



## 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
Dept. of Technology and Innovation Contract Liaison	Eric Tenfelde	312-742-3765	6/13/2025	
Rosie Jimenez	Email Contract Liaison rosa.jimenez@cityofchicago.org	Telephone 312-744-6120		

### List Name of NCRB Attendees/Department

Eric Tenfelde  
Scott Huegel  
Rosie Jimenez

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

Company: Infor Public Sector

Contact Person:	Phone:	Email:
Jimi Stricklin	614-403-9746	jimi.stricklin@infor.com

Project Description: This is for a Vendor Limit Increase for Infor (16761).

This is a request for:

☐ New Contract

☒ Amendment / Modification

### Contract Type

### Type of Modification

☒ Blanket Agreement Term: 60 (# of mo)

☐ Time Extension

☒ Vendor Limit Increase ☐ Scope Change

☐ Standard Agreement

Contract Number: 16761

Specification Number: 61590

Modification Number: \_\_\_\_\_

Department Request Approval	Recommended Approval
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;">   <small>6A7B43F169154CD...</small>  <b>Nick Lucius</b> </div> <div style="text-align: right;">06/25/2025</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>DEPARTMENT HEAD OR DESIGNEE</div> <div>DATE</div> </div> <div style="text-align: center; margin-top: 5px;">Nick Lucius</div> <div style="margin-top: 10px;">PRINT NAME</div>	<div style="display: flex; justify-content: space-between; align-items: center; margin-top: 10px;"> <div>BOARD CHAIRPERSON</div> <div>DATE</div> </div> <div style="margin-top: 10px;">PRINT NAME</div>

### (FOR NCRB USE ONLY)

Recommend Approval/Date: \_\_\_\_\_

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

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

☐ Approved

☐ Rejected

\_\_\_\_\_  
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 Department of 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 the Department of Environment (Currently part of CDPH) and inspections for the Department of Planning and Development.
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 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  
On April 29, 2015 the contract was extended for 1 year to provide implementation support for the Hansen systems and professional services for additional implementation requirements.  
On June 13, 2016 the contract was extended for 1 year to provide maintenance and support for the Hansen systems and professional services for additional implementation of projects and requirements.  
On February 14, 2018, the contract was extended for 2 years with an optional 3rd year to provide maintenance and support for Hansen and professional services for additional implementation requirements.  
On November 26, 2019, the contract was extended for its optional 3rd year from the 2018 extension, and additional scope was added and approved to included project statements of work funded and prioritized by the IT Governance Board.  
On January 19, 2021, the contract was extended for 5 years to provide maintenance and support for Hansen and professional services for additional implementation requirements.
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. There is additional cost to the City restarting projects using a new vendor.
5. A potential exists to segregate maintenance/support from implementation services
6. Yes. Future competitive bidding is possible.

☒ **ESTIMATED COST**

1. \$1,099,645 is needed to cover licensing and maintenance for Hansen and IPS 11 software for the period 2/1/2025 through 1/31/2026. Corporate funds to cover licenses and standard software maintenance.
2. \$4,543,117 is needed to cover professional services for the helpdesk support of Hansen 7 and IPS 11 for a period from 2/1/2025 through 1/31/2026.
3. \$359,520 is needed to cover the CDOT 2025 Priorities project. This project will streamline the Commercial Refuse



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

Container permitting process and will help collect unreported vendor revenue.

4. \$829,320 is needed to cover additional workflow functionality added to DoB Upgrade Project Phase 1D, including plan-based permits.

The total of items number 1-4 above is \$6,831,602.

☒ **SCHEDULE REQUIREMENTS**

1. The schedule is driven by the maintenance and support needs of the City's user departments for Hansen 7 and IPS 11.
2. The City intends to procure Hansen 7 and IPS 11 product licenses and professional services using this contract. Drawing or any specific specification does not apply to components
3. Vendor is providing on going maintenance and support for Hansen 7 and IPS 11 for a number of City departments and it is essential that this contract be extended to continue this support.
4. Vendor is responsible for supporting implementations of Hansen 7 and IPS 11 for permits and inspections. In addition vendor is supporting Hansen 7, which is critical for Department of Buildings operations.

☒ **EXCLUSIVE OR UNIQUE CAPABILITY**

- This request for a new contract is not intended for hiring a person or firm.
2. Yes. Hansen 7 and IPS 11 are products owned by Infor and using their personnel for implementation and support produces quality deliverables.
  3. Vendor was responsible for implementing Hansen 7 and IPS 11 for the City. It is critical and efficient to use vendor's knowledge on City's business process and their experience with their product to complete projects and provide support.
  4. Infor is the owner of Hansen 7 and IPS 11 products used by the City to support permitting and inspection functions across multiple departments.
  5. Vendor has spent several years implementing and supporting Hansen 7 and IPS 11 with City and has an extensive knowledge of City's business processes related to inspection and permitting.
  6. N/A. This is a new request for the Hansen 7 and IPS 11, software implementation and support services.
  7. N/A. This is a new request for professional services to allow vendor to provide maintenance & support and post implementation support of future projects.
  8. Infor is the only vendor that has the unrestricted ability to access and modify Infor-owned software products in order to provide bug fixes, updates and upgrades as part of support and maintenance.

☐ **OTHER**

1. No additional supporting documentation 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.**



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: June 16, 2025

Department Name:

DTI

Requisition No:

669311

Specification No:

61590

PO No:

16761

Modification No:

Contract Liaison:

rosa@jimenez@cityofchicago.org

Telephone:

312-744-6120

Email:

rosa.jimenez@cityofchicago.org

Project / Program Manager:

Eric Tenfelde

Telephone:

312-742-3765

Email:

Eric.Tenfelde@cityofchicago.org

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

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Purchase Order Information:

Contract Term (No. of Months):

Extension Options (Rate of Recurrence):

Estimated Spend/Value:

\$

Grant Commitment / Expiration Date:

Pre-Bid/Submittal Conference: ☐ Yes ☐ No

☐ Mandatory ☐ Site Visit

☒ Modification or Amendment

Modification Information:

PO Start Date: 02/01/2025

PO End Date: 01/31/2026

Amount (Increase/Reduction): \$6,831,602

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

☐ Full Compliance

☐ Contract Specific Goals

☐ No Stated Goals

☒ Waiver Request

☒ Risk Management / EDS / IDOT

Insurance Requirements (included) ☒ Yes ☐ No

EDS Certification of Filing (included) ☒ Yes ☐ No

IDOT Concurrence (required) ☐ Yes ☐ No

For Blanket Agreements, the lead department must consult with other departments who may want to participate in 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 all parties
- 3) **ITGB:** IT project valued at \$100,000.00 or more, attach approval transmittal sheet.

\*Contract Liaison Signature

Rosa Jimenez  
DF20329753DB431...

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

Project

Title: INFOR PUBLIC SECTOR INC.  
NCRB Request for Vendor Limit Increase

Project

Description: Hansen and IPS Software License, Helpdesk, Maintenance and Support; EAM License, DoB Upgrade from H7 to IPS 11 Phases IE and IF

Funding:

☒ Corporate ☐ Bond ☐ Enterprise ☐ Grant ☐ Other:

☐ IDOT/Transit ☐ IDOT/Highway ☐ FHWA ☐ FTA ☐ FAA

LINE	FY	FUND	DEPT	ORGN	APPR	ACTV	PROJECT	RPTG	ESTDOLLAR AMOUNT
01	25	100	99	4406	138	0	0	0	\$ 5,331,957
01	25	100	06	2005	138	0	0	0	\$ 1,099,645
01	25	100	84	2135	149	0	0	0	\$ 400,000

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)  
☐ IDOT Concurrence

Contract Type:

- ☐ Architect Engineering ☐ Commodity ☐ Construction ☐ JOC ☐ SBI  
☒ Professional Services ☐ Revenue Generating ☐ Vehicle & Heavy Equipment  
☐ Work Service ☐ Joint Procurement ☐ Reference Contract

Safety Enhancing Vehicle Equipment (MCC 2-92-597) Yes \_\_\_ No \_\_\_

Modification/Amendment Type: VLI

- ☐ Time Extension ☐ Scope Change/Price Increase /Additional Line Item(s)  
☒ Vendor Limit Increase ☐ Requisition Encumbrance Adjustment  
☐ Other (specify):

Vendor Information

Name: Infor Public Sector

Contact: Jimi Stricklin

Address: 500 W Madison, Suite 2100, Chicago, IL 60661

E-mail: Jimi.Stricklin@infor.com

Phone: 614-403-9746

[illegible]

## Purchase Request Summary

Procurement Type:	Sole Source
Purpose of Request:	Vendor Limit Increase
Project Description:	Hansen 7 and Infor Public Sector (IPS) 11 Software License, Implementation, Maintenance & Support, and approved project work February 1, 2025 – January 31, 2026
Vendor Name:	INFOR PUBLIC SECTOR INC
Lead Department:	Department of Technology and Innovation
User Department:	Department of Technology and Innovation
User Contact:	Eric Tenfelde, 312.742.3765
Contract Start/EndDate:	02/01/2021- 01/31/2026
Estimated Cost/Contract Value:	<b>\$6,831,602</b>
Duration of Term (months):	N/A
Extension Options:	N/A
Exercised Extension Term:	N/A
Price Adjustment/VLI	
(Include supporting details):	<b>\$6,831,602</b>
Funding Source:	Corporate Funding for Licensing, Maintenance and Support
Need By Date:	August 1, 2025



CITY OF CHICAGO

DEPARTMENT OF TECHNOLOGY AND INNOVATION

**MEMORANDUM**

To: Sharla Roberts  
Chief Procurement Officer  
Department of Procurement Services

From: Nick Lucius  
Commissioner  
Department of Technology and Innovation

Date: June 13, 2025

Re: Hansen 7 and IPS 11 Software License, Implementation, Maintenance & Support. NCRB Request to increase vendor limit  
Infor Public Sector Inc.  
Req: 291932

Current/Expiring Contract Number: PO 16761  
Expiring Specification Number: 61590  
Original Start Date: 01/01/2009  
Original End Date: 12/31/2013  
Current End Date: 01/31/2026

DTI requests approval to increase the Vendor Limit on the contract for the period of February 1, 2021 through January 31, 2026. This increase is estimated to be \$6,831,602 and is needed to cover the following:

1. Hansen 7 and IPS 11 licensing and maintenance from 2/1/2025 through 1/31/2026.
2. Software implementation and support for a period from 2/1/2025 through 1/31/2026.
3. CDOT 2025 Priorities Project – This project will streamline the Commercial Refuse Container permitting process and will help collect vendor unreported revenue.
4. DoB Hansen 7 to IPS 11 Upgrade Project Phase 1D change order – this adds additional workflow functionality to the Phase 1D project, including Plan-based permits.

