	\$0.00	\$0.00	90 each	waived	90 each	\$50.00	\$4,500.00	90 each		
3	Postcards	10 each	\$0.00	\$0.00	10 each	waived	10 each	\$50.00	\$500.00	10 each		
4	Reports	2 each	\$0.00	\$0.00	2 each	waived	2 each	\$50.00	\$100.00	2 each		
5	Redesign of existing templates	5 each	\$0.00	\$0.00	5 each		5 each	\$1,000.00	\$5,000.00	5 each		
Total				\$0.00		\$0.00			\$13,100.00			\$0.00

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Round Four - Cost Proposals - 40%
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PROPOSERS:	Billtrust	Kubra	Pinnacle	Utilitec
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C. Authoring /Document Management System Related Costs (If Applicable):

Price the complete authoring tool for the solution you have proposed.

	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost
1 Initial Set-up Charge		\$0.00	\$0.00			waived	1	2500	\$2,500.00			
2 Licensing		\$0.00	\$0.00			N/A	12	250	\$3,000.00			\$2,500.00
3 Other:		\$0.00	\$0.00			N/A						
4												
5												
6												
Total			\$0.00			\$0.00			\$5,500.00			\$2,500.00

D. Expense Related Costs:

List the anticipated expenses to install and support this solution

Fee Type	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost
1 Use# of trips as Quantity			\$0.00			\$0.00						
2 Other:			\$0.00			\$0.00						
Total - Not to Exceed			\$0.00			\$0.00			\$0.00			\$0.00

E. Other One-Time Fees or Expenses:

List any other one-time fees and expenses associated with your solution

Fee Type	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost	Quantity	Unit Cost	Total Cost
1 Training Manuals			\$0.00			waived						
2 Documentation			\$0.00			waived			INCL			
3 Other			\$0.00			waived						
Not to Exceed			\$0.00			\$0.00			\$0.00			\$0.00
Phase I Total Estimated Cost			\$0.00			\$0.00			\$43,600.00			\$12,000.00
Phase I Total Points		10			10			0			0	

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2. Phase II - Ongoing Costs: (30%) (Cost to be based on estimated annual volumes)

A. Printing and Inserting. The Contractor shall utilize equipment and

PROPOSERS:	Billtrust (1)			Kubra (2)			Pinnacle (1)			Utilitec (3)		
	Unit	Unit Price		Unit	Unit Price		Unit	Unit Price		Unit	Unit Price	
1 Bill Printing	Per Page	\$0.05		Per Page	\$0.013		Per Page	0.03		Per Page		
2 Notice Printing	Per Page	\$0.05		Per Page	\$0.013		Per Page	0.02		Per Page		
3 Letter Printing	Per Page	\$0.05		Per Page	\$0.013		Per Page	0.02		Per Page		
4 Postcard Printing(1)	Per Page	\$0.07		Per Page	\$0.013		Per Page	0.04		Per Page		
5 Envelopes	Each	\$0.02		Each	\$0.01712		Each	0.017		Each		
6 Automated Insertion	Each	\$0.02		Each	\$0.021		Each	0.01		Each	\$15,725	
7 Other			BRE Envelope	Each	\$0.0159	OPTIONAL Digital Color		0.04				
8			Bill/Notice Paper	Per Page	\$0.01498							
9			Letter Paper	Per Page	\$0.01472							
10			Pre-Processing	Per Page	\$0.005							
Subtotal					\$0.11			\$0.0740			\$0.0850	
Annual Costs					\$244,200.00			\$164,280.00			\$188,700	

(1) Items highlighted in green were used to calculate the unit cost of bill printing, bill paper, two envelopes, processing and insertion.

(2) Items highlighted in green were used to calculate the unit cost of bill printing, bill paper, envelope & BRE envelope, processing and insertion.

(3) Utilitec provided a monthly cost and provided a clarification sheet indicating \$.085 each for printing and inserting which includes: data processing, laser imaging, letterhead, and envelopes.

B. Postage. The contractor shall charge LWC the "Then current"/best possible

		Estimated Unit Price		Estimated Unit Price		Estimated Unit Price		Estimated Unit Price
1	Single Page	0.035 (4) used .35		\$0.36 (5-Digit)		0.36		
2	Multi-Page	0.035 (4) used .35		\$0.36 (5-Digit)		0.36		
3	Other		3-Digit/AAD	\$0.38				0.36
4			Postcard-5 Digit	\$0.23				
5			Postcard -3 Digit	\$0.25				
6				Postage is Pass Thru				
Postage cost used in estimating annual expense				\$0.36		\$0.36		\$0.36
Annual Costs				\$777,000.00		\$799,200.00		\$799,200.00

(4) Apparent error in placement of decimal for cost of postage. Therefore, Buyer, made correction and used .35 as the postage cost.

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PROPOSERS:	Billtrust	Kubra	Pinnacle	Utilitec
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C. Image Archiving.

		Annual Cost		Annual Cost		Annual Cost		Annual Cost
1	Bills: Electronic Image Archive Generation and Hosting	\$22,000.00		\$9,000.00		\$44,400.00		
2	Bills: Additional Archive Image Hosting			N/A		INCL		
3	Bills: Set-Up Costs			\$0.00				
4	Notices: Electronic Image Archive Generation and Hosting	1500		\$600.00				
5	Notices: Additional Archive Image Hosting			N/A				
6	Notices: Set-up Costs			\$0.00				
7	Letters: Electronic Image Archive Generation and Hosting	3960		\$1,200.00				
8	Letters: Additional Archive Image Hosting			N/A				
9	Letters: Set-up Costs			\$0.00				
10	Other							\$ 44,400.00 (4)
Total Cost		\$27,460.00		\$10,800.00		\$44,400.00		\$44,400.00

(4) - Utilitec entered pricing under "other" and provided clarification with proposal that the cost includes: Bills, notices, and letters at a fee of \$.02 per image and storage for 1-year.

