

**CITY OF CHICAGO  
DEPARTMENT OF PROCUREMENT SERVICES  
ROOM 403, CITY HALL, 121 N. LASALLE STREET**

FOR NCRB USE ONLY	
Date _____	
Recommend Approval	☐
Return To Dept.	☐
Reject	☐
Vote	

**NON-COMPETITIVE REVIEW BOARD (NCRB)  
JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT**

**COMPLETE THIS SECTION IF NEW CONTRACT**

For contract(s) in this request, fill in each of the four (4) major subject areas below in accordance with the **Instructions for Preparation of Non-Competitive Procurement Form** on the reverse side. Complete "Other" subject area if additional information is needed. Subject areas must be fully completed. Responses merely referencing attachments will not be accepted.

Request that negotiations be conducted only with Oracle America, Inc. for the product(s) and/or service(s) described herein.

This is a request for:

One-Time Contractor Requisition #: <<Req No>>, copy attached or  Term Agreement or  Delegate Agency (Check one).

If Delegate Agency, this request is for "blanket approval" for all contracts within the <<proj description/name>> (Attach List).

Pre-Assigned Specification No.:         

Pre-Assigned Contract No.:         

**COMPLETE THIS SECTION IF AMENDMENT OR MODIFICATION TO CONTRACT**

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, as applicable. Attach copy of all supporting documents. Request approval for a contract amendment or modification to the following:

Contract #: 13033

Company or Agency Name: Oracle America, Inc.

Specification #: 47175

Contract or Program Description: Taleo Software and Data Hosting Services

Modification #:         

(Attach List, if multiple)

Christopher Owen

744-9233



Human Resources

12/07/2012

Originator Name  
(mm/dd/yr)

Telephone

Signature

Department

Date

<input checked="" type="checkbox"/> <b>PROCUREMENT HISTORY</b> See attached.
<input checked="" type="checkbox"/> <b>ESTIMATED COST</b> See attached.
<input checked="" type="checkbox"/> <b>SCHEDULE REQUIREMENTS</b> See attached.
<input checked="" type="checkbox"/> <b>EXCLUSIVE OR UNIQUE CAPABILITY</b> See attached.
<input checked="" type="checkbox"/> <b>OTHER</b> See attached.

APPROVED BY: 

DEPARTMENT HEAD OR DESIGNEE

DATE

12/7/2012

BOARD CHAIRPERSON

DATE

PRINT NAME

Soo Choi

PRINT NAME

CHIEF PROCUREMENT OFFICER

DATE OF APPROVAL

## INSTRUCTIONS FOR PREPARATION OF NON-COMPETITIVE PROCUREMENT FORM

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 Form" in which procurement is requested on a non-bid or non-competitive basis in accordance with 65 ILCS 5/8-10-4 of the Illinois Compiled Statutes. All applicable questions in each Subject Area below must be answered. 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. Also 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 notices and list of sources contacted)
4. Describe all research done to find other sources. (List other cities contacted, companies in the industry contacted, professional organizations, periodicals and other publications used).
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, why not?

### ESTIMATED COST

1. What is the estimated cost for this requirement (or for each contract, if multiple awards contemplated)? What is the funding source?
2. What is the estimated cost by fiscal year, if the job project or program covers multiple years?
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 experience 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, etc. possess. Is compatibility with existing equipment critical from an operational standpoint? Explain why?
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.

### 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 complete 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

Explain other related considerations and attach all applicable supporting documents, i.e., an approved ITGB form.

### REVIEW AND APPROVAL

This form must be signed by both Originator of the request and signed by the Department Head or authorized designee. After review and final disposition from the Board, this form will be signed by the Chairperson of the Board. After review and final disposition from the Board, this form will be signed by the Chief Procurement Officer for final approval.

## Procurement History

1. *Describe the requirement and how it evolved from initial planning to its present status.*

This is the continuation of a previous procurement for a Hiring and On Boarding software application. In 2006, the Department of Human Resources (“DHR”) entered into a contract with Taleo Corporation, recently purchased by Oracle America, Inc. (“Oracle”), to purchase software and to provide professional services to assist the City with the implementation of that software.

The contract with Oracle/Taleo will expire on February 28, 2013. We wish to continue to use the Taleo software. Because Taleo was recently purchased by Oracle, we have been working with the Department of Innovation and Technology (“DoIT”) on the best way to contract for the continued provision of the Taleo software license and related support as the City already does substantial business with Oracle. Our goal is for DoIT to acquire the Taleo software licenses through its existing contract with Oracle. In addition, the Taleo software would be added to the existing enterprise application support contract which covers all other Oracle software products. This will enable to the City to leverage its relationship with Oracle to obtain better pricing and more consistent support for the Taleo software.

Since DHR’s initial implementation of the Taleo software, Oracle/Taleo has made substantial enhancements to the software. The version that DHR currently licenses will no longer be supported by Oracle/Taleo after May 31, 2013. In continuing to license the Taleo software, we will need to migrate to the newest version of the software. As a result, DHR needs to procure professional services from Oracle/Taleo to assist with the migration. We are therefore requesting to extend our current contract until June 30, 2013 and amend the scope to cover the migration to the new platform.

2. *Is this a first time requirement or a continuation of previous procurement from the same source? If so, explain the procurement history?*

This is a continuing requirement. In 2006, in an effort to improve the City’s hiring processes and ensure compliance with the *Shakman* Consent Decree, the Department of Human Resources (“DHR”), in conjunction with the Mayor’s Office and the Department of Innovation and Technology (“DoIT”), began assessing options for implementing a new Hiring and On Boarding software application.

The previous on-line application, which was developed in-house, lacked automation of Applicant Scoring and Screening. In addition, the application, screening, and on-boarding processes were largely manual processes which were inefficient, costly, and time consuming.

The City’s objectives were to reduce the overall time to hire and improve the quality of applicants for positions by mirroring best practices in the private sector. In addition, in order to ensure Shakman compliance, the application needed to have adequate levels of effective and efficient review and control of the hiring process as well as increase transparency in the evaluation and selection of candidates.

The initial criteria were:

- An application that was easily configurable and maintainable.
- Integration with Oracle (CHIPPS) applications.
- Human Resource Management capabilities:
  - Workforce planning – demand and supply.

- Requisitioning – Job descriptions, approval workflows, job postings.
- Candidate acquisition – Referral management, ease of application process; candidate screening/assessment tools; candidate marketing.
- Applicant tracking – Applicant workflows; communication and correspondence capabilities; interview management; background checks; and on-boarding processes.
- Analytics – Regulatory reporting; standard and advanced metrics.
- Major areas of functionality
  - Resume scanning.
  - Job board posting.
  - Assessments that are easily tracked.
  - Robust search capabilities.
- Government experience was also desirable.

