



## DEPARTMENT OF PROCUREMENT SERVICES NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION

Complete this cover form and the **Non-Competitive Procurement Application Worksheet** in detail. Refer to the page entitled "Instructions for Non-Competitive Procurement Application" for completing this application in accordance with its policy regarding NCRB. Complete "other" subject area if additional information is needed. Subject areas must be fully completed and responses merely referencing attachments will not be accepted and will be immediately rejected.

Department	Originator Name	Telephone	Date	Signature of Application Author
DoIT Contract Liaison Judy Mims	Sunil Thomas Email Contract Liaison judith.mims@cityofchicago.org	312-744-3960 Telephone 312-742-1817	9/5/2014	

**List Name of NCRB Attendees/Department**

Carmen Sandu  
Judith Mims  
Sunil Thomas

Request NCRB review be conducted for the product(s) and/or service(s) described herein.

**Company:** Infor Public Sector

Contact Person:	Phone:	Email:
David Griffin	916-436-6644	dgriffin@infor.com

**Project Description:** IT software and professional services for Inspection and permitting system. Request for time extension and vendor limit increase.

**This is a request for:**

New Contract                       Amendment / Modification

**Contract Type**                      **Type of Modification**

Blanket Agreement    Term: \_\_\_\_ (# of mo)               Time Extension               Vendor Limit Increase     Scope Change

Standard Agreement

Contract Number: 16761  
Specification Number: 61590  
Modification Number: \_\_\_\_\_

<p><b>Department Request Approval</b></p> <p style="text-align: right;"> 3/20/15</p> <p>DEPARTMENT HEAD OR DESIGNEE                      DATE</p> <p>Kevin Moran                      PRINT NAME</p>	<p><b>Recommended Approval</b></p> <p style="text-align: right;"> 4-29-15</p> <p>BOARD CHAIRPERSON                      DATE</p> <p>Rich Butler                      PRINT NAME</p>
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(FOR NCRB USE ONLY)

Recommend Approval/Date: 4-28-15

Return to Department/Date: \_\_\_\_\_

Rejected/Date: \_\_\_\_\_

4/28/15

Approved                       Rejected

APR 29 2015

CHIEF PROCUREMENT OFFICER                      DATE



**DEPARTMENT OF PROCUREMENT SERVICES  
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION  
JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET**

All applicable information on this worksheet must be addressed using each question found on the "Instructions for Non-Competitive Procurement Application" in this application.

**Justification for Non-Competitive Procurement Worksheet**

**PROCUREMENT HISTORY**

1. City procured Hansen product licenses and professional services through a 5 year contract (16761) to implement Hansen 8 for Buildings, Department of Transportation, Fire Prevention Bureau and Department of Environment (Currently part of CDPH). Infor professional services have been used to implement inspections for Fire Prevention Bureau, Back office and online permitting functionality for Department of Environment (Currently part of CDPH) and Inspections for Department of Planning. Vendor is in the process of configuring Hansen 8, Mobile and Web for Department of Buildings and Department of Transportation.
2. This is a continuation of previous procurement from same source. On February 18, 2009, Hansen Information Technology, was awarded a 5 year contract (16761) for Hansen 8 license, implementation, maintenance and support. On January 9, 2012, the contract was amended to add capability to purchase Enterprise Asset Management(EAM) and/or Hansen 8 Asset licenses. On May 30, 2014, the contract was extended for 1 year to support implementation of Hansen 8
3. Infor Public Sector is the sole provider of support and implementation services of their proprietary software.
4. No research was done to identify other sources to complete ongoing projects was done. There is additional cost to City restarting projects using new vendor This is a request to extend current vendor contract to complete projects that are in progress.
5. An RFP will be published to secure services to expand Hansen 8 implementation. A potential exists to segregate maintenance/support from implementation services.
6. Yes. Future competitive bidding is possible.

**ESTIMATED COST**

1. \$6,080,225.00 needs to be added the vendor limit increase to cover Hansen 7/8 license, CDR Billing license, Software implementation and support for a period from 1/1/2015 through 12/31/2015 and Implementation of one-stop functionality on web for customers. The following are the funding sources:  

Hansen annual onsite support	\$3,168,425 - 14-0C46-062005-3421-34021401
Hansen annual maintenance	\$ 698,000 - 100-06-2005-0149-0149
CDR Billing (Services and Maintenance)	\$ 525,000 - 013.0C42.P062005.5439.P22000.T.54037401.000000.T.T
One-stop shop / wizard implementation	\$1,688,800 -013.0C42.P062005.5438.P22000.T.54036401.000000.T.T
2. Annual estimated cost for professional services is \$3,168,425.00 and product license is \$ 698,000 (Hanan 7/8 license is 698,000 and CDR Billing license is 40,000). One time cost of one-stop functionality is \$1,688,800.00.
3. Cost estimate was based on professional services cost listed in contract (16761) for optional period and annual license fees associated with Hansen 7/8.
4. Based on enterprise license for Hansen 8 , City is in the process of consolidation/replacing number of permitting and inspection systems thus creating cost savings in terms of license, hardware and support.
5. The annual maintenance cost is based on contract (16761) for optional period (1/1/2015 - 12/31/2015). The estimated cost covers license, implementation and support of Hansen 8 application across the City.

**SCHEDULE REQUIREMENTS**



**DEPARTMENT OF PROCUREMENT SERVICES  
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION  
JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET**

1. The schedule is primarily driven by Mayor's Paperless Initiative which has to be completed by end of 2016.
2. City intends to procure Hansen 8 product licenses and professional services using this contract. Drawing or any specific specification does not apply to components.
3. Vendor is in the process of implementing Hansen 8 for number of City departments and it is essential that this contract be extended to complete those implementations.
4. Vendor is responsible for supporting current implementation of Hansen 8 at Fire Prevention and Public Health (P&I group) for permits and inspections. In addition vendor is supporting Hansen 7 that is critical for Department of Buildings operations.

**EXCLUSIVE OR UNIQUE CAPABILITY**

1. This contract extension is not intended for hiring a person or firm.
2. Yes. Hansen 8 is a product owned by Infor and using their personnel for implementation and support produces quality deliverables.
3. Vendor was responsible for implementing Hansen 7 in the City. It is critical and efficient to use vendor's knowledge on City's business process and their experience with their product (Hansen 8) to complete on going projects.
4. Infor is the owner of Hansen 8 product used by the City to support permitting and inspection functions across multiple departments.
5. Vendor has spent several years implementing and supporting Hansen 7/8 with City and has an extensive knowledge of City's business processes related to inspection and permitting.
6. N/A. This request is for the extension of professional services that was originally approved by the NCRB in 2009.. A new approval is needed from the NCRB for the extension of these services.
7. N/A. This request is for the extension of professional services to allow Vendor to complete on going projects that have been delayed due to funding issues.
8. The contract extension is to procure professional services to configure Hansen 8 product and product licenses.

**OTHER**

1. No additional supporting document is presented.



# DEPARTMENT OF PROCUREMENT SERVICES NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION INSTRUCTIONS FOR NON-COMPETITIVE PROCUREMENT APPLICATION

## INSTRUCTIONS FOR PREPARATION OF NON-COMPETITIVE PROCUREMENT APPLICATION

If a City Department has determined that the purchase of supplies, equipment, work and/or services cannot be done on a competitive basis, a justification must be prepared on this "Justification for Non-Competitive Procurement Application" in which procurement is requested on a or non-competitive basis in accordance with 65 ILCS 5/8-10-4 of the Illinois Compiled Statutes. Using this instruction sheet, all applicable information must be addressed on the worksheet. The information provided must be complete and in sufficient detail to allow for a decision to be made by the Non-Competitive Procurement Review Board. For Amendments, Modifications, describe in detail the change in terms of dollars, time period, scope of services, etc., its relationship to the original contract and the specific reasons for the change. Indicate both the original and the adjusted contract amount and/or expiration date with this change.

Attach a DPS Checklist and any other required documentation; the Board will not consider justification with incomplete information documentation or omissions.

### PROCUREMENT HISTORY

1. Describe the requirement and how it evolved from initial planning to its present status.
2. Is this a first time requirement or a continuation of previous procurement from the same source? If so, explain the procurement history.
3. Explain attempts made to competitively bid the requirement (attach copy of sources contacted).
4. Describe in detail all research done to find other sources; list other cities, companies in the industry, professional organizations contacted. List periodicals and other publications used as references.
5. Explain future procurement objectives. Is this a one-time request or will future requests be made for doing business with the same source?
6. Explain whether or not future competitive bidding is possible. If not, explain in detail.