This Vendor Limit Increase will allow for the continued maintenance for license permits and support Hansen 7 and Infor Public Sector (IPS) 11 applications which are critical to the City of Chicago's operations.





## CITY OF CHICAGO



## DEPARTMENT OF TECHNOLOGY AND INNOVATION

Infor Public Sector Inc. maintains and supports the Hansen 7 and IPS 11 Systems. The Hansen 7 and IPS 11 Systems are utilized by various City Departments, including the Department of Transportation (CDOT), The Department of Buildings (DoB), the Department of Public Health, the Department of Planning and Development, Facilities and Fleet Management, and the Fire Prevention Bureau. Planned projects will provide critical business process functionality for Department of Cultural Affairs and Special Events and Business Affairs and Consumer Projection. These systems provide critical functionality such as permitting, inspection services, fee payments, online web portals and mobile solutions.

The Hansen system supports the property services business function for the Inspection & Permitting Initiative (IPI). Business processes included in the property services function relate to:

1. Applying, reviewing and issuing building and sign permits
  - Web purchase of permits not requiring plans
  - Web intake of applications for permits requiring plans (new construction, renovation)
2. Applying and renewing trade licenses for general contractors and the various trades
  - Validation of trade licenses when a permit application is taken
3. Tracking, scheduling, and recording results of inspections
  - Permit inspections
  - Certificate of Occupancy inspections
  - Annual inspections
  - Business License inspections
  - Complaint inspections
  - Re-inspections
4. Billing of annual inspections and elevator permit inspections
5. Tracking violations recorded in the inspection results
  - Creates a case that will be sent to Administrative Hearing or the Department of Law for prosecution in the Circuit Court
6. Tracking the status of vacant building complaints and displaying the action the City has taken as authorized by ordinance to remedy the complaint of the vacant building
7. Providing a website to register vacant buildings as required by ordinance

Infor is the only vendor that has the unrestricted ability to access and modify Infor-owned software products to provide bug fixes, updates and upgrades as part of support and maintenance.



CITY OF CHICAGO



DEPARTMENT OF TECHNOLOGY AND INNOVATION

We are currently working with the Department of Law and the vendor to create a new contract to begin starting 2/1/2026 to cover licensing, maintenance, and services needed for the expiration of contract 16761.

Attached are the sole source justification package, a Project Checklist, Statement of Work, EDS, and MBE/WBE compliance plan.

Thank you for your consideration to DTI's request. If additional information is required, please contact Eric Tenfelde at x2-3765 and [Eric.Tenfelde@cityofchicago.org](mailto:Eric.Tenfelde@cityofchicago.org) and/or Scott Huegel at x4-2654 and [Scott.Huegel@cityofchicago.org](mailto:Scott.Huegel@cityofchicago.org).

CC: S. Loboda/DPS  
T. Nanan/DPS  
M. Clark/DTI  
E. Tenfelde/DTI  
S. Huegel/DTI  
R. Jimenez/DTI

## **Scope of Work**

### **Specification Number 61590**

The City of Chicago desires to execute a Statement of Work with the Infor Public Sector Inc., to provide post implementation support for the Hansen system. The scope includes providing managed services and support of the City's Hansen and Infor Public Sector environments. These services include:

- Hansen 7 System support includes:
  - Application support for Hansen 7 back office permitting system for various departments, including the Dept. of Buildings and annual inspections for the Fire Prevention Bureau.
  - Technical support for the web portal application for online building permits, annual elevator inspections, trade license renewal and vacant building registrations.
  - Support interfaces to the City's GIS, collections (ARMS), and 311-/CSR systems.
  - Support Hansen mobile solutions
- IPS 11 System support includes:
  - Application support for IPS 11 functionality that allows for the issuance of CDOT Public way use, driveway, and private-benefit sign permits.
  - Application support for IPS 11 functionality that allows for the issuance of BACP Public way use and DCASE Special Event permits.
  - Application support for DoB's Annual Inspection Certification (AIC) project which enhanced & migrated the AIC website to the IPS 11 system and addresses audit functions.
  - Application support for IPS 11 back office permitting system for various departments such as the Department of Finance, annual inspections for the Fire Prevention Bureau, and environmental permits for the Department of Health (CDPH).
  - Technical support for web portal for 811 Dig tickets for CDOT and online permits for CDOT, DoB, BACP, DCASE, and CDPH.
  - Support interfaces to the City's GIS system and data portal website
- Hansen 7 and IPS 11 services includes:
  - System administration and maintenance
  - User administration and password resets
  - User functional/application support
  - Reporting support
  - Product patching as required
  - Work with Infor Chicago Project team as required and be responsible for the migration of any projects into the Hansen production environments.

In addition, Infor Public Sector Inc. will be providing services for additional implementation requirements for future process. This statement of work includes the above services to be continued through January 31, 2026.

Sincerely,

A handwritten signature in black ink that reads "ERIC TENFELDE". The signature is written in a cursive, slightly stylized font.

Eric Tenfelde, Customer Relationship Services Lead  
Department of Technology and Innovation



641 Avenue of the Americas  
New York, NY 10011  
800-260-2640  
infor.com

June 16, 2025

City of Chicago  
Department of Technology & Innovation  
ATTN: Mr. Eric Tenfelde  
2 N LaSalle, Suite #1010  
Chicago, IL 606042  
Acct# 1-372131 & 1-93791

Infor Chicago Support & Projects

Dear Mr. Tenfelde,

The following is an estimate for Support and Project work for the City of Chicago during the existing Contract Period. Infor looks forward to continuing to provide you with Services and Support.

The requested \$6,831,602 is for change orders approved as scope changes for the period February 1<sup>st</sup> 2021 through January 31<sup>st</sup> 2026.

1. One year period of professional service estimate for Helpdesk, implementation and support from February 1<sup>st</sup> 2025 through January 31<sup>st</sup> 2026 = \$4,543,117
2. One year period Hansen 7 and IPS 11 product license estimate = \$1,099,645
3. Budgetary estimate for CDOT 2025 Priorities Project which will streamline the Commercial Refuse Container permitting process and will help collect vendor unreported revenue = \$369,520
4. Budgetary estimate for DoB Hansen 7 to IPS 11 Upgrade Project Phase 1D change order which adds additional workflow functionality to the phase including plan-based permits = \$829,320

We look forward to continuing to provide the City with valuable software support and consulting services. If you have any questions or concerns, please contact the Program Director.

Jimi Stricklin – Director Public Sector Services [Jimi.Stricklin@infor.com](mailto:Jimi.Stricklin@infor.com)

Sincerely,

Jonathan Toomey  
Sr. Operations Director



CITY OF CHICAGO

DEPARTMENT OF TECHNOLOGY AND INNOVATION

## MEMORANDUM

To: Sharla Roberts  
Chief Procurement Officer  
Department of Procurement Services

From: Eric Tenfelde *ET*  
Customer Relationship Services Lead  
Department of Technology and Innovation

Date: July 07, 2025

Re: Description of Infor NCRB inputs  
Infor Public Sector Inc.  
PO 16761 Spec 61590  
Req No: 291932

Greetings. This memo serves to provide descriptions for the documents provided by Infor, which make up the inputs for the NCRB vendor limit increase for PO 16761 Spec 61590.

1. Maintenance & Support Renewal – This estimate, provided on July 6, 2020, is the original quote for 5 years' maintenance coverage for Hansen Support. We use the original quote to guarantee the pricing determined in 2020 without inflation. The only amount needed is \$1,099,644.80
2. Infor Help desk Services Work Order – This fixed fee services work order is the original quote for 5 years' Hansen application support and help desk support services. We use the original quote to guarantee the pricing determined in 2020 without inflation. The only amount needed is \$4,543,116.31
3. Infor Global Professional Services Change Order – This budgetary estimate of \$829,319.96 is needed to cover additional work needed for DoB for Trade Licenses and Plan-based permits. This estimate does not add new scope to the contract. It is to cover additional work not covered by the Infor Help Desk Services Work Order.
4. Infor Global Professional Services Change Order – This budgetary estimate of \$359,520 is needed to cover additional work needed for CDOT Commercial Refuse Containers project. This estimate does not add new scope to the contract. It is to cover additional work not covered by the Infor Help Desk Services Work Order.



CITY OF CHICAGO



DEPARTMENT OF TECHNOLOGY AND INNOVATION

These are the only amounts needed for the Vendor Limit Increase of Infor PO 16761. The requested VLI increase totals to \$6,831,602. Let me know if you have any questions or need any clarifications.

Cc: NCRB  
N. Lucius/DTI  
M. Clark/DTI  
S. Huegel/DTI  
R. Jimenez/ DTI



641 Avenue of the Americas  
New York, NY 10011  
800-260-2640  
infor.com

July 6, 2020

City of Chicago  
Dept of Innovation and Technology  
Eric Tenfelde  
333 S State St #420  
Chicago, IL 60604  
Acct# 1-372131, 93791

### Maintenance & Support Renewal

Hello Eric,

The following is an estimate for Maintenance & Support for your Infor software. Infor looks forward to continuing to provide you with product support in the future.

Payment is expected in full by the expiration date of the current term which will guarantee that you will not experience any interruption to your Infor Xtreme Support.