D. Electronic Presentment.

		Unit	Total		Unit	Total		Unit	Total		Unit	Total
1	Bills: Notification (Text Only)	Each			Each			Each	0.03 (5a)		Each	
2	Bills: Notification (with attachment)	Each	0.12		Each			Each	0.15		Each	
3	Bills: Print Preview	Each	0.12		Each			Each	N/C		Each	
4	Notices: Notification (text only)	Each			Each			Each	0.03		Each	
5	Notices: Notification (with attachment)	Each	0.12		Each			Each	0.15		Each	

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PROPOSERS:		Billtrust			Kubra			Pinnacle			Utilitec		
6	Notices: Print Preview		Each	0.12		Each			Each	N/C		Each	
7	Letters: Notification (Text Only)		Each	0		Each			Each	0.03		Each	
8	Letters: Notification (with attachments)		Each	0.12		Each			Each	0.15		Each	
9	Letters: Print Preview		Each	0.12		Each			Each	N/C		Each	
10	Other:											\$ 0.075 (5)	
11					Notifications	Each	\$0.00						
12					Ebill Present	On First view	\$0.08						
Unit Cost				\$0.12			\$0.08			\$0.03		\$0.075	
Annual Costs				\$266,400.00			\$177,600.00			\$66,600.00		\$166,500.00	

(5) Utilitec entered pricing under "other" and provided clarification with proposal that the cost includes: Fees to present bills (PDFs) at \$.075 sent to enrolled e-billing customers.

(5a) Pinnacle provided clarification that the bill notification contained link to the customer statement and there was no additional cost for the customer to view the statement.

E. Services Related.

		Annual Cost		Annual Cost		Annual Cost		Annual Cost
1	Inventory Management and Storage	\$0.00		\$0.00		N/C		
2	Third-Party presort and commingle services	\$0.00		N/A		\$.02 (If required) (6)		
3	Other:							0.015 (6) (7)
Subtotal		\$0.00		\$0.00		\$0.00		\$0.00

(6) LWC sends mail in batches and does not require third-party presort and commingle services.

(7) Utilitec entered pricing under "other" and provided clarification with proposal that the fee includes third-party presort and commingle services.

F. Authoring/Document Management System Related Costs (If applicable).

Price the complete authoring tool for the solution you have proposed.

Fee Type - Authoring Tool		Unit	Unit Price	Unit	Unit Price	Unit	Unit Price	Unit	Unit Price
1	Version Upgrades	Each	\$0.00	Each	\$0.00	Each	Included in License Fee	Each	
2	Add-on modules (List Below)	Each	\$0.00	Each	\$0.00	Each	N/C	Each	
Other:									
Subtotal			\$0.00		\$0.00		\$0.00		\$0.00

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PROPOSERS:		Billtrust		Kubra		Pinnacle		Utilitec	
3. Other Cost & services necessary to provide the solution to LWC (not entered elsewhere)									
Description	Unit	Unit Price	Unit	Unit Price	Unit	Unit Price	Unit	Unit Price	Unit Price
N/A							N/A		

4. Annual Maintenance & Support (If applicable after implementation.)

	Description	Price per year	Price per year	Price per year	Price per year
1	First Year Maintenance	\$0.00	N/A	\$10,500.00	\$2,500.00
2	Second Year Maintenance	\$0.00	N/A	\$10,500.00	\$2,500.00
3	Third Year Maintenance	\$0.00	N/A	\$10,500.00	\$2,500.00
4	Fourth Year Maintenance	\$0.00	N/A	\$10,500.00	\$2,500.00
5	Fifth Year Maintenance	\$0.00	N/A	\$10,500.00	\$2,500.00
	Total Maintenance Fee for 5 Years.	\$0.00	\$0.00	\$52,500.00 (9)	\$12,500.00 (8)

(8) Utilitec entered \$2,500 licensing fee under section C: Authoring/Document Management for one-time licensing cost. Utilitec provided clarification with proposal indicating that the fee is a yearly licensing and maintenance fee. Utilitec did not enter any on-going maintenance cost on their proposal, however due to clarification, LWC Buyer entered the on-going fee for annual Maintenance & Support system for the cost evaluation.

(9) Pinnacle entered \$7,500 on cost proposal for item #4 Annual Maintenance & Support. After discussion with Pinnacle it appears the one time fees entered for licensing is on-going and is an annual fee. Therefore, \$3,000 was added to the ongoing annual maintenance and support, therefore increasing Pinnacles cost to \$10,500 a year.

5. Optional Services Offered (e.g. payment remittance & processing):

Description	Unit	Unit Price	Unit	Unit Price	Unit	Unit Price	Unit	Unit Price
Online Bill Payment			Per payment	\$0.10	Credit Card		0.12	
			KUBRA EZ-Pay	\$1.25	ACH Pay	Each Transact	0.12	
			I-Connect	\$0.25				
			FISERV	\$0.01				
Phase II Total Costs (Not including Optional Costs)		\$1,315,060.00		\$1,180,740.00		\$1,126,980.00		\$1,211,300.00
Phase II Total Points		26		29		30		28
Round Four Total Points		36		39		30		28

Items in yellow were adjusted (corrected).

Items in light orange total calculation changed after adjustments