### ESTIMATED COST

1. What is the estimated cost for this requirement or for each contract, if multiple awards are contemplated? What is the funding source?
2. What is the estimated cost by fiscal year?
3. Explain the basis for estimating the cost and what assumptions were made and/or data used (i.e., budgeted amount, previous contract price, current catalog or cost proposal from firms solicited, engineering or in-house estimate, etc.)
4. Explain whether the proposed Contractor or the City has a substantial dollar investment in original design, tooling or other factors which would be duplicated at City expense if another source was considered. Describe cost savings or other measurable benefits to the City which may be achieved.
5. Explain what negotiation of price has occurred or will occur. Detail why the estimated cost is deemed reasonable.

### SCHEDULE REQUIREMENTS

1. Explain how the schedule was developed and at what point the specific dates were known.
2. Is lack of drawings and/or specifications a constraining factor to competitive bidding? If so, why is the proposed Contractor the only person or firm able to perform under these circumstances? Why are the drawings and specifications lacking? What is the lead time required to get drawings and specifications suitable for competition? If lack of drawings and specifications is not a constraining factor to competitive bidding, explain why only one person or firm can meet the required schedule.
3. Outline the required schedule by delivery or completion dates and explain the reasons why the schedule is critical.
4. Describe in detail what impact delays for competitive bidding would have on City operations, programs, costs and budgeted funds.

### EXCLUSIVE OR UNIQUE CAPABILITY

1. If contemplating hiring a person or firm as a Professional Service Consultant, explain in detail what professional skills, expertise, qualifications, and/or other factors make this person or firm exclusively or uniquely qualified for the project. Attach a copy of the cost proposal, scope of services, and Temporary Consulting Services Form.
2. Does the proposed firm have personnel considered unquestionably predominant in the particular field?
3. What prior experiences of a highly specialized nature does the person or firm exclusively possess that is vital to the job, project or program?
4. What technical facilities or test equipment does the person or firm exclusively possess of a highly specialized nature which is vital to the job?
5. What other capabilities and/or capacity does the proposed firm possess which is necessary for the specific job, project or program which makes them the only source who can perform the work within the required time schedule without unreasonable costs to the City?
6. If procuring products or equipment, describe the intended use and explain any exclusive or unique capabilities, features and/or functions the items have which no other brands or models possess. Is compatibility with existing equipment critical from an operational standpoint? If so, provide detailed explanation?
7. Is competition precluded because of the existence of patent rights, copyrights, trade secrets, technical data, or other proprietary data (attach documentation verifying such)?
8. If procuring replacement parts and/or maintenance services, explain whether or not replacement parts and/or services can be obtained from any other sources? If not, is the proposed firm the only authorized or exclusive dealer/distributor and/or service center? If so, attach letter from manufacturer on company letterhead.

### MBE/WBE COMPLIANCE PLAN

All submissions must contain detailed information about how the proposed firm will comply with the requirements of the City's Minority and Women Owned Business program. All submissions must include a completed C-1 and D-1 form, which is available on the Procurement Services page on the City's intranet site. The City Department must submit a Compliance Plan, including details about direct and indirect compliance.

### OTHER

1. Explain other related considerations and attach all applicable supporting documents, i.e., an approved "ITGB Form" or "Request For Individual Hire Form".

### REVIEW AND APPROVAL

This application must be signed by both Originator of the request and signed by the Department Head. After review and final disposition from the Board, this application will be signed by the Board Chairman. After review and final disposition from the Board, this form will be presented to the Chief Procurement Officer recommending approval.

# Project Checklist

Attach required forms for each procurement type and detailed scope of services and/or specifications and forward original documents to the Chief Procurement Officer; City Hall, Room 806.

**Date:**  
2/9/15

**Department Name:**  
Innovation & Technology

**Requisition No:** 95096      **Specification No:** 61590

**PO No:** 16761      **Modification No:** 6

**Contract Liaison:**  
Judith Mims

**Telephone:**  
x2-1817

**Email:**  
Judith.Mims@cityofchicago.org

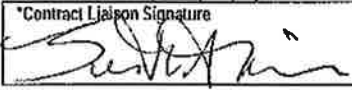
**Project / Program Manager:**  
Carmen Sandu

**Telephone:**  
x4-9408

**Email:**  
Carmen.Sandu@cityofchicago.org

For blanket agreements, original or lead department must consult with other potential departments who may want to participate on the blanket agreement. If grant funded, attach copy of the approved grant application and other terms and conditions of the funding source. Note: 1) **Funding:** Attach information if multiple funding lines; 2) **Individual Contract Services:** include approval form signed by Department Head and OBM; 3) **ITGB:** IT project valued at \$100,000.00 or more, attach approval transmittal sheet.

*\*By signing this form, I attest that all information provided is true and accurate.*

**\*Contract Liaison Signature**  


**Project Title:**  
HANSEN 8 SOFTWARE LICENSE, IMPLEMENTATION, MAINTENANCE & SUPPORT

**Project Description:**  
Time Extension and Vendor Limit Increase

**Funding:**

Corporate     Bond     Enterprise     Grant     Other:


IDOT/Transit     IDOT/Highway     FHWA     FTA     FAA

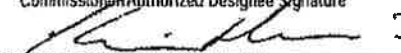
LINE	FY	FUND	DEPT	ORGN	APPR	ACTV	PROJECT	RPTG	ESTDOLLAR AMOUNT
1	014	0046	06	2005	3421	-	54021401	-	\$3,168,125
2	015	0100	06	2005	0149	-	-	-	\$698,000
3	013	0042	P06	2005	5439	-	1.54037401	-	\$525,000
4	013	0042	P06	2005	5439	-	1.5403601	-	\$1,683,400

**Check One:**

New Contract Request

*\*By signing below, I attest the estimates provided for this contract are true and accurate.*

**\*Project / Program Manager Signature**  


**\*Commissioner/Authorized Designee Signature**  
 3/20/15

**Purchase Order Type:**

Blanket/Purchase Order (DUR)

Master Consultant Agreement (Task Order)

Standard/One-Time Purchase

**Procurement Method:**

Bid     RFP     RFQ     RFI

Small Order

**Special Approvals Required:**

Emergency

Non-Competitive Review Board (NCRB)

Request for Individual Contract Services

Information Technology Governance Board (ITGB)

**Purchase Order Information:**

**Contract Term (No. of Months):** 96 months

**Extension Options (Rate of Recurrence):** 3 years

**Estimated Spend/Value:** \$35,246,568.00

**Grant Commitment / Expiration Date:**

**Pre-Bid/Submittal Conference:**  Yes     No

Mandatory     Site Visit

**Contract Type:**

Architect Engineering     Commodity     Construction     JOC     SBI

Professional Services     Revenue Generating     Vehicle & Heavy Equipment

Work Service     Joint Procurement     Reference Contract

**Modification or Amendment**

**Modification Information:**

**PO Start Date:** 01/01/2009

**PO End Date:** 01/31/2016

**Amount (Increase/Reduction):**

**Modification/Amendment Type:**

Time Extension     Scope Change/Price Increase /Additional Line Item(s)

Vendor Limit Increase     Requisition Encumbrance Adjustment

Other (specify):

**MBE/WBE/DBE Analysis: (Attach MBE/WBE/DBE Goal Setting Memo)**

Full Compliance     Contract Specific Goals

No Stated Goals     Waiver Request

**Vendor Info:**

**Name:** Infor Public Sector, Inc.

**Contact:** David Griffin

**Address:** 380 St. Peter Street; St. Paul MN 55102

**E-mail:** d.griffin@infor.com }

**Phone:** 916 436 6644

**Risk Management / EDS**

**Insurance Requirements (included)**     Yes     No

**EDS Certification of Filing (included)**     Yes     No



380 St. Peter Street  
St. Paul, MN 55102  
651-767-7000  
infor.com

March 13, 2015

Brenna Berman  
Commissioner and Chief Information Officer  
Department of Innovation and Technology  
50 W. Washington  
Chicago, IL 60602

Commissioner Berman,

As requested by Mr. Joseph Chan, please accept this letter as a request for waiver for our MBE/WBE commitment for the Annual Maintenance and License component of agreement.