#### Hansen Support (Account # 1-372131)

Maintenance Coverage Dates	Amount Due	Due Date
10-4-20 / 2-14-2021 *	900.51	9/4/2020
2-14-2021/2-13-2022	977,020.16	2/13/2021
2-14-2022 / 2-13-2023	1,006,330.76	2/13/2022
2-14-2023 / 2-13-2024	1,036,520.69	2/13/2023
2-14-2024 / 2-13-2025	1,067,616.31	2/13/2024
2-14-2025 / 2-13-2026	1,099,644.80	2/13/2025
<b>TOTAL</b>	<b>5,188,033.22</b>	

#### Benefits

- Maintenance help desk 24 hours a day 5 days a week
- Ability to view and update your support incident history and status
- Product knowledge base
- Access to the latest product information about new releases
- Ability to download product upgrades and documentation
- Ability to submit feedback on Infor products and service

This estimate is based on software that is listed below for the City of Chicago. Assumes all previously invoiced maintenance has been paid. If any additional licenses are purchased, these amounts will

increase. Taxes may be applied to invoice if applicable. ***This is an estimate only and may be modified by Infor. An EXECUTED agreement is required to validate the pricing above.***

We look forward to assisting your company and providing you with valuable software support. If you have any questions or concerns, please contact us:

Shawwna Wagner: +1 470-481-5238 or [Shawwna.Wagner@infor.com](mailto:Shawwna.Wagner@infor.com)

Tonya Padgett: +1 470-481-6944 or [Tonya.Padgett@infor.com](mailto:Tonya.Padgett@infor.com)

Sincerely,

Infor  
Shawwna Wagner  
Tonya Padgett  
Senior Maintenance Business Manager





## Services Work Order

This **Fixed Fee** Services Work Order ("Work Order or SOW") is subject to all terms and conditions between Infor Inc. ("Infor") and City of Chicago ("Licensee") with an Effective Date of January 1, 2009, as amended (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.

In the event the capitalized terms in this Work Order differ from the terminology used in the Services Agreement, references herein to: "Affiliate" means any entity, directly or indirectly, controlling, controlled by, or under common control with, Infor "Licensed Software" means the generally available computer software programs licensed by Infor or its Affiliate to Licensee under a separate license agreement (a "License Agreement"); "Project" means the Services project described in this Work Order; and "Support" means the maintenance and/or support services offered by Infor or its Affiliate pursuant to a separate License Agreement and/or maintenance and support agreement with Infor or its Affiliate.

**Work Order Date: 5/1/2020**

**Effective Date: 5/1/2020**

**Work Order Number: OP-04229673**

**Prepared by: Alexander Acman**

### Project Overview:

<b>Project Name:</b>	<b>City of Chicago - Hansen Application Support and Help Desk Support Services</b>
<b>Objective:</b>	<p>This Work Order is to provide Hansen Application Support and Help Desk Support Services to Licensee for the ongoing support of Licensee's Hansen applications. Licensee has Hansen 7 and Infor Public Sector 11 production and various development/testing environments.</p> <p>This Work Order encompasses supporting the configuration and customizations of the base Infor Public Sector software and includes requested and prioritized work to further configure the base applications.</p> <p>Infor will triage all Production Change Requests (PCR)'s allocated and subsequently determine the resolution for any requests. Infor will also undertake responsibility for the creation, management, development and support of Releases. "Releases", as used herein, means the enhancements, issue resolutions, corrections, or changes that are created by the services as a result of PCR's, which are grouped together into a package for release into Production.</p> <p>This Work Order is for services starting February 1, 2021 and ending January 31, 2026 for a total fixed fee of \$21,430,328.00, to be billed monthly per the payment schedule outlined in this Work Order.</p>

### Project Scope and Deliverables

A. The current software applications to be supported include:

- Hansen CDR – Building Permits
- Hansen CDR – Use Permits
- Hansen CDR – Planning
- Hansen CRD – Projects
- Hansen CDR – Code Enforcement/Case Management

- Hansen Customer Services / Complaint Management
- Hansen – Buildings / Equipment
- Hansen Dynamic Portal for Permits
- Hansen Mobile Solutions
- Infor Public Sector Suite Rest Services
- Infor Field Inspector CDR
- City of Chicago's Permit, Inspection, License, Registration and 811 Chicago Portal
- Hansen GIS Interface
- Hansen Finance Interface
- Hansen CSR Interface
- Hansen IRIS Interface

B. The Scope of Services is as follows:

1. Infor Help Desk

- The Infor Help Desk will triage all PCR's that are allocated to them by Licensee's Department of Assets, Information, and Services (AIS) or the Licensee's end users. "End users" as used in this SWO means City of Chicago personnel and not the public.
- AIS first level support desk team will assign cases related to Hansen software applications which are outside the capabilities of the AIS team to Infor resources to work on resolution.
- The Infor Help Desk will be located onsite at AIS, and operate during the Licensee's business hours, which are between 8:30 AM to 5:00 PM US Central Time. Infor resources may work offsite with the approval of the Licensee. However, this approval may be revoked at the request of the Licensee.
- The Infor Help Desk will endeavor to remediate PCR's that are allocated to them. Any PCRs that are unable to be immediately remediated will be estimated for effort to complete and the AIS Project Manager will prioritize this PCR for inclusion in a maintenance Release.
- The Infor Help Desk will use reasonable efforts to provide response times in accordance with service levels listed in the Deliverables section below.
- Help Desk services will be provided based on the following target response times. Critical or Priority 1 PCRs are also referred to as Emergency PCRs:

Call Priority / Target Response Time	Severity	Description
Priority 1 < 1 Business Hour	Critical	City's business processes are halted or the production system definition is inoperative, and City is unable to process data and there is no work around available.
Priority 2 < 4 Business Hours	High	A critical business processing function is impaired, causing a serious disruption of a major business function, and there is no work around identified, causing a serious disruption to City's business.
Priority 3 < 8 Business Hours	Medium	A non-critical problem in the City's system definition where the City is able to continue to run the system and/or application, or a workaround is available, or a reported problem in the City System Definition that does not qualify as Priority 1 or 2.
Priority 4 < 12 Business Hours	Low	A general incident and/or low system impact issue of which does not require immediate attention. This includes any question or requests for information.

2. Support Services

2.1 Production Change Request Management and Control.

- Infor will provide a gatekeeper role for the Licensee's Hansen 7 and Infor Public Sector 11 production environments.
- All PCRs will be evaluated by Infor and are subject to pre-study of impact, execution, verification and documentation.
- Infor assigned resource(s) will participate in scheduled PCR meetings with the City to prioritize PCRs.
- Licensee and Infor have established a preliminary threshold of 40 hours of development time as the threshold which will determine whether a PCR request must be addressed as a separate project. This threshold may be adjusted by Infor and Licensee based on an assessment of the request during execution of the work associated with this Work Order. In either event, Infor and Licensee will monitor hours associated with PCR requests and use a process to prioritize such requests.
- Infor will have Releases moved to Production for approved and completed PCRs. The Release Schedule will be determined by the Licensee, after consultation with Infor.
- Infor will coordinate and manage the Release Schedule.
- Infor will work with Licensee to design PCR and other relevant solutions.
- Infor will perform configuration and development services necessary to complete PCRs.
- Infor will perform integration testing of PCRs.
- Infor will author test cases necessary for Licensee to perform UAT of PCRs.
- Infor will support the Licensee during User Acceptance Testing of a Release.
- Infor will manage the Production migrations as part of the Release Schedule.
- Infor will ensure Production migrations are done out of business hours and these are agreed to and scheduled with the Licensee

## 2.2 System Administration and Maintenance, and Application Support

- Provide system administration and maintenance.
- Provide updates to existing modifications.
- Support for report updates and creating new reports.
- Support for minor functional changes

## 2.3 Best Practices Guidelines

- Infor will facilitate all requirements gathering and design as part of this engagement, to ensure that best practices are considered and that recommendations are made to support the strategic growth of Infor Public Sector within the City's environment
- Infor will work with Licensee's end users to provide consulting advice and best practices to assist them in how their processes map to the functionality of the system

## **Staffing Model**

To support the helpdesk and application services in scope, Infor will provide the following FTE staff model in the table below. Resources will be approved by the licensees This model is based on each full-time resource (FTE) contributing approximately 1920 hours to the program annually. Resources unable to contribute at a full-time level due to leave or absence will be supplemented with other Infor or subcontractor resources. Changes in resources, other than short-term supplemental contractors, will require approval by the licensee.

	Task / Scope	FTE
1	Help Desk - Support	1.0
2	Help Desk - Support	1.0
3	Help Desk - System Admin	1.0
4	Support Services	1.0
5	Support Services	1.0
6	Support Services	1.0
7	Support Services	1.0
8	QA Resource	1.0
9	Reporting / Business Objects	1.0
10	Database Support	1.0
11	Project Management	1.0
12	Offshore Support Services	1.0
13	Offshore Support Services	1.0

**Assumptions and Licensee Obligations**

1. Licensee will provide first level support desk that will be initial point of contact for help desk requests.
2. Licensee will provide workspace to consultants assigned to work onsite.
3. Services are applicable only to currently installed environments. New installation activities are not in scope.
4. Licensee is responsible for the administration of the LAN and WAN.
5. Licensee is responsible for all technical architecture, networks, and hardware.
6. Licensee will be responsible for deploying any infrastructure for, and executing, any business continuity plans.
7. Planning, design, installation or testing of disaster recovery environments are not included within the scope of this Work Order.
8. Issues or problems related to third-party software, operating systems, database, network or hardware will be the responsibility of Licensee.

**Payment Schedule**

Licensee agrees to pay Infor a total fee of \$21,430,328.00 to be invoiced monthly, as indicated in the payment schedule below. All fees stated are in U.S. Dollars.