In selecting Taleo, there were several factors that informed the City's decision. Beyond meeting the initial criteria and passing the final evaluations conducted on the application, Taleo also provided the following advantages:

- Web-based system that was accessible anywhere, any time with a web browser and an internet connection.
- Taleo-hosted and maintained which meant a lower cost of ownership for the City.
- On Demand Infrastructure that was scalable and already supporting 475,000 active users and approximately 30 million applicants.
- Enterprise Class Hosting Infrastructure with over 44 million HTTP transactions every day.
- Secure architecture that already met the demands of many Fortune 500 companies.
- Integration friendly which makes it easier to automate transactions with internal systems and 3<sup>rd</sup> party service providers.
- Continuous, rapid stream of upgrades and enhancements with ease of future migration.

Implementation of the Taleo application took approximately two years and cost \$2,792,426. Phase I, which focused on the application and "scoring" process was completed in October of 2007 and consisted of the following:

- Mapping the City's hiring processes.
- Integration with CHIPPS.
- All on-line applications taken through Taleo.
- Candidates scored in Taleo and provided with immediate correspondence if they met the minimum qualifications for the position.
- Monitoring and oversight functionality to ensure compliance with the Shakman Accord.

Phase II of the project, which focused on Candidate Management and Workflow was completed in October of 2008, and consisted of the following:

- Establishing content, including screening criteria for over 300 titles.
- Full applicant screening functionality, including applicant interface.
- Separate application site and process for employees covered by a Collective Bargaining Agreement ("CBA") to conform with contractual requirements.
- Deployment of full Staffing WebTop functionality.

The City's court-approved Hiring Plan, which was required as part of the Shakman Accord, was developed at the same time that the City was implementing Taleo. Both the requirements of the Accord and Taleo's functionality were taken into consideration in drafting the Hiring Plan. In

addition, since the initial implementation, DHR has continued to add content, including job postings and screening criteria, for additional titles at the City. Furthermore, we have integrated other applications with Taleo since the additional implementation, including a payment engine for positions in the Police and Fire Departments where an application fee is required to cover the costs of test administration.

3. *Explain attempts made to competitively bid the requirement.*

As described above, prior to awarding a contract to Taleo, a search was conducted for an application that met the City's hiring needs and this was approved by the Sole Source Board. DHR will need to procure consulting and migration services from Oracle/Taleo. An attempt was made to bid similar consulting services out through a Task Order Request process in 2006 after the software was purchased but before it was implemented. That attempt was unsuccessful.

4. *Describe all research done to find other sources.*

See #2 above.

5. *Explain future procurement objectives. Is this a one-time request or will future requests be made for doing business with the same source?*

We anticipate that the City will continue to utilize Taleo as its hiring and on-boarding software for the foreseeable future. However, by adding Taleo to the existing enterprise application support contract, we will be able to get better rates and we will not have to bring future renewals to the Sole Source Board.

6. *Explain whether or not future competitive bidding is possible. If not, why not?*

Competitive bidding is ill-advised under these circumstances where the City has already invested substantial money, time, and effort in implementing an on-line application system that has met the City's hiring needs and is key to achieving substantial compliance under the Shakman Accord and ending Federal oversight of City hiring. In addition, the City attempted to bid for consulting services related to the implementation of the Taleo software and that attempt was unsuccessful. It is unlikely that an attempt to bid similar consulting services related to the migration of the Taleo software to a new Taleo platform would be successful. Oracle/Taleo is the expert when it comes to their own software.

### **Estimated Cost**

1. *What is the estimated cost for this requirement (or for each contract, if multiple awards contemplated)? What is the funding source?*

Professional Services – We have received an estimate of \$40,750 for consulting work related to the migration to Taleo v.12b. Funding will be provided from the Corporate budget.

2. *What is the estimated cost by fiscal year, if the job project or program covers multiple years?*

The estimated cost is \$40,750.00 for 2013.

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.).*

Oracle/Taleo provided the cost the consulting services related to the migration to the new system. The estimate for the consulting services was based on their knowledge of the City's current configuration and the customizations that were necessary for initial implementation.

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.*

As described above in the Procurement History section, the City spent \$2,792,426 implementing Taleo. This was obviously a substantial investment that would need to be duplicated if another source was considered. In the four years since the initial implementation was completed, DHR has spent more time creating job related content in Taleo which would also need to be duplicated if another source was considered. DHR has also created and integrated other software applications with Taleo, including a payment engine for Police and Fire positions where an application fee is required and a bargaining unit check for bid applications. Finally, because the City's Hiring Plan was developed when Taleo was being implemented, many of the requirements of the Hiring Plan are premised on Taleo's functionality which include a transparent applicant flow and extensive tracking which makes monitoring City hiring feasible. If another source was utilized, achieving substantial compliance under the Shakman Accord would be jeopardized as the Federal Monitor would want to be assured that any new platform met the requirements of the Hiring Plan.

5. *Explain what negotiation of price has occurred or will occur. Detail why the estimated cost is deemed reasonable.*

After Oracle/Taleo provided an initial estimate of costs, we asked for a discount based on the fact that we are a government agency that has been facing well-documented budget deficits. In addition, partly as a result of Oracle/Taleo's relationship with the City they have secured contracts with sister agencies and the County. Oracle/Taleo has indicated that there are discounts that can be applied to the cost proposal that was provided. While the cost estimates are not unreasonable, we believe we may be able to receive a better price, depending upon additional negotiations related to the software licensing.

### **Schedule Requirements**

1. *Explain how the schedule was developed and at what point the specific dates were known.*

The current contract with Oracle/Taleo expires on 2/28/2013. Oracle/Taleo will stop supporting the current version being used by DHR on May 31, 2013. We began working with Oracle/Taleo in May of 2012 to work on a procurement for the continued provision of the Taleo Software and Data Hosting Services.

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?*

n/a

- 3. Outline the required schedule by delivery or completion dates and explain the reasons why the schedule is critical.*

Our contract with Oracle/Taleo expires on February 28, 2013. In addition, Oracle/Taleo will no longer be supporting the City's version of Taleo after May 31, 2013. It is critical to have the new agreement in place prior to February 28, 2013. Oracle/Taleo has estimated that it will take approximately 4-6 weeks to migrate to the new version. This migration must take place prior to May 31, 2013 or the City will lose critical customer service support.

- 4. Describe in detail what impact delays for competitive bidding would have on City operations, programs, costs and budgeted funds.*

Competitively bidding out for a hiring and onboarding application would create significant delays which would negatively impact City operations. The initial implementation of Taleo took over two years and since the initial implementation, DHR has continued to upload content into the application. All of this would need to be recreated if a new hiring and onboarding application was selected which, in turn, would impact all hiring at the City.