- **The annual licenses are totaling \$738,000:**
- **Hansen Annual Licenses - \$698,000 and**
- **CDR Billing Licenses - \$40,000**

The challenge in providing MBE/WBE commitment for this portion is due to the fact that the scope of the maintenance and license include Infor's proprietary software, therefore Infor does not offer an opportunity for direct minority and women participation with respect to the provision of license and support.

Infor Public Sector, Inc. continues to support City of Chicago's commitment to minority and women owned businesses and have 25% MBE and 5% WBE participation for the entire services portion of the contract.

As you will see in the attached D1, we have submitted a plan to spend \$1,652,328.61 over the next year with City of Chicago certified MBE/WBE firms: Sofbang LLC (MBE), AAR & Associates (MBE), and Excelsior Consulting (WBE). At the proposed not to exceed total contract value, this will allow us to meet our goal of 25% MBE and 5% WBE participation.

Thank you for your time and consideration of this request for the waiver on the annual maintenance and licensing. We look forward to hearing your decision. In the interim, please feel free to contact me with any questions or concerns.

With Best Regards,

Patricia Elias  
Associate General Counsel  
[Patricia.elias@infor.com](mailto:Patricia.elias@infor.com)  
651-767-7000


ENC: Schedule D-1



DEPARTMENT OF INNOVATION AND TECHNOLOGY  
CITY OF CHICAGO

MEMORANDUM

**To:** Jamie Rhee  
Chief Procurement Officer  
Procurement Services

**From:** Brenna Berman   
Chief Information Officer  
Innovation and Technology

**Date:** March 20, 2015

**Re:** Partial MBE/WBE Waiver Concurrence  
Infor Public Sector  
PO 16761/ Spec. 61590  
Requisition No. 95096

I have reviewed the attached request from Infor Public Sector for a partial waiver to the Annual Maintenance and License component of the amendment to PO 16761 and concur with their justification to apply the full compliance goals of 25%MBE and 5% WBE to the entire services portion of the requisitioned amendment.

The assistance and direction provided by your staff is greatly appreciated. I thank you for your consideration in your review of this request.

attachment

cc: NCRB  
J. Himenez/DPS  
C. Sandu/DoIT  
S. Thomas/DoIT  
J. Mims/DoIT



CERTIFICATE OF FILING FOR  
CITY OF CHICAGO ECONOMIC DISCLOSURE STATEMENT

EDS Number: 49739

Certificate Printed on: 08/25/2014

Date of This Filing:05/16/2014 10:42 AM

Original Filing Date:11/20/2013 02:28 PM

Disclosing Party: Infor Public Sector, Inc.

Filed by: Mr. Bradford Steiner

Title:VP and Deputy General Counsel

Matter: HANSEN 8 SOFTWARE LICENSE,  
IMPLEMENTATION, MAINTENANCE &  
SUPPORT

Applicant: Infor Public Sector, Inc.

Specification #: 61590

Contract #: 16761

The Economic Disclosure Statement referenced above has been electronically filed with the City. Please provide a copy of this Certificate of Filing to your city contact with other required documents pertaining to the Matter. For additional guidance as to when to provide this Certificate and other required documents, please follow instructions provided to you about the Matter or consult with your City contact.

A copy of the EDS may be viewed and printed by visiting <https://webapps1.cityofchicago.org/EDSWeb> and entering the EDS number into the EDS Search. Prior to contract award, the filing is accessible online only to the disclosing party and the City, but is still subject to the Illinois Freedom of Information Act. The filing is visible online to the public after contract award.



CERTIFICATE OF FILING FOR  
CITY OF CHICAGO ECONOMIC DISCLOSURE STATEMENT

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Date of This Filing:11/20/2013 02:28 PM

Certificate Printed on: 11/22/2013

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Filed by: Mr. Bradford Steiner

Matter: Hansen 8 Software Implementation,

Maintenance and Support

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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
2/10/2015

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> Commercial Lines - (404) 923-3700 Wells Fargo Insurance Services USA, Inc. 3475 Piedmont Road NE, Suite 800 Atlanta, GA 30305-2886	<b>CONTACT NAME:</b> Atlanta Certificate Requests <b>PHONE (A/C, No, Ext):</b> 404-923-3700 <b>FAX (A/C, No):</b> 877-362-9069 <b>E-MAIL ADDRESS:</b> atlcertrequest@wellsfargo.com														
<b>INSURED</b> Infor Enterprise Applications LP and its Subsidiaries 13560 Morris Road Suite 4100 Alpharetta GA 30004	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">INSURER(S) AFFORDING COVERAGE</th> <th style="width: 20%;">NAIC #</th> </tr> </thead> <tbody> <tr> <td><b>INSURER A :</b> Federal Insurance Company</td> <td>20281</td> </tr> <tr> <td><b>INSURER B :</b> Chubb Indemnity Insurance Co.</td> <td>12777</td> </tr> <tr> <td><b>INSURER C :</b> Beazley Insurance Company</td> <td>37540</td> </tr> <tr> <td><b>INSURER D :</b></td> <td></td> </tr> <tr> <td><b>INSURER E :</b></td> <td></td> </tr> <tr> <td><b>INSURER F :</b></td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	<b>INSURER A :</b> Federal Insurance Company	20281	<b>INSURER B :</b> Chubb Indemnity Insurance Co.	12777	<b>INSURER C :</b> Beazley Insurance Company	37540	<b>INSURER D :</b>		<b>INSURER E :</b>		<b>INSURER F :</b>	
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<b>INSURER E :</b>															
<b>INSURER F :</b>															

**COVERAGES**
**CERTIFICATE NUMBER: 8715876**
**REVISION NUMBER: See below**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Broad Form Property Damage <input checked="" type="checkbox"/> Blanket Contractual GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			35851844	11/30/2014	11/30/2015	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 25,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			73543744  Hired Car Physical Damage-ACV	11/30/2014	11/30/2015	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0			79839130	11/30/2014	11/30/2015	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			71718041 (All States) 71725758 (Hawaii & Idaho)	11/30/2014 11/30/2014	11/30/2015 11/30/2015	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	<input checked="" type="checkbox"/> <b>Blnk Bldg/BPP ALL RISK/R/C Business Theft</b>			35851844	11/30/2014	11/30/2015	\$22,907,147/ \$5,000 Deductible Business Interruption-12 Months Property/Installation

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

RE: Amendment Three for Hansen 8 Software Implementation and Hansen Maintenance and Support Specification No 61590 Contract No 16761  
 The City of Chicago is named as Additional Insured on Primary and Non-Contributory basis for General Liability, Automobile Liability, Valuable Papers and Umbrella Liability coverage, but only as required by written contract with the Named Insured, per the terms and conditions of the policies. Waiver of Subrogation applies to General Liability and Automobile Liability, per the terms and conditions of the policies. All Risk Property/Installation Insurance must be maintained by the Consultant at replacement cost. Insuring loss or damage to City property including Department of Business Information Services equipment/system, computer software, materials, parts and supplies that are part of the project during the course of design, development, Implementation, installation, testing(until City acceptance), and during maintenance, support, training of the Hansen 8 Software. Coverage must include worksite, in transit,

**CERTIFICATE HOLDER**
**CANCELLATION**

City of Chicago Department of Procurement Services 121 North Lasalle Street City Hall, Room 806 Chicago, IL 60602	<p><b>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</b></p> <p><b>AUTHORIZED REPRESENTATIVE</b></p> <p style="text-align: right;"><i>Jean Brubaker</i></p>
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**ACORD 25 (2014/01)**

## Certificate of Insurance (Con't)

### OTHER Coverage

INSR LTR	TYPE OF INSURANCE	ADDL INSR	WVD SUBR	POLICY NUMBER	EFFECTIVE DATE (MM/DD/YY)	EXPIRATION DATE (MM/DD/YY)	LIMIT
C	E&O/Prof Liab			V146EA140201	11/30/2014	11/30/2015	\$3,000,000 USD per claim limit liability
	Retro Date:02/01/04						\$3,000,000 USD annual aggregate limit of liability
	Technology E&O						\$1,000,000 USD Deductible per claim

## Additional Remarks Schedule (Continued from Page 1)

offsite, faulty workmanship or materials, testing and mechanical-electrical breakdown. City of Chicago is included as Additional Insured and loss payee as their interest may appear, per the terms and conditions of the policies.