<b>Month</b>	<b>Year 1 Invoice Month-Year</b>	<b>Amount (USD)</b>
1	February - 21	336,375.00
2	March - 21	336,375.00
3	April - 21	336,375.00
4	May - 21	336,375.00
5	June - 21	336,375.00
6	July - 21	336,375.00
7	August - 21	336,375.00
8	September - 21	336,375.00
9	October - 21	336,375.00
10	November - 21	336,375.00
11	December -21	336,375.00
12	January - 22	336,375.00
	<b>Year 1 TOTAL</b>	<b>4,036,500.00</b>

<b>Month</b>	<b>Year 2 Invoice Month-Year</b>	<b>Amount (USD)</b>
13	February - 22	346,466.25
14	March - 22	346,466.25
15	April - 22	346,466.25
16	May - 22	346,466.25
17	June - 22	346,466.25
18	July - 22	346,466.25
19	August - 22	346,466.25
20	September - 22	346,466.25
21	October - 22	346,466.25
22	November - 22	346,466.25
23	December -22	346,466.25
24	January - 23	346,466.25
	<b>Year 2 TOTAL</b>	<b>\$4,157,595.00</b>

<b>Month</b>	<b>Year 3 Invoice Month-Year</b>	<b>Amount (USD)</b>
25	February - 23	350,860.32

26	March - 23	350,860.32
27	April - 23	350,860.32
28	May - 23	350,860.32
29	June - 23	350,860.32
30	July - 23	350,860.32
31	August - 23	350,860.32
32	September - 23	350,860.32
33	October - 23	350,860.32
34	November - 23	350,860.32
35	December -23	350,860.32
36	January - 24	350,860.32
	<b>Year 3 TOTAL</b>	<b>\$4,282,323.83</b>

<b>Month</b>	<b>Year 4 Invoice Month-Year</b>	<b>Amount (USD)</b>
37	February – 24	367,566.04
38	March – 24	367,566.04
39	April – 24	367,566.04
40	May – 24	367,566.04
41	June – 24	367,566.04
42	July – 24	367,566.04
43	August – 24	367,566.04
44	September – 24	367,566.04
45	October – 24	367,566.04
46	November – 24	367,566.04
47	December -24	367,566.04
48	January - 25	367,566.04
	<b>Year 4 TOTAL</b>	<b>\$4,410,792.54</b>

<b>Month</b>	<b>Year 5 Invoice Month-Year</b>	<b>Amount (USD)</b>
49	February – 25	378,593.03
50	March – 25	378,593.03
51	April – 25	378,593.03
52	May – 25	378,593.03
53	June – 25	378,593.03
54	July – 25	378,593.03
55	August – 25	378,593.03
56	September – 25	378,593.03
57	October – 25	378,593.03
58	November – 25	378,593.03
59	December -25	378,593.03
60	January - 26	378,593.03
	<b>Year 5 TOTAL</b>	<b>\$4,543,116.31</b>

**PAYMENT:** Each invoice is payable within sixty (60) days after receipt of invoice. This payment obligation is non-cancelable, and the amounts paid are non-refundable. Fees do not include applicable taxes, which will be added to each invoice, unless the licensee is a tax-exempt organization.



Where a substantial variation from this Order is foreseen both parties must agree in writing to the additional work and amend this Order accordingly.

**Locations:**

Services may be provided at the facilities of Infor or its contractors, or at the Licensee sites listed below.

City of Chicago - Assets, Information and Services  
333 S State Street, Suite 420  
Chicago, IL 60604  
United States

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

Infor (US), Inc.	City of Chicago
Signature :  DocuSigned by: 7953398BBA4ME6.....	Signature : 
Printed Name : Gregory M. Giangiordano	Printed Name : Eric Tenfelde
Title : SVP & General Counsel	Title : IT Director
Address : 13560 Morris Road Alpharetta GA 30004 USA	Address : City of Chicago Assets, Information and Services 333 State Street, Suites 420 Chicago, IL 60604 United States
Signed Date : 13 May 2020   08:18:00 EDT	Signed Date : 05/12/2020
	Purchase Order Number :
	eBilling (Email Address) :
	<b>Invoice Mailing Address if different from:</b> City of Chicago - Assets, Information and Services 333 State Street, Suite 420 Chicago, IL 60604 United States
	Address :
	Phone : 31-742-3765
	Email Address : eric.tenfelde@cityofchicago.org

	Contact Name : Eric Tenfelde
<b>INTERNAL USE ONLY</b>	
Primary Product :	ICS Approval ID:
Existing Project ID :	Existing Project Manager :
Opportunity ID : OP-04229673	Internal ID:



## Infor Global Professional Services Change Order

This Change Order ("Change Order"), effective as of the date of the last signature below, amends the work order identified below as the "Work Order." Capitalized terms not defined in this Change Order are defined in the Work Order.

<b>Customer Name ("Customer"):</b>	City of Chicago
<b>Work Order Effective Date ("Effective Date"):</b>	2/1/21
<b>Original Work Order Number:</b>	OP-04229673
<b>Project ID/Clarity ID:</b>	32497394
<b>Project Name:</b>	City of Chicago - Hansen Application Support and Help Desk Support Services
<b>Product:</b>	Hansen Products
<b>Change Order #:</b>	12
<b>Change Order Opportunity ID:</b>	
<b>Type of Change:</b>	For non-binding reference purposes only:
	Change to Scope of Services CO 9 Change of Scope and Additional Scope being included in this Change Order for Trade License and Plan Based Permits – 2025 Calendar Year and January 2026
	Change to Service Fees

## Change to Service Fees

### Fixed Service Fees

Infor will invoice Customer for the Service Fees in the table below in accordance with the Agreement or Work Order, as applicable.

<b>Fixed Service – Budgetary Estimate (Rough Order Of Magnitude)</b>	<b>Installment Payment for Fixed Service Fees (USD)</b>
Consulting Services	<b>\$ 829,319.96</b>
<b>Fixed Service Fees Total</b>	<b>\$ 829,319.96</b>





#### AIC Case Enforcement – De-Scope

AIC Code Enforcement was included in Change Order 9 but has been de-prioritized by the City of Chicago and subsequently included in DOB Phase 1E (CO 13).

Effort allocated to CO 9 for AIC Case Management has been consumed by the Support Team for other work prioritized by the City including (but not limited to):

- IPS 11 Upgrade
- CDPH 311 Integration
- CDOT Address Certificates
- 2025 R1
- 2025 R2

Support Resources Contributing to this Project	Role
Eric Plopper	Solution Architect / Design
Renee Griffin	Reports and Open Data
Todd Kyser	IPS Back Office Workflows
Bosu Kodali	Data Conversion Design and Contribution
Teri Osmon	Quality Assurance Lead
Bill Schmitt / Jonathan Younen	IPS Back Office
Raza Mian / Lakshmi Kommaraju	Web Development / Payments
Ravi Gudala / Thirupathi Salendra / Nikita Rane / Lavanya Kolli / Kamlesh Sonawani	Infrastructure, Environment Management, SIT and UAT Readiness, Go Live Preparation and Execution, Back Office Development
Jean Bryant / Supriya Bari	Project Governance

#### Fixed Service Fees—Milestone Payments

Infor will invoice Customer for the Service Fees in the table below in accordance with the Agreement or Work Order, as applicable.

Milestone #	Milestone Description	Date	Installment Payment for Fixed Service Fees (USD)
1	<b>Design Sign Off for Trade Licenses (Aug 2025)</b> Completion and Sign Off of Design by DOB for Trade Licenses	Aug 2025	\$ 50,000
2	<b>Design Sign Off for Plan Based Permits (Aug 2025)</b> Completion and Sign Off of Design by DOB for Plan Based Permits	Aug 2025	\$ 50,000
3	<b>Back Office, Web, Integration Conference Room Pilot for Trade Licenses (Company, Supervisor, Apprentice)</b>	Aug 2025	\$ 50,000



Milestone #	Milestone Description	Date	Installment Payment for Fixed Service Fees (USD)
	Back office and Web configuration based on approved Design Workflows for Trade Licenses.		
4	<b>Back Office, Web, Integration Conference Room Pilot for Plan Based Permits</b> Back office and Web configuration based on approved Design Workflows for Plan Based Permits.	Sept 2025	\$ 50,000
Monthly Billing: Beginning August 2025 until January 2026 \$104,886.66 per month, including Weekly Status Reports.			\$629,319.96
<b>TOTAL</b>			<b>\$829,319.96</b>

### Description of Change(s)

Description of Change
<p><b><u>DOB 1D – Change of Scope for CO 9 – Removal of Scope and Addition of Scope - 2025</u></b></p> <p><b>Scope of Work:</b>  <b>Phase 1D, already described in CO 9, will now include the following, this includes development of the scope identified below in IPS 11 and the Web Portal (where defined), as well as Data Migration, Reporting and Open Data.</b> For the purposes of clarity, this Change Order only covers the identified additional scope for Trade Licenses and Plan Based Permits. Change Order 9 supports the previously agreed scope of Wreck Permit and Generator Periodics.</p> <ul style="list-style-type: none"> <li>• Trade Licenses for Company - Electrical, Plumbing, Mason, General Contractor</li> <li>• Trade Licenses for Supervisor – Electrical, Plumbing, Mason</li> <li>• Trade Licenses for Apprentice - Plumber</li> <li>• Plan Based Permits</li> </ul> <p><b>Upon Design Sign-off by DOB the following will begin:</b></p> <p><b>Design and Workflow Creation:</b></p> <ul style="list-style-type: none"> <li>• Develop Workflows for Company, Supervisor and Apprentice Trade Licenses</li> <li>• Develop Workflows for Plan Based Permits</li> <li>• Ensure all applications include necessary configurations such as status checks, validations, reporting, reviews, inspections, data migrations for back office and web portal components.</li> </ul> <p><b>Configuration:</b></p> <ul style="list-style-type: none"> <li>• Tailor application configurations with detail pages, status checks, validations, applicant capabilities, reviews and holds, inspections, attachments, fees, roles, reporting, email notifications, batch tasking, data migrations and adjustments for web portal components.</li> <li>• Update of necessary environments for seamless integration.</li> </ul> <p><b>Integration:</b></p> <ul style="list-style-type: none"> <li>• Thorough configuration testing to validate all system settings, and ensuring integrations align with specified requirements and operate as intended.</li> </ul>



### Description of Change

#### Testing and Support:

- Conduct comprehensive testing including Test Case development, Systems Integration Testing (SIT) and User Acceptance Testing (UAT).
- Provide end user training and support during the UAT Phase.

#### Go Live and Support:

- Execute the Go Live phase and provide post Go Live support.
- Monitor application performance and make necessary adjustments based on user feedback to ensure optimal performance and user satisfaction.