#### **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, other factors make this person or firm exclusively or uniquely qualified for the project. Attach copy of cost proposal and scope of services.*

Oracle/Taleo is the manufacturer of their software and no other vendor has their domain expertise. In addition, the City has been using Taleo for hiring and onboarding since 2007 and the current Hiring Plan that was approved by the Federal Court in the Shakman litigation was drafted in conjunction with the implementation of Taleo. Process requirements in the Hiring Plan were established based on Taleo's functionality, particularly with respect to the transparency of application and requisition tracking which is what enables the Federal Monitor and IGO Hiring Oversight to audit and monitor City hiring. Taleo was instrumental in the implementation of the Taleo software when it was first implemented and they are well-versed in the specific requirements that the City has with respect to its hiring plan.

- 2. Does the proposed firm have personnel considered unquestionably predominant in the particular field?*

Since Oracle/Taleo is the manufacturer of their software, no other vendor has their domain expertise in migrating from one platform to another. In addition, Oracle/Taleo already knows and understands the customization that was necessary to integrate Taleo with other software systems.

- 3. What prior experience of a highly specialized nature does the person or firm exclusively possess that is vital to the job, project or program?*

Oracle/Taleo provided the professional services for the initial implementation of their software. In addition, they have continued to provide technical and customer support pursuant to the contract since the implementation. Oracle/Taleo understands the City's unique hiring processes which are mandated under the Shakman Accord. Taleo mapped all of the City's hiring processes and assisted in establishing job related content in the application. In addition, Taleo was instrumental in integrating Taleo with other City of Chicago applications, including Oracle/CHIPPS. No other vendor would be able to duplicate the expertise that Taleo now has with respect to the City's hiring processes and related software applications in implementing their software.

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?*

n/a

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?*

Oracle/Taleo is the manufacturer of their software and no other vendor has their domain expertise.

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, etc. possess. Is compatibility with existing equipment critical from an operational standpoint?*

n/a

7. *Is competition precluded because of the existence of patent rights, copyrights, trade secrets, technical data, or other proprietary data? Attach documentation verifying such.*

n/a

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.*

n/a

**Other (if available)**

1. *Explain other related considerations and attach all applicable supporting documents (an approved Information Technology Strategy Committee (ITSC) form, an approved Request for Individual Contract Services form, etc.).*

n/a



# DPS PROJECT CHECKLIST

## For DPS Use Only

Date Received  
 Date Returned  
 Date Accepted  
 CA/CN's Name

**IMPORTANT:** ALL INFORMATION SHOULD BE COMPLETED, ATTACH ALL REQUIRED MATERIALS AND SUBMIT FOR ROUTING TO THE DEPARTMENT OF PROCUREMENT SERVICES, ROOM 403, CITY HALL, 121 N. LASALLE STREET, CHICAGO, ILLINOIS 60602, ATTENTION: CHIEF PROCUREMENT OFFICER.

### General Information:

Date: 12/07/2012	Need by (estimated date): 1/16/2013	
Requisition No.: 76217	Contact Person:	Project Manager:
Specification No.: (if known) 47175	Christopher Owen	Alix Meza
PO No.: (if known) 13033	Telephone: -7449233	Telephone: -7449715
Modification No.: (if known)	Fax:	Fax:
Previous PO No.: (if known)	Email: christopher.owen@cityofchicago.org	Email: alix.meza@cityofchicago.org

Project Description: Hiring and Onboarding System - Migration to new platform.

### Funding:

City:	<input checked="" type="checkbox"/> Corporate	<input type="checkbox"/> Bond	<input type="checkbox"/> Enterprise	<input type="checkbox"/> Grant*	<input type="checkbox"/> Other:
State:	<input type="checkbox"/> IDOT/Transit	<input type="checkbox"/> IDOT/Highway		<input type="checkbox"/> Grant*	<input type="checkbox"/> Other:
Federal:	<input type="checkbox"/> FHWA	<input type="checkbox"/> FTA	<input type="checkbox"/> FAA	<input type="checkbox"/> Grant*	<input type="checkbox"/> Other:

LINE	FY	FUND	DEPT	ORGN	APPR	ACTV	PROJECT	RPTG	\$ DOLLAR AMOUNT
	012	0100	033	0994433	0149				

Term Estimated Value \$1500000

\*IF GRANT FUNDED, ATTACH COPY OF THE APPROVED GRANT AND APPLICATION AND ANY OTHER TERMS AND CONDITIONS OF FUNDING SOURCE THAT MAY APPLY. GRANT FUNDS MUST BE \_\_\_ COMMITTED OR \_\_\_ SPENT BY DEADLINE: \_\_\_\_\_ (DATE)

### Scope Statement:

Attached is a Detailed Scope of Services and/or Specification. E-mail softcopy in Microsoft Word to DPS Unit Manager

### IMPORTANT:

THIS IS A CRITICAL PORTION OF YOUR SUBMITTAL. IN ORDER FOR DPS TO ACCEPT YOUR SUBMITTAL YOU MUST COMPLETE THE SPECIFIC SCOPE REQUIREMENTS AS SET FORTH IN THE SUPPLEMENTAL CHECKLIST FOR THAT UNIT.

### Purchase Order Type (Check All That Apply):

<b>New Request</b>	<b>Modification/Amendment</b>
<input type="checkbox"/> Blanket/Term/DUR/Agreement	<input checked="" type="checkbox"/> Time Extension**
<input type="checkbox"/> Master Agreement (Task Order)	<input type="checkbox"/> Vendor Limit Increase
<input type="checkbox"/> Standard/One-Time Purchase	<input checked="" type="checkbox"/> Scope Change/Price Increase/Additional Line Item(s)
<b>Forms</b>	<input type="checkbox"/> Other (specify):
<input type="checkbox"/> Requisition	
<input type="checkbox"/> Special Approvals	
<input checked="" type="checkbox"/> Non-Competitive Review Board (NCRB)	

Contract Term: Three years

\*\* Requested Term (Number of Months): 4 months

### Pre-Bid/Submittal Requirements:

Mandatory Pre Bid/Submittal Conference?  Yes\*  No

Requesting Site Visit?  Yes  No

\*If yes, explain reasons why mandatory attendance is necessary.

# DPS PROJECT CHECKLIST

**The following is a general description of what should be included in a Scope of Services or Specification:**

A clear description of all anticipated services and products, including: time frame for completion, special qualifications of prospective vendors, special requirements or needs of the project, locations, anticipated participating user departments, citation of any applicable City ordinance or state/federal regulation or statute.