DEPARTMENT OF INNOVATION AND TECHNOLOGY  
CITY OF CHICAGO

**Scope of Work**  
**Specification Number 61590**

The City of Chicago desires to execute a Statement of Work with Infor Public Sector Inc., to provide post implementation support for Hansen system as well as professional services for additional implementation requirements. These services include:

- Hansen 7 System support includes:
  - Provide existing application support for Hansen 7 back office permitting system for department of Buildings and Annual inspections for Fire Prevention Bureau
  - Technical support for Web portal application for online buildings permits, Annual elevator inspections, Trade license renewal and Vacant Building Registrations
  - Support interface's with City's GIS system, Collection systems (ARMS) and 311/CSR systems
  - Maintain and upgrade mobile inspections software used by buildings inspectors
  
- Hansen 8 System support includes:
  - Provide existing application support for Hansen87 back office permitting system for department of Planning, Annual inspections for Fire Prevention Bureau and environmental permits for Department of Public Health.
  - Technical support for permit web portal for online environmental permits for Department of Public Health.
  - Support interfaces with City's GIS system and Data Portal website.
  - Maintain and upgrade mobile inspections software used by Fire Prevention and Department of Planning inspector

○ Services to complete Mayor's Paperless Initiative

- Department of Buildings Upgrade from Hansen 7 to Hansen 8 which includes:
  - Migration of existing system configuration from Hansen 7 to Hansen 8
  - Migration of historical permit and inspections data from Hansen 7 to Hansen 8
  - Developing reporting using Business Objects and Crystal reports to support business needs
  - Configuring Hansen 8 system to support issuance of all building permits
  - Developing real-time interface to Electronic Plan Review system (E-plan), City GIS system, Business Licensing system (IRIS) and Data Portal
  
- Department of Transportation migration from legacy system to Hansen 8 which includes:
  - Migration of existing system configuration to replace Motorola's NSR system with Hansen 8 for issuance of Public way use permits
  - Migration of historical permit and inspections data from NSR system to Hansen 8
  - Developing reporting using Business Objects and Crystal reports to support business needs
  - Configuring Hansen 8 system to support issuance of all CDOT public way permits
  - Developing real-time interface to Electronic Plan Review system (E-plan), City GIS system, Business Licensing system (IRIS) and Data Portal
  - Replace existing Digger/CUAN system with Hansen 8
  - Developing website to allow customers to request Public way use permit and Dig notices online
  
- Development of Chicago Business Portal / One-Stop Shop Wizard includes:

- Development of a single web portal to consolidate permits from Hansen 8 system and Business Licenses from IRIS system
- Development web capability for customers to register and manage a task list of activities required for getting new Business License or Permit(s) from City.
- Develop ability to provide status update on applications submitted to City for reviews

The scope of services provides for one year renewal of software support and maintenance of the following systems:

- Hansen 7 & 8 application software at an annual cost of \$ 698,000.00
- Infor CDR Billing at an annual cost of \$ 40,000.00

These fees cover application upgrades and 24/7 technical support of product.

Sincerely



Sunil Thomas, IT Director

Department of Innovation and Technology



DEPARTMENT OF INNOVATION AND TECHNOLOGY  
CITY OF CHICAGO

MEMORANDUM

**TO:** Jamie L. Rhee  
Chief Procurement Officer  
Procurement Services

**FROM:** Brenna Berman  
Chief Information Officer  
Innovation and Technology 

**DATE:** Feb 5, 2015

**RE:** NCRB Extension and Vendor Limit Increase Request  
PO 16761 / Infor Public Sector Inc.  
Specification No. 61590  
RX 95096/Request for 1 year extension

The Department of Innovation and Technology (DoIT) is requesting a one year extension to the Consulting Agreement between Infor Public Sector Inc., and the City of Chicago (PO 16761), for the provision of acquiring professional services for Hansen 8 software implementation and support for the permitting, inspection services, fee payments, online web portals and mobile solutions. DoIT, working closely with the vendor team, is in the process of migrating permitting and inspection functions for the Department of Transportation and Buildings to Hansen 8. This is a critical component of the Mayor's Paperless Permitting Initiative.

Accordingly, we are requesting that the expiration date for PO 16761 extended one year to January 2016 and the contract limit extended to \$35,246,568.00. The current contract limit is set at \$29,166,343.04. A breakdown of the \$6,080,225 increase is shown as follows:

- Hansen annual onsite support \$ 3,168,425
- Hansen 7 & 8 annual maintenance \$ 698,000
- CDR Billing (Services and Maintenance) \$ 525,000
- One-stop shop / wizard implementation \$ 1,688,800

This extension would enable DoIT to complete the Hansen 8 implementation for CDOT and maintain critical level of support for permitting and inspections functions across multiple departments. Infor is the Copyright owner of Hansen 7 & 8 products and is the only vendor who can provide patches and upgrades to this product under maintenance and support.





380 St. Peter Street  
St. Paul, MN 55102  
651-767-7000  
[www.infor.com](http://www.infor.com)

August 19, 2014

City of Chicago  
Attn: Ms. Brenna Berman  
Department of Innovation and Technology  
50 West Washington  
Chicago, IL 60602

Dear Ms. Berman:

Infor has received your request for a sole source justification for support and maintenance of the Infor-owned software products that you have licensed from Infor.

Infor is the copyright owner for the vast majority of these software products, and as such, Infor is the only vendor that has the unrestricted ability to access and modify such Infor-owned software products in order to provide bug fixes, updates and upgrades to you as part of support and maintenance.

Please don't hesitate to contact David Griffin, the Director, ICS Consulting Practice for your account, at 916-436-6644 or [David.Griffin@infor.com](mailto:David.Griffin@infor.com) if you have additional questions on this matter.

Sincerely,

A handwritten signature in cursive script that reads "Patricia Elias".

Patricia Elias  
Associate General Counsel



**SERVICES WORK ORDER**

This Services Work Order ("Work Order") is subject to all terms and conditions of the Contract (PO) Number 167610 between Hansen Information Technologies (now Infor Public Sector Inc.), an Infor company ("Consultant") and City of Chicago ("City") with an Effective Date of January 1, 2014 (the "Agreement"). All terms of the Agreement are incorporated herein by this reference. Capitalized terms not defined in this Work Order are defined in the Agreement. In the event of a conflict, the terms of this Work Order control over the terms of the Agreement.

Effective date of this Work Order: February 1, 2015

Task Order Number: 127 – Hansen Support and Project Staffing

Prepared By: David Griffin

Approved By: Kevin Flynn

<b>Project Name:</b>	<b>Chicago - Hansen Support and Project Staffing</b>
<b>Project ID:</b>	
<b>Objective:</b>	<p>This Work Order addresses Hansen Support , Chicago Department of Buildings staffing, One stop shop and paperless initiatives as approved by the City.</p> <p>This Work Order is for the calendar year of 2014 starting February 1, 2015 and ending January 31, 2016 for an estimated \$5,341,942.28.</p> <p>This service and support proposal is in response to the Department of Innovation and Technology (DoIT) request for Hansen to provide recommendations to meet the City's service and support requirements as listed below.</p>

**Project Scope**

1. The City is seeking assistance from Consultant in providing post implementation support for their deployed Hansen system as well as services for additional implementation requirements.
2. The City is requesting support for the following services in addition to standard Hansen SMA support:

Project Task	Hours Allocated
Project Manager	1400
Data Standardization	300
Training	20
Instance and systems support	780
GIS	250
8.3 Upgrade	610
Mobile Development	620
PCR's - Hansen 7	850
PCR's - Hansen 8	3270
PCR's - Data request or FOIA	450
PCR's - AIC	340
PCR's - VBR	150
PCR's - Dynamic Portal	440
CDR Billing - H8 Configuration	1720
CDR Billing - Interfaces	470
DoB - H8 Configuration	3880
DoB - Web & Mobile development	2020
DoB - Interfaces	1000
DoB - Reports	700

DoB - Project level work (incl. QA & QC)	750
Wizard - H8 Configuration	3420
Wizard - Web & Mobile development	6843
Wizard - Data	1922
Wizard - Project level work (incl. QA & QC)	380
<b>Total</b>	<b>32585</b>

### Project Deliverables

1. The current software applications to be supported by the Onsite Hansen project team include:
  - Hansen CDR – Building Permits
  - Hansen CDR – Use permits
  - Hansen CDR – Planning
  - Hansen CDR – Projects
  - Hansen CDR – Code Enforcement / Case Management
  - Hansen Customer Services / Complaint Management
  - Hansen – Buildings/Equipment
  - Hansen – Dynamic Portal for Permits
  - Hansen Mobile Solutions
  
2. The project team will focus their attention on approved DoIT work projects in support of the Hansen application, as agreed upon by City and Consultant project management, including, but not limited to the following projects:
  - Hansen 7 Support
  - Hansen 8 Support
  - Department of Transportation migration from legacy system
  - City paperless initiatives for permits and licenses including one-stop shop.