#### Proposed Project Resource Roles and Allocation:

Role	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26
Web – Mark Kinney				100%	100%	100%
Web – Satish Vandnapu				100%	100%	100%
Web – Orlando Owens				100%	100%	100%
Web – Keerthi Doppalapudi				100%	100%	100%
QA – Arpitha Reddy				100%	100%	100%
QA – Phyllis Kelly				100%	100%	100%
Data – Dheeraj Kaparathi				100%	100%	100%
GDS BO – New Resource	100%	100%	100%	100%	100%	100%
GDS BO – New Resource	100%	100%	100%	100%	100%	100%
GDS BO – Nikita Rane				100%	100%	100%
GDS BO – Lavanya Kolli				100%	100%	100%

### General Assumptions and Obligations:

#### General Assumptions

1. It is assumed that DOB Phase 1D project billing will be based on the completion of predefined milestones, and a fixed monthly invoicing schedule. Each Milestone will trigger an invoice corresponding to the objectives achieved, ensuring alignment between payment and project progress. It is assumed that payments will be made promptly upon receipt of the invoice to maintain project momentum and ongoing resource allocation
2. The delivery of Milestones assumes the utilization of the Support Team, as well as the listed Resource Roles, including existing Back Office resources for development and infrastructure management, Web resources for Web Portal infrastructure / development, Back Office workflows / development / security, Solution Architect, Reporting / Open Data resource as well as Project Governance. The availability and allocation of these resources will be managed to optimize efficiency and effectiveness. This structure is contingent upon resource availability, ensuring efficient and timely delivery of all project objectives. The Support Team, under the current Five-year Support Contract, will be actively engaged throughout all phases of this project.
3. Should the scope of work outlined in this Change Order not be completed within the designated timeframes, the Support Team will be responsible for completing any outstanding deliverables. The final payment associated with Milestone 7 shall be due upon the successful completion of Go Live and Post Go Live support activities.



### General Assumptions

4. The scope and effort outlined in this Change Order are based on the current understanding of the Requirements. Any material changes to these Requirements may necessitate adjustments to this Change Order. Such changes will be managed through the established Project Change Control Process.
5. Design signed off in a timely manner.
6. If design changes are received after construction has started, these will be assessed to see if the Project Change Control Process needs to be initiated.
7. City resources are available when needed.

### General Obligations

1. Any Requirements not specified in this Change Order will be addressed using the Project Change Control Process.
2. Licensee acknowledges that any delays or changes caused by the Licensee, Licensee's employees, Contractors, vendors or equipment may cause an increase in the fees required under this Change Order, including without limitation delays or changes to the following:
  - a. Change to or deficiency in the information which Licensee has provided to Infor;
  - b. Failure by Licensee to perform any of its responsibilities in a timely manner including the supply to Infor or resources and information;
  - c. An unanticipated event that changes the service needs or requirements of the Licensee

Changes required to this Change Order as a result of the foregoing events will be handled with the Project Change Control Process.
3. For all services provided at Licensee locations, Licensee will provide office facilities to Infor personnel. This includes, but is not limited to: office space, desk, networked computers, secured filing cabinets if required, team meetings rooms, networked printers, photocopier, telephones, stationery, whiteboards, internet and remote VPN connection.

### Scope Specific Assumptions

Assumption #	Scope	Assumptions
1	AIC Case Management	This item has been de-scoped from Change Order 9 and new scope for Trade Licenses and Plan Based Building has been included in this CO (CO 12).
2	Additional GDS Back Office Development Resource	Two new GDS resources have been included to ensure that this project can be delivered in a timely manner with the addition of this new scope for 1D.
3	Design Sign-Off	It is assumed that the Design will be reviewed with the City and then subsequently signed off by the City in a timely manner to ensure that Infor are able to maintain the schedule they have committed to. Any significant changes to the Design once development has begun will need to be managed through the agreed Change Control Process and could lead to an amended Go Live date.
4	Prioritization of Resources	The re-prioritization of Infor resources could affect the agreed Go Live date.
5	Support Contract Resources	Infor Resources that are included on the Support Contract will be utilized as needed to support Infrastructure tasks, Solution Design, Reports and Open Data, Data Conversion, Quality Assurance Back Office and Web Development (as needed) These Support Resources will book their time to the Support Contract Project.



Assumption #	Scope	Assumptions
6	Project Governance Resources	Project Governance will be executed as part of the Support Contract.

Locations
<p>Services may be provided at the facilities of Infor or its contractors, or at the Customer sites listed below.</p> <p>City of Chicago - Department of Technology &amp; Innovation 2 N La Salle St, Suite 1010 Chicago, IL 60602 United States</p>

Budgetary Estimate



## Infor Global Professional Services Change Order

This Change Order ("Change Order"), effective as of the date of the last signature below, amends the work order identified below as the "Work Order." Capitalized terms not defined in this Change Order are defined in the Work Order.

<b>Customer Name ("Customer"):</b>	City of Chicago
<b>Work Order Effective Date ("Effective Date"):</b>	2/1/21
<b>Original Work Order Number:</b>	OP-04229673
<b>Project ID/Clarity ID:</b>	32497394
<b>Project Name:</b>	City of Chicago - Hansen Application Support and Help Desk Support Services
<b>Product:</b>	Hansen Products
<b>Change Order #:</b>	14
<b>Change Order Opportunity ID:</b>	
<b>Type of Change:</b>	For non-binding reference purposes only:
	Change to Scope of Services – CO 14 – New Project CDOT Commercial Refuse Container (CRC) Project and any other City defined projects – 2025 Calendar Year plus January 2026
	Change to Service Fees

## Change to Service Fees

### Fixed Service Fees

Infor will invoice Customer for the Service Fees in the table below in accordance with the Agreement or Work Order, as applicable.

<b>Fixed Service – Budgetary Estimate (Rough Order Of Magnitude)</b>	<b>Installment Payment for Fixed Service Fees (USD)</b>
Consulting Services	<b>\$ 359,520</b>
<b>Fixed Service Fees Total</b>	<b>\$ 359,520</b>



Support Resources Contributing to this Project	Role
Renee Griffin	Reports and Open Data
Todd Kyser	IPS Back Office Workflows
Bosu Kodali	Data Conversion Design and Contribution
Teri Osmon	Quality Assurance Lead
Raza Mian / Lakshmi Kommaraju	Payments
Ravi Gudala / Thirupathi Salendra / Kamlesh Sonawani	Infrastructure, Environment Management, SIT and UAT Readiness, Go Live Preparation and Execution
Jean Bryant / Supriya Bari	Project Governance

### Fixed Service Fees—Milestone Payments

Infor will invoice Customer for the Service Fees in the table below in accordance with the Agreement or Work Order, as applicable.

Milestone #	Milestone Description	Date	Installment Payment for Fixed Service Fees (USD)
1			\$
	Monthly Billing: \$71,904 per month from September 2025 to January 2026		\$ 359,520
		<b>TOTAL</b>	<b>\$ 359,520</b>

### Description of Change(s)

Description of Change
<p><b><u>CDOT – Commercial Refuse Containers (CRC) – New Project Along With Other Identified Project(s) – Length of Change Order is 4 Months</u></b></p> <p><b>Scope of Work – CDOT CRC Project:</b>  The CDOT Commercial Refuse Containers (CRC) Project, will include the following, this includes development of this scope in IPS 11 and the Web Portal (where defined), as well as Data Migration, Reporting and Open Data.</p> <p>The scope of this project includes creating a streamlined and efficient workflow for managing Commercial Refuse Container Permits, minimizing manual intervention and ensuring timely renewals.</p> <p>Providers will be able to easily update and manage their permits through the web portal, with the system automatically validating and processing the uploaded data. This reduces errors and speeds up the renewal process, automates tracking of new and updated permit applications, the generation of corresponding fees, and ensures transparency and accountability for both providers and administrators.</p>



### Description of Change

The final outcome will be timely fee payments, accurate permit records, and a closed renewal process that maintains up-to-date information for all involved parties. Additionally, the ability to search historical permits by address provides an easy way to access past records, improving accessibility and customer service.

**Upon receipt of Design Sign-off from CDOT the following will begin:**

#### Design and Workflow Creation:

- Develop Workflows for CRC
- Ensure all applications include necessary configurations such as status checks, validations, reporting, reviews, inspections, data migrations for back office and web portal components.

#### Configuration:

- Tailor application configurations with detail pages, status checks, validations, applicant capabilities, reviews and holds, inspections, attachments, fees, roles, reporting, email notifications, batch tasking, data migrations and adjustments for web portal components.
- Update the environment for seamless integration.

#### Proposed Project Resource Roles and Allocation:

Role	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26
Solution Architect	100%	100%	100%	100%	100%
GDS Back Office	100%	100%	100%	100%	100%
Web .Net (Mexico)	100%	100%	100%	100%	100%

### General Assumptions and Obligations:

#### General Assumptions

1. It is assumed that billing will be based on the completion of predefined milestones, and a fixed monthly invoicing schedule. Each Milestone will trigger an invoice corresponding to the objectives achieved, ensuring alignment between payment and project progress. It is assumed that payments will be made promptly upon receipt of the invoice to maintain project momentum and ongoing resource allocation
2. The delivery of Milestones assumes the utilization of the Support Team, as well as the listed Resource Roles, including infrastructure management, Reporting / Open Data resource as well as Project Governance. The availability and allocation of these resources will be managed to optimize efficiency and effectiveness. This structure is contingent upon resource availability, ensuring efficient and timely delivery of all project objectives. The Support Team, under the current Support Contract, will be actively engaged throughout all phases of this project.
3. Should the scope of work outlined in this Change Order not be completed within the designated timeframes, the Support Team will be responsible for completing any outstanding deliverables. The final payment associated with Milestone 3 shall be due upon the successful completion of Go Live and post go Live support activities.
4. The scope and effort outlined in this Change Order are based on the current understanding of the Requirements. Any material changes to these Requirements may necessitate adjustments to this Change Order. Such changes will be managed through the established Project Change Control Process.
5. Designs signed off in a timely manner.





### General Assumptions

6. If design changes are received after construction has started, these will be assessed to see if the Project Change Control Process needs to be initiated.
7. City resources are available when needed.

