



**MISSISSIPPI DEPARTMENT OF REVENUE**

# **EVALUATION SUMMARY REPORT**

**Request for Proposal  
# 3120001560**

**Forms Processing Services  
Outsource Mail and Data Processing**



### **Evaluation Committee Form**

**Title:** Forms Processing Services

**RFP Number:** #3120001560

**Evaluation Date:** November 8, 2018

The names of the members of the evaluation committee shall not be publically disclosed until their evaluation report as required under Section 3-203.16 is published (48 hours prior to the award). The members' names and job titles shall be made available to the public. Where evaluation committee members are not public employees, those members' names, educational and professional qualifications, and practical experience, that were the basis for the appointment, shall be made available to the public.

#### **EVALUATOR NAMES AND PROFESSIONAL TITLES:**

Drew Maddox, Chief Financial Officer

Kayla McKnight, Office Director, Admin Services

Mickey Yates, Chief Systems Information Officer

Frankie Lewis, Bureau Director, Data Processing

Sam Portera, Office Director, Deputy, Review Board & Policy

## **AWARDED VENDOR REPORT**

The submission of this report is in partial fulfillment of the transparency requirement as set forth by the Public Procurement Review Board in Section 3-204.04 of the Office of Personal Service Contract Review Rules and Regulations. On November 8, 2018, we evaluated proposals for the outsourcing of forms processing services for the Mississippi Department of Revenue. The following potential offerors submitted proposals for evaluation:

- 1. ClearView Digital Conversion, Inc.**
- 2. The Data Entry Company (TDEC)**
- 3. Exela Technologies, Inc.**

The award recommendation was based on the information provided in each proposal. The information below supports our decision for this recommendation. Our comments on the strengths and weaknesses were expounded upon in the individual rubric. After thorough evaluation and great consideration, we recommended that Exela be awarded the contract for forms processing services at a cost of \$4,108,152.

### **Awarded Vendor**

**Vendor Name: Exela Technologies, Inc.**

**Total Score: 86.5**

- **Overall**
  - Proposal was very thorough and exemplified the vendor's experience
  - References were honest about both strengths and weaknesses
  - Processes are proven, scalable, and detailed from other state tax entities

Below are additional strengths, provided by rubric areas, that resulted in Exela being chosen.

- **Technical Factors**
  - Demonstrated qualifications with past experience
  - Documented methodology for similar projects
- **Management Factors**
  - Provided multiple examples of tax specific experience
  - Business Continuity and Disaster Recovery Plans showed a wealth of in-house resources
  - Personnel qualifications were unmatched
- **Cost**
  - The budget provided was acceptable

### **Other Vendors**

**Vendor Name: ClearView Digital Conversion, Inc.**

**Total Score: 85**

- **Overall**
  - Lowest price
  - Experience was not as comprehensive and did not include tax specific agencies

- Fewer resources

Despite having the lowest price, the proposal did not demonstrate that ClearView Digital familiar enough with the work specified in the RFP. Additionally, our scoring rubric found these additional weaknesses:

- **Technical Factors**
  - Qualifications and methodologies provided were limited in scope
- **Management Factors**
  - No tax industry experience
  - Limited in-house resources
  - Financials were not as thorough as the awarded vendor

**Vendor Name: The Data Entry Company (TDEC)**

**Total Score: non-responsive**

This proposal was deemed non-responsive after DOR was unable to contact at least two references as required by the terms of the RFP. As a result, the proposal was rejected from the evaluation process due to its non-responsive nature. MDOR provided notification of this rejection to the vendor as required by 3-301.05.4.