### Project Assumptions



**Assumptions for Level of Effort**

These assumptions represent operation guidelines intended to protect the interests of both the City and Consultant and to minimize costs. If these assumptions are not met it could increase the cost of this project.

1. The complexity of the process was not miscommunicated and understated in the discussions that led to the creation of this Work Order.
2. Appropriate 'process experts' will be available for interview with reasonable notice and will have adequate knowledge of the process to provide answers regarding the process and associated business rules.
3. Process owners (department heads, managers, supervisors) will be available with reasonable notice to confirm and validate the results of the process interviews.
4. In the event questions arise regarding the correct policy or process, the question will be resolved within 24 hours with a definitive answer from an appropriate 'authority' within the City organization.
5. City personnel will attend and be on time for all scheduled process interviews, technical 'side bars', question resolution sessions and 'sign-off' meetings. City personnel will remain available throughout the scheduled time period.
6. The City will provide qualified personnel for testing process setups within Hansen when requested. Issues or problems that are identified during testing will be documented in an approved format.
7. The City will complete testing in a reasonable amount of time (as per the estimated effort) and correctly identify and document all problems present during that 'round' of testing.
8. Following revisions to the setup by Infor, the City will promptly retest and provide written verification either that the requested change has been completed and accepted or that the change is in error and provide clarification regarding the proper correction.
9. No changes are needed to the process after final approval.

Any software change request will be evaluated on any individual basis and are not a part of any cost estimate in this task order. The City will assign a Project Manager, counterpart to the Consultant Project Manager, who will be responsible for the timely management and follow-up of tasks assigned to City personnel.

**Project Exclusions**

None



## Consultant Responsibilities

### Description of Work

#### Project Manager

- Single point of contact for all project related issues – technical, financial, organizational, Management
- Develops and manages the Project Plan milestones
- Day-to-day management of project deliverables and communication including allocation of resources, guidance and support for project staff, resolution of project scheduling and delays
- Completes and delivers the Executive Monthly Status Report and Weekly Status Report
- Assists team members as needed with assigned tasks

#### PM Lead

- Provide Hansen production support to address documented defects and provide enhancements as directed by City Steering Committee in conjunction with the City's IT Director and Consultant Project Manager.
- Assists team members and Project Manager as needed with assigned tasks
- Key point of contact when Project Manager is not on site

#### Application Consultant(s) (Business Analyst/Configurator)

- Provide Hansen production support to address documented defects and provide enhancements as directed by City Steering Committee in conjunction with the City's IT Director and Consultant Project Manager.
- Review and analyze the "as-is" business process to formulate the "to-be" process
- The "to-be" process will be documented in the SDD that consists of Visio's, Tabular Data and Word Document
- Work in partnership with DoIT and DOB to identify business process improvement opportunities
- Collaborate with Consultant team members, DoIT and DOB to help ensure all system design requirements adequately reflect the defined business processes and fully support all components of the functional business requirements
- Configure Hansen 8 Workflows
- Develop Test Scripts and support Testing

#### Technical Consultant – Conversions

- Provide Hansen production support to address documented defects and provide enhancements as directed by City Steering Committee in conjunction with the City's IT Director and Consultant Project Manager.
- Evaluate databases and metadata files submitted for Hansen 8 Conversion
- Provide recommendations on conversion approach

#### Technical Consultant – Interfaces

- Provide Hansen production support to address documented defects and provide enhancements as directed by City Steering Committee in conjunction with the City's IT Director and Consultant Project Manager.
- Evaluate sample data and external systems
- Provide recommendations on interface approach

#### Application Consultant – Crystal Reports

- Provide Hansen production support to address documented defects and provide enhancements as directed by City Steering Committee in conjunction with the City's IT Director and Consultant Project Manager.
- Evaluate reports
- Provide recommendations on the implementation of the reports.

#### Application Consultant – Dynamic Portal

- Provide Hansen production support to address documented defects and provide enhancements as directed by City Steering Committee in conjunction with the City's IT Director and Consultant Project Manager.
- Discuss and analyze business process and recommend an implementation strategy

## Licensee Responsibilities



Licensee shall have the following responsibilities under this Work Order:

- Licensee will provide a Project Manager
- Licensee will provide designated internal resources as required to complete project activities
- Licensee will maintain the project plan for all requested consulting services
- Licensee will provide the proper infrastructure for the execution of outlined project



Services Fee Estimates			
Role	Estimated Hours	Rate	Estimated Fee
ICS Consultant, Sr.	1720	\$ 164.80	\$ 283,456.00
ICS Project Manager, Assoc.	1720	\$ 164.80	\$ 283,456.00
ICS Consultant	1600	\$ 164.80	\$ 263,680.00
ICS Consultant	1720	\$ 164.80	\$ 283,456.00
ICS Project Manager	1720	\$ 175.10	\$ 301,172.00
ICS Consultant	1720	\$ 164.16	\$ 282,355.20
ICS Consultant	1400	\$ 164.16	\$ 229,824.00
ICS Consultant	1200	\$ 164.80	\$ 197,760.00
ICS Consultant	1720	\$ 164.16	\$ 282,355.20
ICS Consultant, Assoc.	20	\$ 134.72	\$ 2,694.40
ICS Consultant	1720	\$ 164.16	\$ 282,355.20
ICS Project Director	1400	\$ 173.81	\$ 243,334.00
ICS Consultant, Assoc.	1720	\$ 135.19	\$ 232,526.80
ICS Project Manager, Assoc.	1710	\$ 164.80	\$ 281,808.00
ICS Consultant	1710	\$ 164.80	\$ 281,808.00
ICS Consultant	1710	\$ 164.16	\$ 280,713.60
ICS Consultant	1710	\$ 164.16	\$ 280,713.60
ICS Consultant	1710	\$ 164.16	\$ 280,713.60
ICS Consultant	1713	\$ 165.16	\$ 282,919.08
ICS Consultant	1222	\$ 164.80	\$ 201,385.60
ICS Consultant, Principal	1720	\$ 164.80	\$ 283,456.00
<b>Total</b>	<b>32585</b>		<b>\$ 5,341,942.28</b>

Estimated time, fees and costs listed in this Work Order represent an estimate only. Actual project time, fees and costs may vary from the estimates provided. Where a substantial variation from this Work Order is foreseen, both parties must agree in writing to the additional work and amend this Work Order accordingly. All services are provided on a time and materials basis and are billed monthly. Travel and living expenses are included in the estimated fees stated herein. Overtime rates of 150% of the quoted rate apply for after hours and weekend work. "After hours work" is defined as services performed between 8:00 p.m. and 6:00 a.m. "Weekend work" is defined as services performed between 8:00 p.m. Friday and 6:00 a.m. Monday. Holiday rates of 200% of the quoted rate apply for all holiday work.

**LOCATIONS:** Services may be provided at the facilities of Consultant or its Subcontractors, or at the City sites listed below. A minimum of ½ day (4 hours) will be charged for all work at City's facilities. Remote services provided via phone, facsimile or remote access to City's site will be charged at the standard hourly rate.

**PAYMENT:** Consultant will invoice City for all services and applicable charges on a monthly basis, as Consultant renders the services or the City incurs the charges, as applicable. Services fees related to training are payable in advance, and the City will be invoiced by Consultant for such training upon receipt of this Work Order. City will pay each Consultant invoice within sixty (60) days of the date of invoice.

THE PARTIES have executed this Work Order through the signatures of their respective authorized representatives.