## ARCHITECTURAL/ENGINEERING SUPPLEMENTAL CHECKLIST

**Required Attachments:** Scope of Services, including location, description of project, services required, deliverables, and other information as required

**Risk Management**

- Current Insurance Requirements prepared/approved by Risk Management:  Yes  No
- Will services be performed within 50 feet of CTA train or other railroad property?  Yes  No
- Will services be performed on or near a waterway?  Yes  No

If applicable, Pre-Qualification Category No. Category Description:  
For Pre-Qualification Program, attach list of suggested firms to be solicited

Other Agency Concurrence Required: None State  Federal  Other \_\_\_\_\_

If Amendment request, please verify and provide the following:

- Contractor's Name:
- Contractor's Address:
- Contractor's e-mail Address:
- Contractor's Phone Number:
- Contractor's Contact Person:

Attach Recommendation of MBE/WBE/DBE Analysis Form  Yes  No

## AVIATION CONSTRUCTION SUPPLEMENTAL CHECKLIST

DOA sign-off for final design documents:  Yes  No

**Required Attachments:**  
Copy of Draft Contract Documents and Detailed Specifications

**Risk Management:**

- Current Insurance Requirements prepared/approved by Risk Management:  Yes  No
- Will work be performed within 50 feet of CTA or ATS structure or property?  Yes  No
- Will work be performed airside?  Yes  No

\*NOTE: Any non-construction Aviation request, complete the applicable section.

Do bid documents contain Sensitive Security Information (SSI)? Yes\* No Redacted  
\*If yes, attach Confidentiality Statement

Attach Recommendation of MBE/WBE/DBE Analysis Form  Yes  No

If Amendment request, please verify and provide the following:

- Contractor's Name:
- Contractor's Address:
- Contractor's e-mail Address:
- Contractor's Phone Number:
- Contractor's Contact Person:

# DPS PROJECT CHECKLIST

## COMMODITIES SUPPLEMENTAL CHECKLIST

### Required Attachments:

- Detailed Specifications (Scope of Services) including detailed description of the product, delivery location, user department contact, price escalation considerations
- Bidder's qualification, contract term and extension options
- Contractor's qualifications, citation of any applicable City/State/Federal statutes or regulations, citation of any applicable technical standards
- Price Lists/Catalogs, technical drawings and other exhibits and attachments as appropriate.

Attach Recommendation of MBE/WBE/DBE Analysis Form

Yes  No

Is this a Revenue Producing contract?

Yes  No

If Modification request, please verify and provide the following:

Contractor's Name:

Contractor's Address:

Contractor's e-mail Address:

Contractor's Phone Number:

Contractor's Contact Person:

## CONSTRUCTION SUPPLEMENTAL CHECKLIST

### Required attachments:

Copy of Draft (80% Completion), Contract Documents and Detailed Specifications

### Risk Management

Current Insurance Requirements prepared/approved by Risk Management:

Yes  No

Will services be performed within 50 feet of CTA train or other railroad property?

Yes  No

Will services be performed on or near a waterway?

Yes  No

Attach Recommendation of MBE/WBE/DBE Analysis Form

Yes  No

If Modification request, please verify and provide the following:

Contractor's Name:

Contractor's Address:

Contractor's e-mail Address:

Contractor's Phone Number:

Contractor's Contact Person:

## PROFESSIONAL SERVICES SUPPLEMENTAL CHECKLIST

### If New Request (Check applicable boxes):

Is this a Request for Information (RFI)?

Yes  No

Is this a Request for Qualifications (RFQ)?

Yes  No

Is this a Request for Proposal (RFP)?

Yes  No

If RFQ or RFP, did any outside Consultant provide advice or deliverables in developing the RFQ or RFP?

Yes\*  No

\*If yes, Company Name: PO#

Attach a narrative explaining the consulting services and deliverables provided.

Is this a Non-Competitive Procurement?

Yes\*  No

\*If yes, attach completed Non-Competitive Justification form, vendor proposal and completed MBE/WBE compliance plan (Schedules C-1 and D-1) submitted to the Non-Competitive Review Board.

Is this a request for Individual Contract Services?

Yes\*  No

\*If yes and you seek a sole source contract to hire a person as a Consultant, attach completed Office of Compliance "Request for Individual Contract Services" approval form signed by Department Head, Office of Compliance & OBM.

Is this a Revenue Producing contract?

Yes  No

Does this request involve the purchase of Software?

Yes\*  No

\*If yes, is City required to sign a software license?

Yes\*  No

\*If yes, attach descriptions of software and software license agreement.

**PROFESSIONAL SERVICES SUPPLEMENTAL CHECKLIST (continued)**

**Required Attachments (IF RFP/RFQ OR SOLE SOURCE):**

- Statement of Work (SOW), Deliverables or Scope of Services defined
- Does SOW involve any work in the public way?  Yes\*  No
- \*If yes, attach list of locations.
- Does SOW involve any public improvement to property that requires performance bond or prevailing wage?  Yes\*  No
- \*If yes, attach list of locations.
- Is City Council approval required?  Yes  No
- Project or Program Background Information
- Project Goals and Objectives
- Qualifications or Licenses/Certifications required for any disciplines
- Evaluation Criterion desired in RFP or RFQ
- Evaluation Committee (EC) members recommended. Attach list of names, titles and departments
- Technical and/or Functional Requirements, if applicable
- Cost Proposal/Schedule of Compensation structure (If Sole Source, over Contract Term by Milestone Deliverables)
- If an Information Technology (IT) project valued at \$100,000.00 or more, attach approval transmittal sheet from Information Technology Governance Board (ITGB)

Attach Recommendation of MBE/WBE/DBE Analysis Form  Yes  No

**If Amendment request, please verify and provide the following:**

Contractor's Name: **ORACLE**  
 Contractor's Address: **500 ORACLE PARKWAY, REDWOOD SHORES, CA 94065**  
 Contractor's e-mail Address: **SCOTT.SCHOENICK@ORACLE.COM**  
 Contractor's Phone Number: **(847) 888-8488**  
 Contractor's Contact Person: **SCOTT SCHOENICK**

**VEHICLES/HEAVY EQUIPMENT SUPPLEMENTAL CHECKLIST**

**Required Attachments:**

- Detailed Specifications including detailed description of the vehicle(s) or equipment, mounted equipment, if any, and options/accessories
- Special Provisions (Delivery, Warranty, Manuals, Training, Additional Unit Purchase Options, Bid Submittal Information, etc.)
- Delivery Location(s)
- Technical Literature
- Drawings, if any
- Part Number List (Manufacturer, or Dealer; or Other Source)
- Current Price List(s)/Catalog(s)
- Special Approval Form
- Exhibits and Attachments

Attach Recommendation of MBE/WBE/DBE Analysis Form  Yes  No  
Is this a Revenue Producing Contract?  Yes  No

**If Modification request, please verify and provide the following:**

Contractor's Name:  
 Contractor's Address:  
 Contractor's e-mail Address:  
 Contractor's Phone Number:  
 Contractor's Contact Person:

**WORK SERVICES/FACILITY MAINTENANCE SUPPLEMENTAL CHECKLIST**

**Required Attachments:**

- Detailed Specifications (Scope of Services) including detailed description of the work, locations (with supporting detail), user department contacts, work hours/days, laborer/supervisor mix, compensation and price escalation considerations
- Bidder's qualification, contract term and extension options
- Contractor's qualifications, citation of any applicable City/State/Federal statutes or regulations, citation of any applicable technical standards
- Price Lists/Catalogs, technical drawings and other exhibits and attachments as appropriate
- If an Information Technology (IT) project valued at \$100,000.00 or more, attach approval transmittal sheet from Information Technology Governance Board (ITGB)

