



### AGENDA ITEM REPORT

**DATE:** October 1, 2019  
**DEPARTMENT:** Visitor and Convention Bureau  
**REQUESTER:** Tamara Pigott  
**TITLE:** Award Contract for Mail Fulfillment

#### I. MOTION REQUESTED

A) Award Request for Proposal No. RFP190357RJD, Lee County Visitor & Convention Bureau Mail Fulfillment, to Southwest Direct, Inc. for mail fulfillment services for an initial term of two years, as approved in the department's annual adopted budget, in an amount not to exceed \$150,000.00. The contract can be renewed for up to three additional one periods. Any renewal term that results in an expenditure of \$100,000 or more annually will be brought back to the Board for consideration.

B) Authorize the Chair to execute the contract documents on behalf of the Board of County Commissioners.

#### II. ITEM SUMMARY

Awards a contract to the sole bidder, Southwest Direct, Inc., for data collection, domestic and international shipping services, receipt and storage of collateral material and mail fulfillment. The agreement is for a two-year period in an amount not to exceed \$150,000 annually. The contract can be renewed up to three additional one periods. Total expenditures for these services in Fiscal Year 2017-2018 were approximately \$113,730.66.

#### III. BACKGROUND AND IMPLICATIONS OF ACTION

##### A) Board Action and Other History

Procurement Management obtained proposals for the project known as Request for Proposal No. RFP190357RJD, Lee County Visitor & Convention Bureau Mail Fulfillment. On the solicitation deadline of July 12, 2019, Procurement Management received one submittal.

An evaluation meeting was held on August 2, 2019, during which the Evaluation Committee considered criteria as listed in the solicitation request including such items as capacity and scope of work, project team, company relevant experience and financial stability, and detailed proposal. Based on the information submitted by the proposers, the Committee reached a consensus to negotiate with and recommend the award of a contract to Southwest Direct, Inc., for an initial two-year period in an amount not to exceed \$150,000.

The contract can be renewed up to three additional one periods, upon the agreement of both parties.

Total expenditures for these services for Fiscal Year 2017-2018 were \$113,730.66.

##### B) Policy Issues

##### C) BoCC Goals

Strategic Priority – Tourism

##### D) Analysis

Southwest Direct, Inc. provides data collection and mail fulfillment for the Visitor and Convention Bureau.

On August 2, 2019, the evaluation committee unanimously recommended the Board award the VCB contract to the sole bidder for data collection and mail fulfillment to Southwest Direct, Inc., which is the current vendor since 2016.

Founded in 1988, Southwest Direct, Inc. is a locally operated full-service mail production facility offering statement design, database management, and full color printing digital imaging, statement processing, mailing services and fulfillment.

In addition to mail fulfillment Southwest Direct provides the following services to Lee County VCB.

- Shipping services to domestic and international vendors, trade shows (over 100 shows annually), welcome centers, AAA offices, etc.
- Receives and stores VCB collateral annually; provides reporting on returned collateral and inventory.
- Downloads digital leads for fulfillment as a result of advertising from VCB advertising agency of record.

##### E) Options

#### IV. FINANCIAL INFORMATION

A)	Current year dollar amount of item:	\$150,000
B)	Is this item approved in the current budget?	Yes
C)	Is this a revenue or expense item?	Expense

D)	Is this Discretionary or Mandatory?	Discretionary
E)	Will this item impact future budgets? If yes, please include reasons in III(D) above.	Yes
F)	Fund: Program: VCB Project: Account Strings: HB5520317400.503490.119 HB103	
G)	Fund Type?	Enterprise, Other: Tourist Development Tax
H)	Comments: Expenditures will be on an as needed basis, as approved in the department's annual adopted budget, in an amount not to exceed \$150,000 annually.	

**V. RECOMMENDATION**

Approve

**VI. TIMING/IMPLEMENTATION****VII. FOLLOW UP****ATTACHMENTS:**

Description

[Proposed Contract](#)

Upload Date

9/11/2019

Type

Contract

**REVIEWERS:**

Department	Reviewer	Action	Date
Visitor and Convention Bureau	Turner, Nicole	Approved	9/11/2019 - 8:16 AM
Visitor and Convention Bureau	Pigott, Tamara	Approved	9/13/2019 - 9:03 AM
Budget Services	Guttery, Angela	Approved	9/16/2019 - 4:06 PM
Budget Services	Winton, Peter	Approved	9/17/2019 - 8:26 AM
County Attorney	Swindle, Amanda	Approved	9/18/2019 - 1:30 PM
County Manager	Salyer, Glen	Approved	9/25/2019 - 9:45 AM