**HANSEN INFORMATION TECHNOLOGIES**  
 Signature: \_\_\_\_\_

**City of Chicago**  
 Signature: \_\_\_\_\_



**Printed Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Signature Date:** \_\_\_\_\_

**Printed Name:** Sunil Thomas

**Title:** IT Director

**Address:** 50 W Washington St.

**Address:** Chicago, IL 60602

**Signature Date:** \_\_\_\_\_





**City Contact Information:**

Contact Person: Sunil Thomas

**Contact Person Address:**

Department of Innovation & Technology, City of Chicago  
Daley Center, Room 2700  
50 W. Washington St., Chicago, IL 60602

Contact Person Phone Number: 312-744-3960

Contact Person Fax Number: 312-744-9004

Contact Person Email: [sunil.thomas@cityofchicago.org](mailto:sunil.thomas@cityofchicago.org)

**Site Addresses:**

121 North Racine, Chicago \_\_\_\_\_

30 N. LaSalle Street, Chicago, IL \_\_\_\_\_

121 N.LaSalle Street, Chicago, IL \_\_\_\_\_

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SERVICES ENGAGEMENT SET UP – INTERNAL USE ONLY	
<b>Engagement Manager:</b>	
<b>Time Approver:</b>	<b>Alternate Approver:</b>
<b>Item Class:</b>	<b>Product:</b>

Tw 22/march/2011



FOR  
NON-CONSTRUCTION  
PROJECTS ONLY

**SCHEDULE C-1**  
**MBE/WBE Letter of Intent to Perform as a**  
**Subcontractor, Supplier, or Consultant**

Project Name: Hansen 8 Software Implementation, Maintena Specification No.: 61590

From: Excelsior Consulting Services, Inc.  
(Name of MBE/WBE Firm)

To: Infor Public Sector, Inc and the City of Chicago.  
(Name of Prime Contractor)

The MBE or WBE status of the undersigned is confirmed by the attached City of Chicago Certification Letter. 100% MBE or WBE participation is credited for the use of a MBE or WBE "manufacturer." 60% participation is credited for the use of a MBE or WBE "regular dealer."

The undersigned is prepared to perform the following services in connection with the above named project/contract. If more space is required to fully describe the MBE or WBE proposed scope of work and/or payment schedule, including a description of the commercially useful function being performed. Attach additional sheets as necessary:

Project Support Services for deployment and technical support

The above described performance is offered for the following price and described terms of payment:

\$288,000- For the duration of the of the contract with the City of Chicago as per the contract agreement and payment by city prior to Subcontractor payments

**SUB-SUBCONTRACTING LEVELS**

A zero (0) must be shown in each blank if the MBE or WBE will not be subcontracting any of the work listed or attached to this schedule.

0 % of the dollar value of the MBE or WBE subcontract that will be subcontracted to non MBE/WBE contractors.

0 % of the dollar value of the MBE or WBE subcontract that will be subcontracted to MBE or WBE contractors.

**NOTICE: If any of the MBE or WBE scope of work will be subcontracted, list the name of the vendor and attach a brief explanation, description and pay item number of the work that will be subcontracted. MBE/WBE credit will not be given for work subcontracted to Non-MBE/WBE contractors, except for as allowed in the Special Conditions Regarding Minority Business Enterprise Commitment and Women Business Enterprise Commitment.**

The undersigned will enter into a formal written agreement for the above work with you as a Prime Contractor, conditioned upon your execution of a contract with the City of Chicago, within three (3) business days of your receipt of a signed contract from the City of Chicago.

**NOTICE: THIS SCHEDULE AND ATTACHMENTS REQUIRE ORIGINAL SIGNATURES.**

K. S. Sudha 07/18/14  
(Signature of President/Owner/CEO or Authorized Agent of MBE/WBE) (Date)

SUDHASHREE KOTTA, PRESIDENT  
(Name/Title-Please Print)

Sudha@excelsiorconsulting.net (973)-447-2575  
(Email & Phone Number)



FOR  
NON-CONSTRUCTION  
PROJECTS ONLY

**SCHEDULE C-1**  
MBE/WBE Letter of Intent to Perform as a  
Subcontractor, Supplier, or Consultant

Project Name: Hansen 8 Software Implementation, Maintena Specification No.: 61590

From: Sofbang LLC  
(Name of MBE/WBE Firm)

To: Infor Public Sector, Inc and the City of Chicago.  
(Name of Prime Contractor)

The MBE or WBE status of the undersigned is confirmed by the attached City of Chicago Certification Letter. 100% MBE or WBE participation is credited for the use of a MBE or WBE "manufacturer." 60% participation is credited for the use of a MBE or WBE "regular dealer."

The undersigned is prepared to perform the following services in connection with the above named project/contract. If more space is required to fully describe the MBE or WBE proposed scope of work and/or payment schedule, including a description of the commercially useful function being performed. Attach additional sheets as necessary:

Project Support Services for deployment and technical support

The above described performance is offered for the following price and described terms of payment:  
\$316,842.50 - For the duration of the of the contract with the City of Chicago as per the contract agreement and  
payment by city prior to Subcontractor payments

**SUB-SUBCONTRACTING LEVELS**

A zero (0) must be shown in each blank if the MBE or WBE will not be subcontracting any of the work listed or attached to this schedule.

\_\_\_\_\_ % of the dollar value of the MBE or WBE subcontract that will be subcontracted to non MBE/WBE contractors.  
\_\_\_\_\_ % of the dollar value of the MBE or WBE subcontract that will be subcontracted to MBE or WBE contractors.

**NOTICE: If any of the MBE or WBE scope of work will be subcontracted, list the name of the vendor and attach a brief explanation, description and pay item number of the work that will be subcontracted. MBE/WBE credit will not be given for work subcontracted to Non-MBE/WBE contractors, except for as allowed in the Special Conditions Regarding Minority Business Enterprise Commitment and Women Business Enterprise Commitment.**

The undersigned will enter into a formal written agreement for the above work with you as a Prime Contractor, conditioned upon your execution of a contract with the City of Chicago, within three (3) business days of your receipt of a signed contract from the City of Chicago.

**NOTICE: THIS SCHEDULE AND ATTACHMENTS REQUIRE ORIGINAL SIGNATURES.**

[Signature] 6/23/2014  
(Signature of President/Owner/CEO or Authorized Agent of MBE/WBE) (Date)  
PRINCIPAL / GENERAL MANAGER  
(Name/Title-Please Print)  
AL.POMERANTZ@ SOFBANG.COM 312-279-0430 x2001  
(Email & Phone Number)



**SCHEDULE C-1**  
MBE/WBE Letter of Intent to Perform as a  
Subcontractor, Supplier, or Consultant

**FOR  
NON-CONSTRUCTION  
PROJECTS ONLY**

Project Name: Hansen 8 Software Implementation, Maintena Specification No.: 61590

From: A. Alva Rosales and Associates  
(Name of MBE/WBE Firm)

To: Infor Public Sector, Inc and the City of Chicago.  
(Name of Prime Contractor)

The MBE or WBE status of the undersigned is confirmed by the attached City of Chicago Certification Letter. 100% MBE or WBE participation is credited for the use of a MBE or WBE "manufacturer." 60% participation is credited for the use of a MBE or WBE "regular dealer."

The undersigned is prepared to perform the following services in connection with the above named project/contract. If more space is required to fully describe the MBE or WBE proposed scope of work and/or payment schedule, including a description of the commercially useful function being performed. Attach additional sheets as necessary:

~~Project Support Services for deployment and technical support~~

The above described performance is offered for the following price and described terms of payment:

~~\$1,068,389.00 - For the duration of the of the contract with the City of Chicago as per the contract agreement and payment by city prior to Subcontractor payments~~

**SUB-SUBCONTRACTING LEVELS**

A zero (0) must be shown in each blank if the MBE or WBE will not be subcontracting any of the work listed or attached to this schedule.

0 % of the dollar value of the MBE or WBE subcontract that will be subcontracted to non MBE/WBE contractors.

0 % of the dollar value of the MBE or WBE subcontract that will be subcontracted to MBE or WBE contractors.

**NOTICE: If any of the MBE or WBE scope of work will be subcontracted, list the name of the vendor and attach a brief explanation, description and pay item number of the work that will be subcontracted. MBE/WBE credit will not be given for work subcontracted to Non-MBE/WBE contractors, except for as allowed in the Special Conditions Regarding Minority Business Enterprise Commitment and Women Business Enterprise Commitment.**

The undersigned will enter into a formal written agreement for the above work with you as a Prime Contractor, conditioned upon your execution of a contract with the City of Chicago, within three (3) business days of your receipt of a signed contract from the City of Chicago.