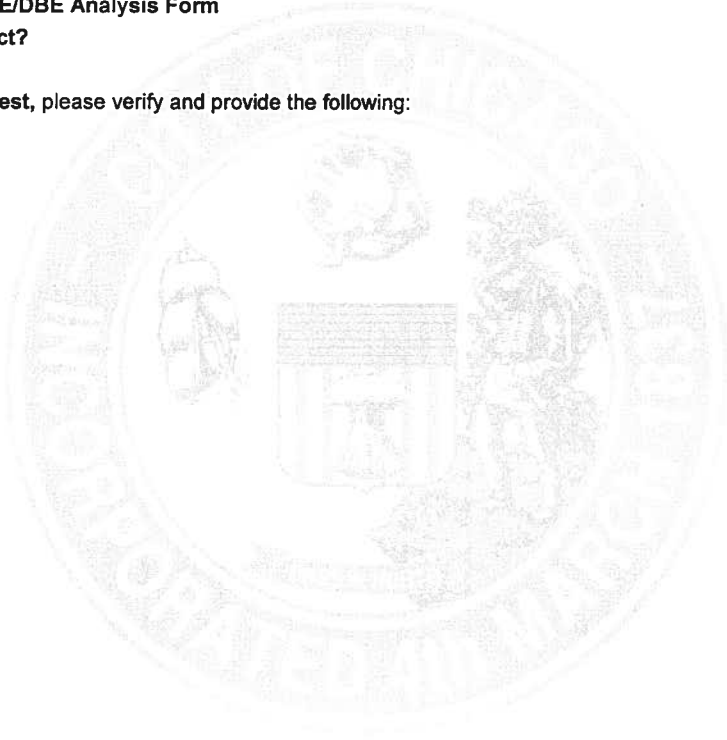
**Risk Management:**

- Will services be performed within 50 feet (50') of CTA train or other railroad property?  Yes  No
- Will services be performed on or near a waterway?  Yes  No
- Will services require the handling of hazardous/bio-waste material?  Yes  No
- Will services require the blocking of streets or sidewalks which may affect public safety?  Yes  No

- Attach Recommendation of MBE/WBE/DBE Analysis Form  Yes  No
- Is this a Revenue Producing contract?  Yes  No

**If Modification or Amendment request, please verify and provide the following:**

- Contractor's Name:
- Contractor's Address:
- Contractor's e-mail Address:
- Contractor's Phone Number:
- Contractor's Contact Person:






DEPARTMENT OF HUMAN RESOURCES  
CITY OF CHICAGO

MEMORANDUM

TO: Jamie L. Rhee, Chief Procurement Officer  
Department of Procurement Services

FROM:   
Soo Choi, Commissioner  
Department of Human Resources

RE: Sole Source Justification for Taleo Hiring and Onboarding Software System

DATE: December 7, 2012

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The Department of Human Resources is requesting a Non-Competitive Procurement with Oracle America, Inc. to migrate to the most current version of the Taleo software which the City has been using for recruiting, hiring, and onboarding since 2007. The software was a critical component in the City's efforts to improve the City's hiring processes and ensure compliance with the *Shakman* Accord. The City invested substantial money, time, and effort in implementing the Taleo software.

Earlier this year, Taleo was acquired by Oracle America, Inc. As the City already does substantial business with Oracle, we have been working with the Department of Innovation and Technology ("DoIT") on the best way to approach continuing for the provision of the software licensing and related support services. The plan is for DoIT to obtain the software licenses with their existing contract with Oracle. In addition, the Taleo software would be added to the existing enterprise application support contract which covers all other Oracle software products. This will enable to the City to leverage its relationship with Oracle to obtain better pricing and more consistent support for the Taleo software.

As part of the continued provision of the Taleo Software, we will need to migrate to a new platform, as the platform the City is currently using will no longer be supported after May 31, 2013. As a result, professional services will be required to assist with the migration to the new platform. This one-time requirement will cost approximately \$40,750.00. We are requesting to amend the scope of our current contract, which expires on February 28, 2013, and extend the contract to June 30, 2013. This will give us enough time to migrate to the new Taleo platform.

Although we requested that Oracle submit their price quotation without any included "Terms and Conditions" their contracting process does not allow for this. We have submitted the documentation that we received from Oracle regarding price for the statement of work for the software migration of the proposed agreement. However, the terms and conditions that they included will need to be further negotiated.

The employees who will be participating in the Non-Competitive Review Board meeting are: Christopher Owen, First Deputy Commissioner; Alix Meza, Assistant Commissioner; and Chrissy Batorski, Assistant Commissioner; and Brenna Berman, the First Deputy Commissioner for DoIT.

Please let me know if you have any questions or need any additional information.

## SCOPE OF SERVICES

The Scope of Services provides for the following services packaged as part of a Gold Upgrade Package for Taleo Recruiting.

### Services:

1. Impact Analysis with recommendations
  - a. Review of your Zone configuration
  - b. Interview and validate configuration with your team
  - c. Identify and document key recommendations for Oracle 12 upgrade
2. Customer Zone migration coordination
  - a. Coordination of staging Customer zone migration and/or creation with Oracle's Production organization (as per Staging Zone Plan selected by your team)
  - b. Coordination of Production Customer zone migration with Oracle's Production organization
3. Base Assistance for Core User Experience Changes with an Oracle-led review of general navigation changes
4. Review of changes to Manager View with an Oracle-led review of new key functionality available to former
5. Requisition, Candidate and Offer Fields and Form configuration
  - a. Field Configuration
    - i. Association of OLF to candidate fields migrated from 7.5, as required
    - ii. Association of security levels to requisition, candidate and offer fields migrated from 7.5, as required
    - iii. Association of requirement levels to candidate and offer fields migrated from 7.5, as required
  - b. User Defined Forms and Files
    - i. Configuration of up to four (4) requisition and/or candidate files
6. User Configuration Enhancements
  - a. Configuration Profile
    - i. Configuration changes to up to two (2) Configuration Profiles available at migration
    - ii. Configuration changes to up to two (2) Center Stages available at migration  
Note: at time of SOW creation Customer is not running User Import integrations via Taleo Connect.
  - b. User Type Management
    - i. Review of new User Type configuration options and migration impacts, including unified User Types and User Type creation  
Note: At time of SOW creation Customer is not running User Import integrations via Taleo Connect.
  - c. User Group Management
    - i. Review of new User Group configuration options and migration impacts, including domains, search and reporting impacts
7. Ad Hoc functional consulting hours
  - a. A maximum of Forty (40) hours of functional consulting for knowledge transfer and/or implementation of additional functionality beyond those items documented above. These hours are at the direction of Customer. It is optimal to pre-schedule these hours to provide consistency in the resource delivering the ad hoc hours.
8. Configuration of and knowledge sharing on the following functionality:
  - a. Field Configuration
  - b. User Defined Forms and Files
  - c. Configuration Profile
  - d. User Type Management
  - e. User Group Management
9. Upgrade Project Management



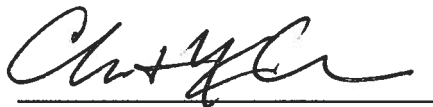
- a. Creation and development of a detailed project plan and project management of Taleo Recruiting upgrade activities.
10. Post migration quality assurance, and stabilization
  - a. Provide post upgrade assistance with final *issues review and transition to support*.
  - b. *Provide consulting* support to make configuration adjustments and answer new release questions during initial two weeks post deployment. At Customer request and if there are consulting hours available to do so, consulting support may be provided later than the initial two weeks post deployment.

