



**COUNTY OF SAN MATEO**  
Inter-Departmental Correspondence  
Treasurer-Tax Collector



**Date:** August 25, 2016  
**Board Meeting Date:** September 6, 2016  
**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors

**From:** Sandie Arnott, Treasurer-Tax Collector

**Subject:** Agreement with Infosend, Inc.

**RECOMMENDATION:**

Adopt a resolution authorizing an agreement with Infosend, Inc. to provide printing and mailing of property tax bills for the Tax Collector, for the term beginning September 15, 2016 through September 14, 2019 in an amount not to exceed \$900,000.

**BACKGROUND:**

San Mateo County is the 14<sup>th</sup> largest County in the State of California, with a population of approximately 750,000. The Tax Collector is responsible for printing and mailing over 271,000 bills annually. The Tax Collector is seeking vendor proposals for a printing and mailing solution that will maximize efficiencies, reduce costs, allow for annual changes to bills and invoices that improve written communications of amounts due, keep up with current technology, streamline the current processes, and will suggest changes to current processes to become more cost effective and lower overall postage costs.

**DISCUSSION:**

On April 29, 2016, the Tax Collector released a Request for Proposals (RFP) for printing and mailing of property tax bills. Proposals from four different vendors by the RFP close date of May 23, 2016 were received. After evaluation of the four proposals and on-site visits to the top two proposers, Infosend, Inc. was selected as the preferred vendor. This decision was made on the basis of their experience conducting required services, the completeness, depth and breadth of their proposal; the array of services offered and the cost-effectiveness of their fee schedule.

This agreement with Infosend, Inc. will provide printing and mailing services of the Tax Collector's property bills and notices accurately and in a timely manner. It is critical that each bill or other notice be processed correctly with the proper data and mailed by the assigned deadlines to ensure the efficient collection and deposit of revenues. The Tax

Collector currently operates under a legacy system, which generates and provides files in a .TXT format. Infosend, Inc. has the ability to receive data files conforming to the existing file formats, and use the data to print a variety of bills, notices, and letters. Additionally, Infosend has the ability to design and generate a bill that conforms to our current bill look and formatting standards. The Treasurer-Tax Collector is exploring opportunities to upgrade their system during the contract period, which may change the manner in which files will be delivered to the Contractor. Infosend is able to work with the Tax Collector to provide continuous services at the needs and IT data structures of the department evolve, enabling us to continue to meet our regulatory mailing requirements during any transitional periods.

The Tax Collector handles three primary types of property tax bills: annual Secured property tax statements, annual unsecured property tax statements, and monthly Supplemental property tax statements. The Tax Collector also generates various additional bill as needed, such as escape assessment bills, daily name/address change bills, twice yearly delinquent bills, and other bills as necessary. Additionally, the Tax Collector is responsible for generating annual Redemption notices and various Certified Mailings related to prior year taxes. Because of the different types of bills being sent, the Tax Collector may need printing and mailing services as often as daily, but is also looking for the ability to streamline and consolidate mailing to reduce postage and processing costs.

County Counsel has reviewed and approved the agreement and resolution as to form.

Utilizing a cost effective and efficient printing and mailing services contributes to the Shared Vision 2025 outcome of a Collaborative Community by enabling us to efficiently and effectively collecting the revenue needed to fund public services.

**PERFORMANCE MEASURE:**

Measure	FY 2015-16 Actual	FY 2016-17 Target
Cost Per Tax Bill	\$5.75	\$6
Average Number of Bills Printed	271,000	275,000

**FISCAL IMPACT:**

Funds for these services have been included in the Treasurer-Tax Collector's FY 2016-17 Recommended Budget. Similar arrangements will be made for future budget years.