**NOTICE: THIS SCHEDULE AND ATTACHMENTS REQUIRE ORIGINAL SIGNATURES.**

July 9, 2014  
(Signature of President/Owner/CEO or Authorized Agent of MBE/WBE) (Date)  
Arabel Alva Rosales / President and CEO  
(Name/Title-Please Print)  
Arabel@AlvaRosales.com (773)  
(E-mail & Phone Number)



**SCHEDULE D-1**  
Compliance Plan Regarding MBEMBE Utilization  
Affidavit of Prime Contractor

FOR  
NON-CONSTRUCTION  
PROJECTS ONLY

MUST BE SUBMITTED WITH THE BID. FAILURE TO SUBMIT THE SCHEDULE D WILL CAUSE THE BID TO BE REJECTED. DUPLICATE AS NEEDED.

Project Name: Hansen 8 Software Implementation, Maintenance and Support

Specification No.: 61590

In connection with the above captioned contract, I HEREBY DECLARE AND AFFIRM that I am a duly authorized representative of Infor Public Sector, Inc.

(Name of Prime Consultant/Contractor)

and that I have personally reviewed the material and facts set forth herein describing our proposed plan to achieve the MBEMBE goals of this contract.

All MBEMBE firms included in this plan have been certified as such by the City of Chicago (Letters of Certification Attached).

I. Prime Consultant/Contractor:

NOTE: The bidder/proposer shall, in determining the manner of MBEMBE participation, first consider involvement with MBEMBE firms as joint venture partners, subcontractors, and suppliers of goods and services directly related to the performance of this contract.

A. If bidder/proposer is a certified MBE or WBE firm, attach copy of the City of Chicago Letter of Certification. (Certification of the bidder/proposer as a MBE satisfies the MBE goal only. Certification of the bidder/proposer as a WBE satisfies the WBE goal only.)

B. If bidder/proposer is a joint venture and one or more joint venture partners are certified MBEs or WBEs, attach copies of Letters of Certification and a copy of Joint Venture Agreement clearly describing the role of the MBEMBE firm(s) and its ownership interest in the joint venture.

C. MBEMBE Subcontractors/Suppliers/Consultants:

1. Name of MBEMBE: A. Alva Rosales and Associates

Address: 431 W Pershing Rd, Second Floor, Chicago, IL 60609

Contact Person: Maria Flores

Phone Number: 773-733-7140

Dollar Amount Participation: \$ 1,068,389.00

Percent Amount Participation % 20%

Schedule C-1 Attached? YES  NO

See Next Page

2. Name of MBEMBE: Sofbang LLC

Address: 145 Tower Drive #1, Burr Ridge, IL 60527

Contact Person: Genevieve Claveau

Phone Number: 630.789.3659

Dollar Amount Participation: \$316,842.50

Schedule D-1: Prime Contractor Affidavit-MBE/WBE

Percent Amount Participation % 6%

Schedule C-1 Attached? YES  NO\*

3. Name of MBE/WBE: Excelsior Consulting Services, Inc.

Address: 1020, Ashford Lane Westmont, IL 60559-2657

Contact Person: Sudhir Kota

Phone Number: 973-447-2575

Dollar Amount Participation; \$ \$268,000

Percent Amount Participation % 5%

Schedule C-1 Attached? YES  NO\*

4. Name of MBE/WBE: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Dollar Amount Participation; \$ \_\_\_\_\_

Percent Amount Participation % \_\_\_\_\_

Schedule C-1 Attached? YES  NO\*

5. Attach Additional Sheets as Needed

**\*All Schedule C-1s and Letters of Certification not submitted with bid/proposal must be submitted so as to assure receipt by the Contract Administrator within three (3) business days after bid opening (or proposal due date.)**

**II. Indirect Participation of MBE/WBE Firms**

NOTE: This section need not be completed if the MBE/WBE goals have been met through the direct participation outlined in Section I. If the MBE/WBE goals have not been met through direct participation, Contractor will be expected to demonstrate that the proposed MBE/WBE direct participation represents the maximum achievable under the circumstances. Only after such a demonstration will indirect participation be considered.

MBE/WBE Subcontractors/Suppliers/Consultants proposed to perform work or supply goods or services where such performance does not directly relate to the performance of this contract:

1. Name of MBE/WBE: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Dollar Amount Participation; \$ \_\_\_\_\_

Schedule D-1: Prime Contractor Affidavit-MBE/WBE

Percent Amount Participation % \_\_\_\_\_  
Schedule C-1 Attached? YES  NO\*

2. Name of MBE/WBE: \_\_\_\_\_

Address: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Dollar Amount Participation: \$ \_\_\_\_\_  
Percent Amount Participation % \_\_\_\_\_  
Schedule C-1 Attached? YES  NO\*

3. Name of MBE/WBE: \_\_\_\_\_


Address: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Dollar Amount Participation: \$ \_\_\_\_\_  
Percent Amount Participation % \_\_\_\_\_  
Schedule C-1 Attached? YES  NO\*

4. Name of MBE/WBE: \_\_\_\_\_

Address: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Dollar Amount Participation: \$ \_\_\_\_\_  
Percent Amount Participation % \_\_\_\_\_  
Schedule C-1 Attached? YES  NO\*

5. Attach Additional Sheets as Needed

\*All Schedule C-1s and Letters of Certification not submitted within three (3) business days after bid opening (or proposal due date.)  
assure receipt by the Contract Administrator within three (3) business days after bid opening (or proposal due

 \*See Below

Schedule D-1: Prime Contractor Affidavit-MBE/WBE

III. Summary of MBE/WBE Proposal

A. MBE Proposal (Direct & Indirect)

1. MBE Direct Participation

MBE Firm Name	Dollar Amount Participation (\$)	Percent Amount Participation (%)
AAR and Associates	\$ 1,068,389.00	20%
Sofbang LLC	\$316,842.50	6%
<b>Total Direct MBE Participation</b>	<b>\$1,385,231.50</b>	<b>26%</b>

2. MBE Indirect Participation

MBE Firm Name	Dollar Amount Participation (\$)	Percent Amount Participation (%)
<b>Total Indirect MBE Participation</b>		

B. WBE Proposal (Direct & Indirect)

1. WBE Direct Participation

WBE Firm Name	Dollar Amount Participation (\$)	Percent Amount Participation (%)
Excelsior Consulting Services, Inc.	\$268,000	5%
<b>Total Direct WBE Participation</b>	<b>\$268,000</b>	<b>5%</b>

2. WBE Indirect Participation

WBE Firm Name	Dollar Amount Participation (\$)	Percent Amount Participation (%)
<b>Total Indirect WBE Participation</b>		



Schedule D-1: Prime Contractor Affidavit-MBE/WBE Compliance Plan

The Prime Contractor designates the following person as its MBE/WBE Liaison Officer:

(Name- Please Print or Type)

(Phone)

I DO SOLEMNLY DECLARE AND AFFIRM UNDER PENALTIES OF PERJURY THAT THE CONTENTS OF THE FOREGOING DOCUMENT ARE TRUE AND CORRECT, THAT NO MATERIAL FACTS HAVE BEEN OMITTED, AND THAT I AM AUTHORIZED ON BEHALF OF THE PRIME CONTRACTOR TO MAKE THIS AFFIDAVIT.

Infor Public Sector, Inc.

(Name of Prime Contractor -- Print or Type)

State of: Minnesota

Patricia Elias  
(Signature)

County of: Ramsey

Patricia Elias  
Associate General Counsel

(Name/Title of Affiant -- Print or Type)

(Date)

8/21/2014

On this 21<sup>st</sup> day of August, 2014, the above signed officer Patricia Elias  
(Name of Affiant)

personally appeared and, known by me to be the person described in the foregoing Affidavit, acknowledged that (s)he executed the same in the capacity stated therein and for the purposes therein contained.

IN WITNESS WHEREOF, I hereunto set my hand and seal.

Elizabeth A. Hammett  
(Notary Public Signature)

SEAL:



Commission Expires: January 31, 2016

## Certification Application: Main Summary



[Main](#) | [Documents](#) | [Signature](#) | [Submit](#) | [Q & A](#) | [Utilities](#) | [Cert List](#)

**Excelsior Consulting Services Inc.**

Application Type: **New MBE/WBE/BEPD Application**

Application Number: **4696273**

Application status: **Received & In Process**

Application started: **4/25/2014**

Submitted: **5/6/2014**

The application is currently being reviewed.

