

State of Maine Procurement Justification Form

This form must accompany all contract requests and sole source requisitions (RQS) over \$5,000 submitted to the Division of Procurement Services.

INSTRUCTIONS: Please provide the requested information in the white spaces below. All responses (except signatures) must be typed; no hand-written forms will be accepted. See the guidance document posted with this form on the Division of Procurement Services website (Forms page) for additional instructions.

PART I: OVERVIEW				
Department Office/Division/Program:	Department of Administrative and Financial Services, Bureau of Revenue Services			
Department Contract Administrator or Grant Coordinator:	Rhonda Ainslie			
(If applicable) Department Reference #:				
Amount: (Contract/Amendment/Grant)	\$ 200,592.75	Advantage CT / RQS #:		
CONTRACT	Proposed Start Date:	April 1, 2021	Proposed End Date:	March 31, 2024
AMENDMENT	Original Start Date:		Effective Date:	
	Previous End Date:		New End Date:	
GRANT	Project Start Date:		Grant Start Date:	
	Project End Date:		Grant End Date:	
Vendor/Provider/Grantee Name, City, State:	Pitney Bowes Software, Inc. 350 Jordan Road Troy, NY 12180			
Brief Description of Goods/Services/Grant:	License renewal of DOC1 software, used by MERITS to create notices and other taxpayer documents.			

PART II: JUSTIFICATION FOR VENDOR SELECTION			
Mark an "X" before the justification(s) that applies to this request. (Check all that apply.)			
	A. Competitive Process		G. Grant
	B. Amendment		H. State Statute/Agency Directed
x	C. Single Source/Unique Vendor		I. Federal Agency Directed
	D. Proprietary/Copyright/Patents		J. Willing and Qualified
	E. Emergency		K. Client Choice
	F. University Cooperative Project		L. Other Authorization

PART III: SUPPLEMENTAL INFORMATION
Please respond to ALL of the following:
1. Provide a more detailed description and explain the need for the goods, services or grant to supplement the response in Part I.

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PART III: SUPPLEMENTAL INFORMATION

Maine Revenue Services (MRS) uses a mainframe computer system entitled Maine Revenue Integrated Tax System (MERITS) for tracking and maintaining tax records. During the initial conversion of MERITS from the old system, EngageOne (DOC1) software was integrated into the system to create notices. The software creates over 200 different notices for MRS based on variables provided by MERITS. The software also creates the reports for printing the notices for mailing and archives the notices to Fortis (a product used by MRS for return and payment filing image retention). The functionality of the software within the system is critical to MRS.

2. Provide a brief justification for the selected vendor to supplement the response in Part II.

Creating the number and variety of notices that MRS provides to taxpayers is a complex and extensive task. It would be impossible for the MaineIT Application Development staff to maintain all these notices and keep everything up to date and running in an efficient manner. The software system from Pitney Bowes is a document creation and management system that works with the business rules and document text libraries to allow for efficient creation of notices with minimum intervention from both MaineIT and MRS staff.

The EngageOne programming has been customized by MRS and MaineIT and has been thoroughly tested by the departments. The software has been integrated into multiple other programs used by MRS. This software creates notices sent out to the public which must be accurate. It is critical for MRS that the creation and printing of notices remains uninterrupted. By continuing to use and maintain the EngageOne software this function is accomplished.

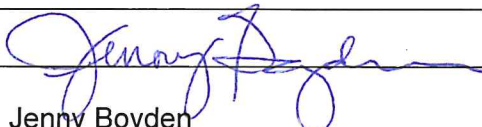
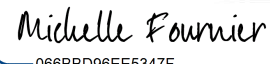
3. Explain how the negotiated costs or rates are fair and reasonable; or how the funding was allocated to grantee.

Based on MRS research the annual maintenance fee falls within industry guidelines. By committing to a three-year agreement, the fee is locked in at the current rate, avoiding the standard annual increase of 3% to 5%. Additionally, at this time it would be cost prohibitive to disconnect the Engage One software from MERITS and redevelop and test the over 200 notices that EngageOne software currently provides to MRS.

4. Describe the plan for future competition for the goods or services.

MRS and MaineIT will continue to monitor the EngageOne software. EngageOne has been integrated into MERITS and customized by MRS. To integrate new software would be expensive and put a large strain on MRS and MaineIT staffing resources. The software itself will become unnecessary when the agency implements its new holistic system.

PART IV: APPROVALS

Signature of requesting Department's Commissioner (or designee):	<i>By signing below, I signify that I approve of this procurement request.</i>		
			
Printed Name:	Jenny Boyden <small>DocuSigned by:</small>	Date:	10-27-2020
Signature of DAFS Procurement Official:			
	<small>066BBD96EE5347E...</small>		
Printed Name:	Michelle Fournier	Date:	10/30/2020