#### **Assumptions**

1. Integration, Single Sign-on (SSO) and Reporting migration activities are not in scope for this SOW
2. Incident management (not including escalations) is not included in scope. Customer is responsible for entering any incidents as necessary.
3. The work documented in this SOW will be completed remotely and any request by Customer for Oracle travel will result in a mutually agreed upon Change Order.
4. Customer will review the Release Notes and new release webinars available to Customers prior to the migration project commencement.
5. Upon execution of this SOW, there is a 2 – 4 week waiting period for consultant assignment.
6. It is optimal for the Customer to attend the following recommended educational offerings available through Oracle University.
  - Public Course – New Features for End Users (Course REC-EU-UPGRADE) virtual course
  - Public Course – New Recruiting Features for System Administrators (REC-SA-UPGRADE) virtual course

#### **Zone Migrations**

- 1) Migration date planning for the migration of the production zone is a complex task. As such:
  - a. Oracle requires a minimum of 6 week's notice to Oracle before the Production zone can be migrated.
  - b. Upon signature of this SOW, you and your Oracle Client Executive will work with Oracle Production to get a date confirmed for the migration of your zones. The migration date shall be set within two (2) weeks of the date of the final signature on this SOW.
  - c. The migration date will not be confirmed until execution of this SOW.
  - d. Cancellation Policy: Due to pre-work activities necessary for the migration, Customer cannot request any cancellation of a migration process later than 5 days prior to the planned migration start date.
  - e. Any change request to the production zone migration date will require Oracle's review. A maximum of one (1) production zone migration date change. Additional zone creation/copy/migration shall be considered out of scope work and will be invoiced.



Christopher Owen  
First Deputy Commissioner



Alix Meza  
Assistant Commissioner



1910 Oracle Way  
Reston, VA 20190

Phone: 703.364.0295  
Fax: 703.364.3029

October 30, 2012

Christopher Owen  
First Deputy Commissioner  
Department of Human Resources  
City Hall, Room 1100  
Chicago, IL 60602

RE: Sole Source Letter for Taleo Hiring and Onboarding System

Dear Mr. Owen:

This letter is to confirm that Oracle is the only vendor that has the unique expertise and capabilities required for the continued provision of Taleo software and data hosting services and support services for the City's existing recruiting, hiring, and onboarding system.

Taleo has provided the City of Chicago with access to its industry-leading products since 2007, providing the City with the capability to efficiently source, screen, select, hire and onboard Candidates to fill open positions with the City in compliance with all applicable federal, state and local laws. Taleo's proprietary knowledge and expertise were instrumental in the initial two-year configuration of the system which resulted in the City's receipt of the "2008 Taleo Innovation Award," an independently judged recognition of the unique capabilities provided to the City by the Taleo solution.

Oracle has acquired Taleo and is now the sole provider of the Taleo software and data hosting services currently being utilized by the City. Oracle holds all patents and exclusive proprietary software rights on all application programs that support the City's hosted services. No other vendor can convert proprietary data or provide database expansion services, interfaces to external data sources or make modifications to products that are legally authorized to be marketed by Oracle under penalty of patent infringement laws of the United States.

Oracle looks forward to continuing the relationship that Taleo maintained with the City of Chicago and will continue providing unparalleled services to the City in the future. Please contact me at your convenience if you have any questions or require additional information.

Sincerely,

Su Kwak  
Senior Corporate Counsel  
[su.kwak@oracle.com](mailto:su.kwak@oracle.com)  
703-364-0295



1910 Oracle Way  
Reston, VA 20190

Phone: 703.478.9000  
Fax: 703.318.6340

August 20, 2012

Department of Human Resources  
Soo Choi, Commissioner  
11<sup>th</sup> Floor, City Hall  
121 North LaSalle Street  
Chicago, IL 60602

RE: Waiver of MBE/WBE Goals

Dear Ms. Choi:

The City of Chicago Department of Human Resources (“DHR”) is seeking to contract with Oracle America, Inc. (“Oracle”) for the continued provision of Taleo Software and Data Hosting Services and Maintenance and Support Services for a period of one year. As part of this contract, DHR has informed Oracle that Oracle needs to either meet the City’s MBE goal of 25% and WBE goal of 5% or seek a waiver from the City’s goals. Oracle hereby requests a waiver from the requirement to meet these goals.

The contract in question is for the continued provision of software and data hosting services and maintenance and support services in support of the City’s recruiting, hiring, and onboarding system. Oracle does not utilize subcontractors or otherwise outsource such work. As such, there are no opportunities for Oracle to utilize any DBE subcontractors, suppliers, or consultants or Socially and Economically Disadvantaged Individuals.

Oracle understands and appreciates the City’s intent behind its MBE/WBE goals. As a global company, Oracle embraces supplier diversity as part of its everyday business activities. Oracle has a robust Supplier Diversity (SD) Program through which Oracle works with a variety of suppliers to procure all of the products and services necessary for our business operations. We are committed to working with our suppliers on innovative and proficient methods of obtaining lower costs for the highest quality goods and services. We strive to build strong global and regional supplier partnerships to obtain these goals.

Oracle’s Supplier Diversity Program strives to create a diverse supplier base by identifying and encouraging diverse suppliers to compete for the products and services we purchase for the organization. Oracle endeavors, on a good faith efforts basis, to award contracts to suppliers that are small, HUBZone small, small disadvantaged, woman-owned small, veteran-owned small, and service-disabled veteran-owned small business concerns (collectively, “small business concerns”). Oracle seeks diverse suppliers that can deliver creative, high quality product and service solutions at competitive prices. Oracle tracks its procurement spending with small

business concerns as well as with minority-owned business enterprises (“MBE”), woman-owned business enterprises (“WBE”), and service-disabled veteran-owned businesses which may be other than small business concerns (collectively, “diverse suppliers”). Oracle can provide procurement spend reports by diverse supplier categories to the City upon request.

In addition, as part of Oracle’s ongoing outreach efforts to promote supplier diversity within its organization, Oracle is a member of the councils and industry groups set forth below. In addition, Oracle attends various events and roundtables related to these groups. Additional details can be provided by Oracle’s Supplier Diversity office upon request.