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### Application Information

Application Type: **New MBE/WBE/BEPD Application**  
 Certifying Agency: **City of Chicago**  
 Business Name: **Excelsior Consulting Services Inc.**  
 Current Status: **Received & In Process**  
 Application Number: **4696273**  
 Contact Person: **Sudhashree Kota** (Add user not on list)

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### Sections and Documentation

Section	Actions	Status
<b>Section I: General Information - Contact Information</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 10 completed of 10 required; 4 completed of 4 optional
<b>Section I: General Information - Business Profile</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 11 completed of 11 required; 0 completed of 0 optional
<b>Section II: Certification History</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 5/4/2014): 4 completed of 4 required; 0 completed of 0 optional
<b>Section III: Ownership Information</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 4 completed of 4 required; 0 completed of 0 optional
<b>Section III: Ownership Information - Compensation</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 1 completed of 1 required; 0 completed of 0 optional
<b>Section IV: Employee Information</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 6 completed of 6 required; 0 completed of 0 optional
<b>Section V: Facility Information</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 3 completed of 3 required; 0 completed of 0 optional
<b>Section VI: Financial Information</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 7 completed of 7 required; 0 completed of 0 optional
<b>Section VII: Licenses and Registrations</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 2 completed of 2 required; 0 completed of 0 optional
<b>Section VIII: Equipment Information</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 1 completed of 1 required; 0 completed of 0 optional
<b>Section IX: Inventory</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 4/25/2014): 3 completed of 3 required; 0 completed of 0 optional
<b>Section X: Service Agreements</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	Complete (Sudhashree Kota, 5/4/2014): 1 completed of 1 required; 0 completed of 0 optional
<b>Document List</b>	<input checked="" type="checkbox"/> <a href="#">View</a>	

Complete: 20 attached of 20 mandatory; 7 attached, 13 not applicable of 20 required

### Signature and Submittal

	Section	Actions	Status
<b>Signature</b>		 <input type="button" value="View"/>	Signed (Sudhashree Kota, 5/6/2014)
<b>Submittal</b>		 <input type="button" value="View"/>	Submitted (Sudhashree Kota, 5/6/2014)

### Receipt and Processing

	Section	Actions	Status
<b>Received</b>			Received (Angela Thomas, 5/12/2014)
<b>In Process</b>			Processing started (Angela Thomas, 5/12/2014)

#### Customer Support

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## Certification: View

Certification List

Add Date Alert

Vendor Information 

Business Name	Sofbang, LLC
VendorID	20069478
Primary Owner's Name	Mr. Rajinder Duggal
Ethnic Group	Asian American
Gender	Male

Certification Information 

Certifying Agency	City of Chicago
Certification Type	MBE - Minority Business Enterprise
Effective Date	1/15/2014
Renewal/Anniversary Date	1/1/2015
Expiration Date	1/1/2019

Contact Information 

Main Company Email	
Main Phone	630-789-3659
Main Fax	888-630-9522
Internet Web Page	www.sofbang.com

Addresses 

Physical Address	145 TOWER DRIVE #1 BURR RIDGE, IL 60527
Mailing Address	145 TOWER DRIVE #1 BURR RIDGE, IL 60527

Business Capabilities 

Business certified for	NAICS 511210 Software publishers NAICS 518210 Data Processing, Hosting, and Related Services NAICS 541511 Custom Computer Programming Services NAICS 541512 Computer Systems Design Services NAICS 541519 Other Computer Related Services NAICS 541690 Other Scientific and Technical Consulting Services
Full Description of Capabilities/Products	NAICS 511210 Software publishers NAICS 518210 Data Processing, Hosting, and Related Services NAICS 541511 Custom Computer Programming Services NAICS 541512 Computer Systems Design Services NAICS 541519 Other Computer Related Services NAICS 541690 Other Scientific and Technical Consulting Services
Commodity Codes	NAICS 511210 Software publishers ( <a href="#">More</a> ) NAICS 541511 Custom Computer Programming Services ( <a href="#">More</a> ) NAICS 541519 Other Computer Related Services ( <a href="#">More</a> ) NAICS 541690 Other Scientific and Technical Consulting Services ( <a href="#">More</a> )

Owner Ethnicity and Gender 

Ethnic Group	Asian American
Gender	Male

DBE Ethnic Group

Sub Continent Asian American

**Location**



County

Cook (IL)

Certification List

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DEPARTMENT OF PROCUREMENT SERVICES

CITY OF CHICAGO

JAN 16 2014

Arabel Alva Rosales  
A. Alva Rosales & Associates, Ltd., d/b/a A.A.R. & ASSOCIATES, LTD.  
431 West Pershing Road, Floor 2  
Chicago, IL 60609

Dear Ms. Rosales:

We are pleased to inform you that A. Alva Rosales & Associates, Ltd., d/b/a A.A.R. & ASSOCIATES, LTD. has been recertified as a Minority Business Enterprise ("MBE") and Women Business Enterprise ("WBE") by the City of Chicago ("City"). This MBE/WBE certification is valid until 09/01/2016; however your firm's certification must be revalidated annually. In the past the City has provided you with an annual letter confirming your certification; such letters will no longer be issued. As a consequence, we require you to be even more diligent in filing your annual No-Change Affidavit 60 days before your annual anniversary date.

It is now your responsibility to check the City's certification directory and verify your certification status. As a condition of continued certification during the five year period stated above, you must file an annual No-Change Affidavit. Your firm's annual No-Change Affidavit is due by 09/01/2014, and 09/01/2015. Please remember, you have an affirmative duty to file your No-Change Affidavit 60 days prior to the date of expiration. Failure to file your annual No-Change Affidavit may result in the suspension or rescission of your certification.

Your firm's five year certification will expire on 09/01/2016. You have an affirmative duty to file for recertification 60 days prior to the date of the five year anniversary date. Therefore, you must file for recertification by 07/01/2016.

It is important to note that you also have an ongoing affirmative duty to notify the City of any changes in ownership or control of your firm, or any other fact affecting your firm's eligibility for certification within 10 days of such change. These changes may include but are not limited to a change of address, change of business structure, change in ownership or ownership structure, change of business operations, gross receipts and or personal net worth that exceed the program threshold. Failure to provide the City with timely notice of such changes may result in the suspension or rescission of your certification. In addition, you may be liable for civil penalties under Chapter 1-22, "False Claims", of the Municipal Code of Chicago.

Please note - you shall be deemed to have had your certification lapse and will be ineligible to participate as a MBE/WBE if you fail to:

121 NORTH LASALLE STREET, ROOM 806, CHICAGO, ILLINOIS 60602

W

- File your annual No-Change Affidavit within the required time period;
- Provide financial or other records requested pursuant to an audit within the required time period;
- Notify the City of any changes affecting your firm's certification **within 10 days** of such change; or
- File your recertification within the required time period.

Please be reminded of your contractual obligation to cooperate with the City with respect to any reviews, audits or investigation of its contracts and affirmative action programs. We strongly encourage you to assist us in maintaining the integrity of our programs by reporting instances or suspicions of fraud or abuse to the **City's Inspector General at [chicagoinspectorgeneral.org](http://chicagoinspectorgeneral.org), or 866-IG-TIPLINE (866-448-4754).**

Be advised that if you or your firm is found to be involved in certification, bidding and/or contractual fraud or abuse, the City will pursue decertification and debarment. In addition to any other penalty imposed by law, any person who knowingly obtains, or knowingly assists another in obtaining a contract with the City by falsely representing the individual or entity, or the individual or entity assisted is guilty of a misdemeanor, punishable by incarceration in the county jail for a period not to exceed six months, or a fine of not less than \$5,000 and not more than \$10,000 or both.

Your firm's name will be listed in the City's Directory of Minority and Women-Owned Business Enterprises in the specialty area(s) of:

**NAICS Code(s):**

**541512 - Computer Software Consulting Services or Consultants**

**541611 - General Management Consulting Services**

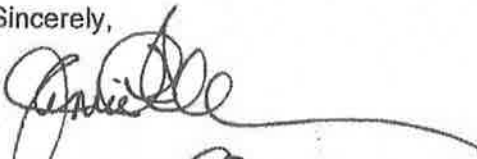
**541613 - Marketing Consulting Services**

**561330 - Employee Leasing Services**

Your firm's participation on City contracts will be credited only toward **Minority Business Enterprise and Women Business Enterprise** goals in your area(s) specialty. While your participation on City contracts is not limited to your area of specialty, credit toward goals will be given only for work that is self-performed and providing a commercially useful function that is done in the approved specialty category.

Thank you for your interest in the City's Minority and Women-Owned Business Enterprise (MBE/WBE) Program.

Sincerely,



Jamie L. Rhee   
Chief Procurement Officer

JLR/sl