### General Obligations

1. Any Requirements not specified in this Change Order will be addressed using the Project Change Control Process.
2. Licensee acknowledges that any delays or changes caused by the Licensee, Licensee's employees, Contractors, vendors or equipment may cause an increase in the fees required under this Change Order, including without limitation delays or changes to the following:
  - a. Change to or deficiency in the information which Licensee has provided to Infor;
  - b. Failure by Licensee to perform any of its responsibilities in a timely manner including the supply to Infor or resources and information;
  - c. An unanticipated event that changes the service needs or requirements of the Licensee

Changes required to this Change Order as a result of the foregoing events will be handled with the Project Change Control Process.
3. For all services provided as Licensee locations, Licensee will provide office facilities to Infor personnel. This includes, but is not limited to: office space, desk, networked computers, secured filing cabinets if required, team meetings rooms, networked printers, photocopier, telephones, stationery, whiteboards, internet and remote VPN connection.

### Scope Specific Assumptions

Assumption #	Scope	Assumptions
1	Support Contract Resources	Infor Resources that are included on the Support Contract will be utilized as needed to support Infrastructure tasks, Reports and Open Data, Data Conversion and Quality Assurance. These Support Resources will book their time to the Support Contract Project.
2	Project Governance Resources	Project Governance will be executed as part of the Support Contract.
3	.Net Web Developers	To support a reduction in cost of implementation, it has been assumed that a .Net Web Development resource would be secured in Mexico and would be 100% allocated to this Change Order.
4	Additional GDS Back Office Development Resource	A new GDS back office resource based in India has been included to ensure a separate back office development resource has been allocated 100% to this Change Order,
5	Design Sign-Off	It is assumed that the Design will be reviewed with the City and then subsequently signed off by the City in a timely manner to ensure that Infor are able to maintain the schedule they have committed to.  Any significant changes to the Design once development has begun will need to be managed through the agreed Change Control Process and could lead to amended Go Live date.
6	SIT, UAT and Go Live	It has been assumed that SIT, UAT and Go Live would be part of a planned Support Release, therefore negating the need to have



Assumption #	Scope	Assumptions
		additional time / budget allocated to this Change Order to support these activities.
7	Undefined Projects Included in this Change Order	This Change Order is to support the implementation of the CDOT CRC project as well as any other projects prioritized by DTI over the period of this one-year Change Order.
8	Length of Change Order	This Change Order is for one year only and is to provide a part time Solution Architect (shared with CO 13), along with a back-office developer based in India and a .Net developer based in Mexico.

Locations
<p>Services may be provided at the facilities of Infor or its contractors, or at the Customer sites listed below.</p> <p>City of Chicago - Department of Technology &amp; Innovation                  2 N La Salle St, Suite 1010                  Chicago, IL 60602                  United States</p>

Budgetary Estimate



641 Avenue of the Americas  
New York, NY 10011  
800-260-2640  
infor.com

May 1, 2025

City of Chicago  
Department of Technology & Innovation  
ATTN: Mr. Eric Tenfelde  
2 N LaSalle, Suite #1010  
Chicago, IL 606042  
Acct# 1-372131 & 1-93791

Dear Mr. Tenfelde:

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

Infor is the copyright owner for 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 Jimi Stricklin, the Director of Services Public Sector for your account, at 614-403-9746 or [Jimi.Stricklin@infor.com](mailto:Jimi.Stricklin@infor.com), if you have additional questions on this matter.

Sincerely, Jonathan Toomey Sr Operations Director

Signed by:  
  
Jonathan Toomey  
For Infor Public Sector, Inc.  
C2BF7E5FFFF2413...

28 April 2025 | 15:56:24 EDT

## **INSURANCE REQUIREMENTS**

### **DTI [PO 16761] Software**

Contractor must provide and maintain at Contractor's own expense, during the term of the Agreement and during the time period following expiration if Contractor is required to return and perform any work, services, or operations, the insurance coverages and requirements specified below, insuring all work, services, or operations related to the Agreement.

#### **A. INSURANCE REQUIRED FROM CONTRACTOR**

##### **1) Workers' Compensation and Employer's Liability**

Workers' Compensation Insurance, as prescribed by applicable law covering all employees who are to provide a service under this Agreement and Employer's Liability coverage with limits of not less than \$**1,000,000** each accident; \$**1,000,000** disease-policy limit and \$**1,000,000** disease-each employee, or the full per occurrence limits of the policy, whichever is greater.

The Contractor may use a combination of primary and Excess/Umbrella policy/policies to satisfy the limits of liability required herein. The Excess/Umbrella policy/policies must provide the same coverages/follow form as the underlying policy/policies.

##### **2) Commercial General Liability**

Commercial General Liability Insurance or equivalent must be maintained with limits of not less than \$**1,000,000** per occurrence and \$**2,000,000** aggregate. The policy shall be written on an occurrence basis, with coverage at least as broad as the Insurance Services Office (ISO) Commercial General Liability Form CG 00 01 (current edition), or equivalent. This insurance shall include, but not be limited to, coverage for bodily injury, personal injury, and property damage liability (including loss of use), personal and advertising injury, products and completed operations, premises and operations liability, contractual liability, no exclusion for damage to work performed by subcontractors, any limitation of coverage for designated premises or project is not permitted, and any endorsement modifying or deleting the exception to the Employer's Liability exclusion is not permitted. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 05 09 or 25 04 05 09 or equivalent), or the general aggregate limit shall be twice the required occurrence limit.

The City must be provided additional insured status with respect to liability arising out of Contractor's work, services or operations and completed operations performed on behalf of the City. The City's additional insured status must apply to liability and defense of suits

arising out of Contractor's acts or omissions, whether such liability is attributable to the Contractor or to the City. The full policy limits and scope of protection also will apply to the City as an additional insured, even if they exceed the City's minimum limits required herein. A copy of the physical 'Additional Insured' endorsement must accompany the Certificate of Insurance when submitted. Contractor's liability insurance must be primary without right of contribution by any other insurance or self-insurance maintained by or available to the City.

The Contractor may use a combination of primary and Excess/Umbrella policy/policies to satisfy the limits of liability required herein. The Excess/Umbrella policy/policies must provide the same coverages/follow form as the underlying policy/policies.

### 3) **Automobile Liability**

A Business Auto Policy covering any motor vehicles (owned, non-owned and hired) which are used in connection with work, services, or operations to be performed, must be maintained by the Contractor. Limits of not less than \$**1,000,000** per accident for bodily injury and property damage and covering the ownership, maintenance, or use of any auto whether owned, leased, non-owned or hired used in the performance of the work or services. The City is to be added as an additional insured on a primary, non-contributory basis. A copy of the physical 'Additional Insured' endorsement must accompany the Certificate of Insurance when submitted.

The Contractor may use a combination of primary and Excess/Umbrella policy/policies to satisfy the limits of liability required herein. The Excess/Umbrella policy/policies must provide the same coverages/follow form as the underlying policy/policies.

### 4) **Umbrella or Excess Liability**

Umbrella or Excess Liability Insurance must be maintained with limits of not less than \$**2,000,000** per occurrence, or the full per occurrence limits of the policy, whichever is greater. The policy/policies must provide the same coverages/follow form as the underlying Commercial General Liability, Automobile Liability, Employers Liability and Completed Operations coverage required herein and expressly provide that the Excess or Umbrella policy/policies will drop down over reduced and/or exhausted aggregate limit, if any, of the underlying insurance. The Excess/Umbrella policy/policies must be primary without the right of contribution by any other insurance or self-insurance maintained by or available to the City.

The Contractor may use a combination of primary and Excess/Umbrella policies to satisfy the limits of liability required under Workers' Compensation, Employer's Liability, Commercial General Liability, and Automobile Liability.

## 5) Cyber Liability and Tech E & O Insurance

Cyber Liability and Tech E&O Insurance must be maintained with limits of not less than **\$10,000,000** for cyber incident, and coverage must include the following:

- Liability for system failure, network failure, security breaches, including loss or unauthorized access, use or disclosure of sensitive data or proprietary data, whether by Contractor or any subcontractor or cloud service provider used by Contractor;
- Costs associated with a privacy breach, including notification of affected individuals, customer support, forensics, crises management / public relations consulting, legal services of a privacy attorney, credit monitoring and identity fraud resolution services for affected individuals;
- Expenses related to regulatory compliance, government investigations, fines, fees, assessments, and penalties where insurable by law;
- Liability for technological products and services provided by or created by Contractor, including intellectual property infringement or misappropriation.
- Liability for professional services provided by Contractor;
- PCI fines, fees, penalties, and assessments;
- Costs associated with social engineering fraud loss, and cyber extortion payment and response costs;
- First and Third-Party Business Interruption Loss resulting from a network security failure or system failure;
- Costs of restoring, updating, or replacing data; and
- Liability losses connected to network security, privacy, and media liability.

The City must be named as an additional insured. A copy of the physical 'Additional Insured' endorsement must accompany the Certificate of Insurance when submitted. Certificates of Insurance and Additional Insured Endorsements reflecting applicable limits, sub-limits, self-insured retentions and deductibles must be provided upon request. The certificate must confirm the required coverages in the 'Additional Comments' section or Contractor must provide a copy of the declarations page confirming the details of the cyber insurance policy. Contractor will be responsible for all deductibles, self-insured retentions or waiting period requirements. Contractor shall provide any coverage sublimits under the policy. In the event Contractor maintains broader coverage and/or higher limits than the minimums shown above, the City of Chicago shall be entitled to the broader coverage and/or higher limits maintained by Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available. If the Cyber Liability and Tech E&O policy is written on a claims-made basis, the retroactive date should be prior to the commencement of this agreement/addendum. If the policy is written on a claims-made basis and non-renewed at any time during and up until the completion of the project or services, Contractor shall maintain coverage that

meets these requirements for a period of not less than three years from the date of completion of the project or services with a retroactive date prior to the commencement of the project or services or shall purchase an Extended Reporting Period for at least a three year period. All insurance carrier(s) must carry an A.M. Best rating of at least A-, Class VIII.