- National Minority Supplier Development Council (NMSDC)
- Women’s Business Enterprise National Council (WBENC)

Oracle’s Supplier Diversity Program has diverse supplier spending goals with the federal government and customer satisfaction requirements which we need to report out and increase business with a diverse supply base. These goals and requirements are measured by the amount of money Oracle spends with diverse companies as well as the opportunities for business Oracle gives to diverse business entities.

Oracle appreciates your consideration of this request and looks forward to providing services to the City of Chicago in the future.

Please contact me at your convenience if you have any questions or if you would like to discuss this matter in further detail.

Sincerely,



Su Kwak  
Corporate Counsel  
[su.kwak@oracle.com](mailto:su.kwak@oracle.com)  
703-364-0295



DEPARTMENT OF HUMAN RESOURCES  
CITY OF CHICAGO

MEMORANDUM

TO: Jamie L. Rhee, Chief Procurement Officer  
Department of Procurement Services

FROM:   
Soo Choi, Commissioner  
Department of Human Resources

RE: M/WBE Waiver Request/Oracle Contract

DATE: December 7, 2012

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I have reviewed the request from Oracle America, Inc. ("Oracle") dated August 20, 2012 wherein they request a waiver from meeting the City's MBE goal of 25% and WBE goal of 5%. As the contract for with Oracle is primarily for software and data hosting services related to the Taleo Recruiting and Onboarding System, and Oracle does not utilize subcontractors, in this instance, I concur with their request for a waiver.

Please let me know if you need any additional information.



CERTIFICATE OF FILING FOR  
CITY OF CHICAGO ECONOMIC DISCLOSURE STATEMENT

EDS Number: 37618

Certificate Printed on: 10/30/2012

Disclosing Party: Oracle America, Inc.  
Filed by: Su Kwak

Date of This Filing: 10/30/2012 05:14 PM

Original Filing Date: 10/30/2012 05:14 PM

Title: Senior Corporate Counsel

Matter: Amended and Restated Services  
Agreement between The City of Chicago  
Department of Human Resources and Taleo  
Corp. for Hiring and Onboarding System  
Applicant: Oracle America, Inc.

Specification #:

Contract #:

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://webapps.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.

**Participants for the Non-Competitive Review Board Meeting**

Christopher Owen, First Deputy Commissioner, DHR

Brenna Berman, First Deputy Commissioner, DoIT

Alix Meza, Assistant Commissioner, DHR

Chrissy Batorski, Assistant Commissioner, DHR



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
10/22/2012

**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> Marsh Risk & Insurance Services 1732 North First Street, Suite 400 San Jose, CA 95112 Attn: Connie Cano 408-467-5657  J15699-CAS-12-13	<b>CONTACT NAME:</b> <b>PHONE (A/C, No, Ext):</b> _____ <b>FAX (A/C, No):</b> _____ <b>E-MAIL ADDRESS:</b> _____  <table style="width: 100%;"> <tr> <th style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> <tr> <td>INSURER A : National Union Fire Ins Co Pittsburgh PA</td> <td style="text-align: center;">19445</td> </tr> <tr> <td>INSURER B : Safety National Casualty Corp.</td> <td style="text-align: center;">15105</td> </tr> <tr> <td>INSURER C : N/A</td> <td style="text-align: center;">N/A</td> </tr> <tr> <td>INSURER D : N/A</td> <td style="text-align: center;">N/A</td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : National Union Fire Ins Co Pittsburgh PA	19445	INSURER B : Safety National Casualty Corp.	15105	INSURER C : N/A	N/A	INSURER D : N/A	N/A	INSURER E :		INSURER F :	
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INSURER C : N/A	N/A														
INSURER D : N/A	N/A														
INSURER E :															
INSURER F :															
<b>INSURED</b> Oracle Corporation Attn: Bruce Cochran 500 Oracle Parkway MS50P664 Redwood Shores, CA 94065															

**COVERAGES**                                  **CERTIFICATE NUMBER:** SEA-002354339-01                                  **REVISION NUMBER:**

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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS			
A	GENERAL LIABILITY			GL4406453	06/01/2012	06/01/2013	EACH OCCURRENCE	\$ 1,000,000		
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000		
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						MED EXP (Any one person)	\$ 25,000		
	GEN'L AGGREGATE LIMIT APPLIES PER:									
	<input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC						PERSONAL & ADV INJURY	\$ 1,000,000		
							GENERAL AGGREGATE	\$ 2,000,000		
							PRODUCTS - COMP/OP AGG	\$ 2,000,000		
				DEDUCTIBLE:	\$ PER POLICY					
A	AUTOMOBILE LIABILITY			CA4982807 (AOS)	06/01/2012	06/01/2013	COMBINED SINGLE LIMIT (Ea accident)	\$ 2,000,000		
	<input checked="" type="checkbox"/> ANY AUTO			CA4982808 (MA)	06/01/2012	06/01/2013	BODILY INJURY (Per person)	\$		
	<input type="checkbox"/> ALL OWNED AUTOS	<input type="checkbox"/> SCHEDULED AUTOS					BODILY INJURY (Per accident)	\$		
	<input checked="" type="checkbox"/> HIRED AUTOS	<input checked="" type="checkbox"/> NON-OWNED AUTOS					PROPERTY DAMAGE (Per accident)	\$		
							SIR Value: Per Policy	\$		
	UMBRELLA LIAB						EACH OCCURRENCE	\$		
	EXCESS LIAB						AGGREGATE	\$		
	DED						RETENTION \$	\$		
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			LDM0500082	04/01/2012	04/01/2013	<input checked="" type="checkbox"/> WC STATUTORY LIMITS	\$		
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N	N/A	PS0500081(WI)	04/01/2012	04/01/2013	<input type="checkbox"/> OTHER	\$		
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT	\$ 1,000,000		
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000		
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000		

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
 Certificate of insurance is issued for evidence purposes only.

### CERTIFICATE HOLDER

### CANCELLATION

City of Chicago Department of Human Resources Attn: Christopher Owen, First Deputy Commissioner City Hall, Room 1100 121 North LaSalle Street Chicago, IL 60602	<p style="text-align: center;"><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>AUTHORIZED REPRESENTATIVE          of Marsh Risk &amp; Insurance Services  <i>Connie M. Cano</i></p>
--	--





**Statement of Work Prepared for  
The City of Chicago Department of Human Resources ("Customer")  
SOW #2012- 101-MIG  
Purchase Order Number [Input Field: Purchase Order Number]  
Client Executive: Scott Schoenick  
Oracle Representative: Sarah Muir**

This Statement of Work ("SOW") is entered into between Oracle America, Inc.. ("Oracle") and Customer as of the date set forth in the Customer signature block below ("Effective Date"). This SOW incorporates and is governed by the terms and conditions of the agreement Agreement dated February 20, 2007 in place between Oracle and Customer governing the provision of Oracle professional services to Customer ("Agreement"). In the event of any conflict, discrepancy or inconsistency between this SOW and the terms of the Agreement, the Agreement shall govern except as to scope of work, consulting fees (including currency), travel expenses and payment terms for which this SOW will govern. This SOW must be executed by February 28<sup>th</sup>, 2012 or Oracle may, at its option, consider this SOW null and void.