*Insurance coverages that begin with “when,” “if,” or “where,” are considered conditional, and it is the Contractor’s responsibility to obtain the applicable coverage when performing such work, service, or operation as described in the conditional coverage paragraph(s). If it is determined that conditional coverage is not initially applicable, it is the Contractor’s continuing responsibility to update the insurance coverage as needed. If at any time, the Contractor or City determines that a conditional coverage is applicable, the Contractor shall not perform the work, service, or operation in connection with the contract until evidence of all applicable insurance coverage is provided to the City.*

## 6) **Property**

Contractor is responsible for all loss or damage to City property at full replacement cost as a result of the Agreement.

Contractor is responsible for all loss or damage to personal property (including materials, equipment, tools and supplies) owned, rented or used by Contractor.

## 7) **Professional Liability (when applicable)**

When any professional consultants perform work, services, or operations in connection with this Agreement, Professional Liability Insurance covering acts, errors, or omissions must be maintained with limits of not less than \$**5,000,000** per claim. Coverage must include, but not be limited to, technology errors and omissions, and/or pollution liability if environmental site assessments are conducted, when applicable. When policies are renewed or replaced, the policy retroactive date must coincide with, or precede start of work under the Agreement. A claims-made policy which is not renewed or replaced must have an extended reporting period of two (2) years.

## 8) **Valuable Papers (when applicable)**

When any plans, designs, drawings, specifications, media, data, records, reports, and other documents are produced or used under this Agreement, Valuable Papers Insurance must be maintained in an amount to insure against any loss whatsoever and must have limits sufficient to pay for the re-creation and reconstruction of such records.

## 9) **Blanket Crime (when applicable)**

When applicable, Contractor must maintain Crime Insurance or equivalent covering all persons handling funds under this Agreement, against loss by employee dishonesty, forgery or alteration, funds transfer fraud, robbery, theft, destruction or disappearance, computer fraud, credit card forgery, and other related crime risks. The policy limit shall be written to cover losses in the amount of the maximum monies collected or received and in the possession of Contractor at any given time under this Agreement.

## **B. ADDITIONAL REQUIREMENTS**

Evidence of Insurance. Contractor must furnish the City of Chicago, Certificates of Insurance (COI) and additional insured endorsement, or other evidence of insurance, to be in force on the date of this Agreement, and renewal COIs and endorsement, or such similar evidence, if the coverages have an expiration or renewal date occurring during the term of this Agreement. The Contractor must submit evidence of insurance prior to execution of Agreement. The receipt of any COI does not constitute agreement by the City that the insurance requirements in the Agreement have been fully met or that the insurance policies indicated on the COI are in compliance with all requirements of the Agreement. The failure of the City to obtain, nor the City's receipt of, or failure to object to a non-complying insurance certificate, endorsement or other insurance evidence from Contractor, its insurance broker(s) and/or insurer(s) will not be construed as a waiver by the City of any of the required insurance provisions. Contractor must advise all insurers of the Agreement provisions regarding insurance. The City in no way warrants that the insurance required herein is sufficient to protect the Contractor for liabilities which may arise from or relate to the Agreement. The City reserves the right to obtain complete, certified copies of any required insurance policies at any time.

Failure to Maintain Insurance. Failure of the Contractor to comply with required coverage and terms and conditions outlined herein will not limit Contractor's liability or responsibility nor does it relieve Contractor of the obligation to provide insurance as specified in this Agreement. Nonfulfillment of the insurance conditions may constitute a violation of the Agreement, and the City retains the right to suspend this Agreement until proper evidence of insurance is provided, or the Agreement may be terminated.

Notice of Material Change, Cancellation or Non-Renewal. Consistent with State law, Contractor must provide for sixty (60) days prior written notice to be given to the City in the event coverage is substantially changed, canceled or non-renewed and ten (10) days prior written notice for non-payment of premium. See 215 ILCS 5/143.16 and 143.17(a). A copy of the physical endorsements must accompany the Certificate of Insurance for



General Liability, Automobile Liability and Workers Compensation in order to comply with the insurance requirements.

Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions on referenced insurance coverages must be borne by Contractor.

Waiver of Subrogation. Contractor hereby waives its rights and its insurer(s)' rights of, and agrees to require their insurers to waive their rights of, subrogation against the City under all required insurance herein for any loss arising from or relating to this Agreement. The Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether the City receives a waiver of subrogation endorsement for Contractor's insurer(s).

Contractors Insurance Primary. For any claims related to this contract, the Contractor's insurance coverage shall be primary and non-contributory. Any insurance or self-insurance maintained by the City shall be excess of the Contractor's insurance and shall not contribute with it. This also applies to any Excess or Umbrella liability policies.

Acceptability of Insurers. Insurance is to be placed with insurers authorized to conduct business in the state with a current A.M. Best rating of no less than A-, Class VIII, unless otherwise approved by the City.

No Limitation as to Contractor's Liabilities. The coverages and limits furnished by the Contractor in no way limit the Contractor's liabilities and responsibilities specified within the Agreement or by law.

Insurance not Limited by Indemnification. The required insurance to be carried is not limited by any limitations expressed in the indemnification language in this Agreement or any limitation placed on the indemnity in this Agreement given as a matter of law.

Insurance and Limits Maintained. If Contractor maintains higher limits and/or broader coverage than the minimums shown herein, the City requires and shall be entitled the higher limits and/or broader coverage maintained by Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City.

Joint Venture or Limited Liability Company. If Contractor is a joint venture or limited liability company, the insurance policies must name the joint venture or limited liability company as a named insured.

Other Insurance obtained by Contractor. If Contractor desires additional coverages, the Contractor will be responsible for the acquisition and cost.

Insurance Required of Subcontractors. Contractor shall name the Subcontractor(s) as a named insured(s) under Contractor's insurance or Contractor will require each Subcontractor(s) to provide and maintain Commercial General Liability, Commercial

Automobile Liability, Worker's Compensation, Employers Liability, and when applicable Excess/Umbrella Liability, Professional Liability, Cyber Liability, and/or Pollution Liability Insurance with coverage at least as broad as in outlined in Section A, Insurance Required. Contractor must ensure that coverage(s) is sufficient to cover any potential risks or damages arising from Subcontractor's work. Unless otherwise specified, the appropriate coverage limits for Subcontractor(s) may be determined by Contractor, but these limits must be adequate to cover all potential liabilities. Should Contractor accept coverage limits from Subcontractor(s) less than those outlined in Section A, Contractor shall be responsible for any gap in the required coverage limits in the event of a loss. Contractor shall determine if Subcontractor(s) must also provide any additional coverages. Contractor is responsible for ensuring that each Subcontractor has named the City of Chicago as an additional insured where required and provide evidence of additional insured status on an endorsement form acceptable to the City. Contractor is also responsible for ensuring that each Subcontractor has complied with the required coverage and terms and conditions outlined in Section B, Additional Requirements. When requested by the City, Contractor must provide to the City all physical copies of Certificates of Insurance and additional insured endorsements or other evidence of insurance. The City reserves the right to obtain complete, certified copies of any required insurance policies at any time. Failure of Subcontractor(s) to comply with required coverage(s) and terms and conditions outlined herein will not limit Contractor's liability or responsibility.

City's Right to Modify. Notwithstanding any provisions in the Agreement to the contrary, the City, Department of Finance, Risk Management Division maintains the right to modify, delete, alter or change these requirements.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/27/2025

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 have ADDITIONAL INSURED provisions or 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 FOUR EMBARCADERO CENTER, SUITE 1100 CALIFORNIA LICENSE NO. 0437153 SAN FRANCISCO, CA 94111	<b>CONTACT NAME:</b> <b>PHONE (A/C, No. Ext):</b> <b>E-MAIL ADDRESS:</b>	<b>FAX (A/C, No):</b>
CN102555145-Koch-CasCy-24-25	<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>
<b>INSURED</b> INFOR PUBLIC SECTOR, INC. 13560 MORRIS ROAD, SUITE 4100  ALPHARETTA, GA 30004	<b>INSURER A:</b> Old Republic Insurance Company <b>INSURER B:</b> Swiss Re Corporate Solutions Capacity Insurance <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	24147 34916

**COVERAGES****CERTIFICATE NUMBER:**

SEA-004093437-01

**REVISION NUMBER:** 1

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  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	X	X	MWZY 315812 24	12/01/2024	12/01/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 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 type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY	X	X	MWTB 315811 24	12/01/2024	12/01/2025	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 type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$	X	X	MWZU 315814 24	12/01/2024	12/01/2025	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000
A	<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	<input checked="" type="checkbox"/> Y <input type="checkbox"/> N	X	MWC 314306 24	12/01/2024	12/01/2025	<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
B	Tech E&O/Cyber			5376.11	12/01/2022	12/01/2025	Limit each claim/aggregate 10,000,000

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

RE: Specification No. 61590 and Contract P.O. No. 16761

City of Chicago is included as an additional insured on a primary and non-contributory basis with respect to the general liability, automobile liability and Tech E&O/Cyber policies but only as required by executed written contract and subject to the terms and conditions of the policies. A waiver of subrogation applies for all policies referenced above in accordance with the terms and conditions of the policies.

**CERTIFICATE HOLDER**

City of Chicago  
City Hall - Department of Procurement Services  
121 North LaSalle Street  
Room 803  
Chicago, IL 60602

**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE  
of Marsh Risk & Insurance Services

*Marsh Risk & Insurance Services*

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CITY OF CHICAGO

DEPARTMENT OF TECHNOLOGY AND INNOVATION

**MEMORANDUM**

To: Sharla Roberts  
Chief Procurement Officer  
Department of Procurement Services

From: Nick Lucius  
Commissioner  
Department of Technology and Innovation

Date: June 16, 2025

Re: Partial MBE/WBE Waiver Concurrence  
Infor Public Sector Inc.  
PO 16761 Spec 61590  
Req No: 291932

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

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

Cc: NCRB  
M. Clark/DTI  
E. Tenfelde/ DTI  
S. Huegel/DTI  
R. Jimenez/ DTI



641 Avenue of the Americas  
New York, NY 10011  
800-260-2640  
infor.com

June 16, 2025

City of Chicago  
Department of Technology & Innovation  
Attn: Mr. Nick Lucius, Chief Information Officer  
2 North LaSalle, Suite 1010  
Chicago, IL 606042

Dear Mr. Lucius,

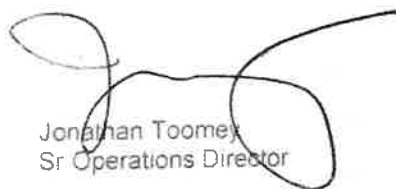
As requested by Mr. Joseph Chan, please accept this letter as a request for partial waiver for our MBE/WBE commitment for the Annual Maintenance and License component of agreement. The challenge in providing MBE/WBE commitment for this portion is due to the fact that the scope of the maintenance and license do not include a human service aspect therefore do not offer an opportunity for direct minority and women participation.

Infor Public Sector, Inc. continues to support City of Chicago's commitment to minority and women owned businesses.

As you will see in the attached, we have submitted a plan to spend an estimated \$1,432,989.25 during the revised contract period with the City of Chicago certified MBE firms: Excelsior Consulting and Arabel Alva Rosales (AAR), along with an estimated \$286,597.85 with the City of Chicago certified WBE firm: 606Digital. Based on the proposed revised contract value, this will allow us to meet our goal of 25% MBE and 5% WBE for the services portion of the agreement.

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

With Best Regards,



Jonathan Toomey  
Sr. Operations Director

cc: Sharla Roberts- CPO  
- including D1 as attachment



**FOR  
NON-CONSTRUCTION  
PROJECTS ONLY**

## **SCHEDULE C-1**

### **MBE/WBE Letter of Intent to Perform as a Subcontractor, Supplier, or Consultant**

Project Name: Infor Public Sector Application Support/Helpdesk 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 or Cook County, Illinois 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:

The nature of the services is to provide temporary staff to Infor to support multiple functions as part of the Infor Support Contract to City of Chicago.

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

The above described performance is offered for the following price of \$1,261,030.54 and described terms of payment for the duration of the support Contract with the City of Chicago. Billing terms include weekly timesheets submission and Infor pays Excelsior within 30 days or less.

### **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.

The undersigned has entered into a formal written mentor protégé agreement as a subcontractor/protégé with you as a Prime Contractor/mentor: ( ) Yes ( X ) No

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

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

06/18/2025

(Date)

Sudhashree Kota/President

(Name/Title-Please Print)

sudha@excelsiorconsulting.net; 973-447-2575

(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: Infor Public Sector Application Support/Helpdesk Specification No.: 61590

From: A Alva Rosales R Associates Ltd.  
(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 or Cook County, Illinois 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:

The nature of the services is to provide temporary staff to Infor to support multiple functions as part of the Infor Support Contract to City of Chicago.

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

The above described performance is offered for the following price of \$ 171,958.71 and described terms of payment for the duration of the contract with the City of Chicago. Billing terms include weekly timesheets submission and Infor pays AAR within 30 days or less.

#### **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.

The undersigned has entered into a formal written mentor protégé agreement as a subcontractor/protégé with you as a Prime Contractor/mentor: ( ) Yes ( X ) No

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

(Signature of President/Owner/CEO or Authorized Agent of MBE/WBE)

(Date)

Aabel Alva Rosales  
(Name/Title-Please Print)

(Email & Phone Number)

773 865 7313 Aabel Alva Rosales, President



## SCHEDULE C-1

### MBE/WBE Letter of Intent to Perform as a Subcontractor, Supplier, or Consultant

**FOR  
NON-CONSTRUCTION  
PROJECTS ONLY**

Project Name: Infor Public Sector Application Support/Helpdesk Specification No.: 61590

From: 606 Digital

(Name of MBE/WBE Firm)

To: Infor Public Sector, Inc

(Name of Prime Contractor)

and the City of Chicago.

The MBE or WBE status of the undersigned is confirmed by the attached City of Chicago or Cook County, Illinois 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:

The nature of the services is to provide temporary staff to Infor to support multiple functions as part of the Infor Support Contract to City of Chicago.

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

The above described performance is offered for the following price of \$286,597.25 and described terms of payment for the duration of the contract with the City of Chicago. Billing terms include weekly timesheets submission and Infor pays 606 Digital within 30 days or less.

#### 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.

The undersigned has entered into a formal written mentor protégé agreement as a subcontractor/protégé with you as a Prime Contractor/mentor: ( ) Yes ( X ) No

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

(Signature of President/Owner/CEO or Authorized Agent of MBE/WBE)

(Date)

(Name/Title-Please Print)

(Email & Phone Number)





**SCHEDULE D-1**  
**Compliance Plan Regarding MBE/WBE Utilization**  
**Affidavit of Prime Contractor**

**FOR  
NON-CONSTRUCTION  
PROJECTS ONLY**

**MUST BE SUBMITTED WITH THE BID FAILURE TO SUBMIT THE SCHEDULE D-1 WILL CAUSE THE  
BID TO BE REJECTED DUPLICATE AS NEEDED.**

Project Name City of Chicago - Infor Public Sector, Inc. Application Support and Help Desk Support Services

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 MBE/WBE goals of this contract

All MBE/WBE firms included in this plan have been certified as such by the City of Chicago and/or Cook County, Illinois (Letters of Certification Attached).

**I. Direct Participation of MBE/WBE Firms:**

**NOTE** The bidder/proposer shall, in determining the manner of MBE/WBE participation, first consider involvement with MBE/WBE 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 joint venture and one or more joint venture partners are certified MBEs or WBEs, attach copies of Letters of Certification, Schedule B form and a copy of Joint Venture Agreement clearly describing the role of each MBE/WBE firm(s) and its ownership interest in the joint venture.

B. Complete this section for each MBE/WBE Subcontractor/Supplier/Consultant participating on this contract:

1. Name of MBE/WBE A Alva Rosales R Associates Ltd.  
Address 1900 S Clark St, Suite 102, Chicago IL 60616  
Contact Person Arabel Alva Rosales  
Phone Number 773-733-7140  
Dollar Value of Participation \$ 171,958.71  
Percentage of Participation % 3%  
Mentor Protégé Agreement (attach executed copy) ( ) Yes (X) No Add'l Percentage Claimed '        %  
Total Participation % 3%
2. Name of MBE/WBE Excelsior Consulting Services, Inc  
Address 1236 Connamara Ct, Westmont, IL 60559  
Contact Person Sudhashree Kota

\* The Prime Contractor may claim an additional 0.333 percent participation credit (up to a maximum of five (5) percent) for every one (1) percent of the value of the contract performed by the MBE/WBE protégé firm

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

Phone Number: 973-447-2575

Dollar Value of Participation \$ 1,261,030.54

Percentage of Participation % 22%

Mentor Protégé Agreement (attach executed copy): ( ) Yes (X) No Add'l Percentage Claimed \_\_\_\_%

Total Participation % 22%

3. Name of MBE/WBE: 606 Digital

Address: 111 W Jackson, Suite 1700, Chicago, IL 60604

Contact Person: Jessica Plopper

Phone Number: 312-545-3413

Dollar Value of Participation \$ 286,597.85

Percentage of Participation % 5%

Mentor Protégé Agreement (attach executed copy): ( ) Yes (X) No Add'l Percentage Claimed \_\_\_\_%

Total Participation % 5%

4. Name of MBE/WBE: N/A

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

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

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

Dollar Value of Participation \$ \_\_\_\_\_

Percentage of Participation % \_\_\_\_\_

Mentor Protégé Agreement (attach executed copy): ( ) Yes ( ) No Add'l Percentage Claimed: \_\_\_\_%

Total Participation % \_\_\_\_\_

5. Attach Additional Sheets as Needed

**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: N/A

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

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

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

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

Dollar Value of Participation \$ \_\_\_\_\_

Percentage of Participation % \_\_\_\_\_

Mentor Protégé Agreement (attach executed copy): ( ) Yes ( ) No Add'l Percentage Claimed: \_\_\_\_%

**Total Participation %** \_\_\_\_\_

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

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

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

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

Dollar Value of Participation \$ \_\_\_\_\_

Percentage of Participation % \_\_\_\_\_

Mentor Protégé Agreement (attach executed copy): ( ) Yes ( ) No Add'l Percentage Claimed: \_\_\_\_%

**Total Participation %** \_\_\_\_\_

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

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

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

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

Dollar Value of Participation \$ \_\_\_\_\_

Percentage of Participation % \_\_\_\_\_

Mentor Protégé Agreement (attach executed copy): ( ) Yes ( ) No Add'l Percentage Claimed: \_\_\_\_%

**Total Participation %** \_\_\_\_\_

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

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

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

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

Dollar Value of Participation \$ \_\_\_\_\_

Percentage of Participation % \_\_\_\_\_

Mentor Protégé Agreement (attach executed copy): ( ) Yes ( ) No Add'l Percentage Claimed: \_\_\_\_%

**Total Participation %** \_\_\_\_\_

5. Attach Additional Sheets as Needed

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

## III. Summary of MBE/WBE Proposal

## A. MBE Proposal (Direct &amp; Indirect)

1. MBE Direct Participation

MBE Firm Name	Dollar Amount Participation (\$)	Percent Amount Participation (%)
A Alva Rosales R Associates Ltd.	\$171,958.71	3%
Excelsior Consulting Services, Inc.	\$1,261,030.54	22%
<b>Total Direct MBE Participation</b>		

2. MBE Indirect Participation

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

## B. WBE Proposal (Direct &amp; Indirect)

1. WBE Direct Participation

WBE Firm Name	Dollar Amount Participation (\$)	Percent Amount Participation (%)
606 Digital	\$286,597.85	5%
<b>Total Direct WBE Participation</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.

Jimi Stricklin

614-403-9746

(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: Kansas

(Signature)

County of: Sedgwick

Jonathan Toomey - SR OPERATIONS DIRECTOR  
(Name/Title of Affiant – Print or Type)

June 19, 2025  
(Date)

On this 19<sup>th</sup> day of June, 2025, the above signed officer Jonathan Toomey  
(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.

Kim Cole  
(Notary Public Signature)

SEAL:

Commission Expires: 11/25/2025