This SOW and the term "SOW" as used herein, includes this SOW and any amendments or addendums referencing this SOW that are mutually executed by the parties.

**1. PROJECT SCOPE**

See description of the services in attached Exhibit(s).

**2. PROJECT FEES AND INVOICING**

(a) This Time & Materials estimate shall be invoiced as set forth in the table below and payment is due 30 days from date of invoice. Oracle shall not be obligated to honor the consulting rates or services within this SOW beyond June 30, 2013.

<b>Project Role</b>	<b>Standard Hourly Rate in US Dollars</b>
Project Manager	\$250.00
Functional Consultant	\$225.00

(b) This SOW represents Oracle's best estimate with the information available at the time it was written as to the effort expected to complete the work described herein. Total fees for the in-scope work described in this SOW are estimated to be:

<b>Project Role</b>	<b>Estimated Hours</b>	<b>Estimated Fees</b>
Project Manager	28	\$ 7,000.00
Functional Consultant	150	\$ 33,750.00
<b>Grand Total Estimate</b>		<b>\$ 40,750.00</b>

**3. TRAVEL TIME**

Travel time is not applicable as Consulting Services within this SOW will be delivered remotely.

**4. ORACLE TRAVEL EXPENSES**

Travel expenses are not applicable as Consulting Services within this SOW will be delivered remotely.

**5. ORACLE COMMERCIAL PRODUCTS**

This SOW may require Oracle to configure functionality available in Oracle's commercial software products ("Oracle Products"). Customer acknowledges that Oracle will not complete any custom development or code level modifications with respect to the Oracle Products and that Oracle will retain all ownership rights in the Oracle Products as described in the Agreement, which governs access to and usage of any of the Oracle Products.

**6. CHANGE ORDERS**

Any Consulting or Education Services work requested and/or performed outside of the scope described in this SOW will require a mutually executed SOW change order or amended SOW, detailing the changes to the source SOW, whether such changes are revisions, additions or deletions, and any effect on costs ("**Change Order**"). The Change Order will be mutually agreed. In the event a Change Order is pending signature by Customer, Oracle will not complete work that is subject to the pending change until the Change Order is executed. Change Orders will be identified by and will otherwise incorporate the terms and conditions of the original SOW or will supersede and replace the original SOW.

**7. COUNTERPARTS**

This SOW may be executed in counterparts and exchanged by facsimile or electronically scanned copy exchanged via email. Each such counterpart shall be deemed to be an original and all such counterparts together shall constitute one and the same agreement. This SOW may also be executed via electronic signature pursuant to 15 U.S.C. Ch. 96 (and other relevant e-signature legislation). Electronic signatures will appear at the bottom of the page. The authorized representatives of the parties have executed this SOW by their signatures below:

The City of Chicago Department of Human Resources	Oracle America, Inc.
By:	By:
Authorized Signature	Authorized Signature
Date	Date
Name:	Name:
Title:	Title:
Email Address: _____ For return of countersigned copy	

**8. PURCHASE ORDER, BILLING AND PROJECT CONTACT INFORMATION:**

What Delivery choice is requested for the Invoice?  Email or  Mail

Billing Contact for this SOW		Primary Customer Project Contact	
<b>Name:</b>	[Charlita Fain]	<b>Name:</b>	Alix Meza
<b>Address:</b>	Dept. of Procurement Services, 121 N. LaSalle St., Chicago, IL 60606	<b>Address:</b>	11 <sup>th</sup> Floor, Dept. of Human Resources, 121 N. LaSalle St., Chicago, IL 60606]
<b>Phone:</b>	312.744.2025	<b>Phone:</b>	312 744 9715
<b>Email:</b>	charlita.fain@cityofchicago.org	<b>Email:</b>	alix.meza@cityofchicago.org
<b>Fax:</b>	312.744.7679	<b>Fax:</b>	[Input Field: FAX]

**EXECUTION INSTRUCTIONS:** Please follow execution instructions as detailed in email documenting Oracle's EchoSign Document Exchange which supports the electronic signature process including specific steps if you require a wet signature.

## EXHIBIT 1

The SOW provides for the following services packaged as part of a Gold Upgrade Package for Taleo Recruiting.

### Services:

1. Impact Analysis with recommendations
  - a. Review of your Zone configuration
  - b. Interview and validate configuration with your team
  - c. Identify key recommendations for Oracle 12 upgrade
2. Customer Zone migration coordination
  - a. Coordination of staging Customer zone migration and/or creation with Oracle's Production organization (as per Staging Zone Plan selected by your team)
  - b. Coordination of Production Customer zone migration with Oracle's Production organization
3. Base Assistance for Core User Experience Changes with an Oracle-led review of general navigation changes
4. Review of changes to Manager View with an Oracle-led review of new key functionality available to former Manager WebTop users
5. Requisition, Candidate and Offer Fields and Form configuration
  - a. Field Configuration
    - i. Association of OLF to candidate fields migrated from 7.5, as required
    - ii. Association of security levels to requisition, candidate and offer fields migrated from 7.5, as required
    - iii. Association of requirement levels to candidate and offer fields migrated from 7.5, as required
  - b. User Defined Forms and Files
    - i. Configuration of up to four (4) requisition and/or candidate files
6. User Configuration Enhancements
  - a. Configuration Profile
    - i. Configuration changes to up to two (2) Configuration Profiles available at migration
    - ii. Configuration changes to up to two (2) Center Stages available at migration  
Note: at time of SOW creation Customer is not running User Import integrations via Taleo Connect.
  - b. User Type Management
    - i. Review of new User Type configuration options and migration impacts, including unified User Types and User Type creation  
Note: At time of SOW creation Customer is not running User Import integrations via Taleo Connect.
  - c. User Group Management
    - i. Review of new User Group configuration options and migration impacts, including domains, search and reporting impacts
7. Ad Hoc functional consulting hours
  - a. A maximum of thirty (30) hours of functional consulting for knowledge transfer and/or implementation of additional functionality beyond those items documented above. These hours are at the direction of Customer. It is optimal to pre-schedule these hours to provide consistency in the resource delivering the ad hoc hours.
8. Configuration of and knowledge sharing on the following functionality:
  - a. Field Configuration
  - b. User Defined Forms and Files
  - c. Configuration Profile
  - d. User Type Management
  - e. User Group Management
9. Upgrade Project Management
  - a. Creation and development of a detailed project plan and project management of Taleo Recruiting upgrade activities.
10. Post migration quality assurance, and stabilization
  - a. Provide post upgrade assistance with final issues review and transition to support.