

Internal M/WBE Waiver Request Form

Date: Department:

Contact Name & Phone:

Contract Name and Number (if applicable):

A waiver of the M/WBE participation requirement may be requested by the **Originating Department** at least 5 business days **prior** to advertisement or solicitation. In detail below, please explain your reason for requesting a waiver (attach RFP & supporting documentation as necessary).

Final approval of the request will be made by the City Manager's Office.

This change order is to add the Document Capture (Ephesoft) license for the full 5-year period to the Infor software subscription. This Ephesoft document capture product was not available for multi-tenant users when our contract was routed in September and so this change order was anticipated. The product is required for scanning AP invoices, HR documents, Journal Entries and Contracts into the document-imaging module (IDM) of the system.

This contract is going before council on the March 17, 2020 agenda.

The original subscription for a 5 year period of FY20- FY24 is \$4,948,839. This will add an additional \$298,048.45 to the 5 year subscription. This represents 6% of the contract value. The new total value of the contract is \$5,246,887.45

*****PRIOR APPROVED WAIVER*****

The Finance, Human Resource and Information Technology Department desire to alter the remaining two years of our five year contract and extend our commitment to the Infor ERP solution. The Infor Lawson solution is essential in supporting the city's enterprise applications which include financial, human capital management, and procurement systems. It is considered the system of record for all City administration functions. The new subscription agreement will have a five year commitment term with annual subscription fees due each year. Infor has offered this agreement with a 2% escalation in each annual fee. This is 3% below the industry norm. This renewal and service agreement includes additional product and all data migrations to the new Infor version 11 release which is entirely rewritten from the original Lawson applications. Securing this commitment for several years allows us to plan out our anticipated expenses and maintain our capital leasing fund at the appropriate funding levels.

We are happy with the current product, but always seeking further improvement. By changing our licensing model, Infor was able to put together a bundled package to meet our objectives. This package includes the following new products:

- Coleman Artificial Intelligence – built in machine learning and voice recognition skills
- Birst Reporting Tools- Analytic designer tools and pre-delivered dashboards
- Tracker E-verify and I-9 solution services.
- User Adoption Platform- Training tools for the Learning Management System
- Infor Document Management – Built in Document management to store supporting documentation on the transaction

We recognize that competitive ERP solutions exist; however, continuing with the existing solution is the most reasonable and efficient way to meet the objectives of the organization. The Infor software, while not perfect, is continually evolving, and offers the breadth and depth of functionality we require to run the business of the City. Implementing a new solution would create a great deal of resource turbulence to the organization and is frankly cost prohibitive. The original purchase of Lawson was a six million dollar investment for software and implementation and that was almost twenty years ago. It would far exceed that for the same quality solution today.

Christine A. Hofer, Deputy
CIO

Digitally signed by Christine A. Hofer,
Deputy CIO
Date: 2020.02.25 14:16:57 -05'00'

This section is for M/WBE Office use only

Contact Name & Phone Number: 2019-5279 Infor CloudSuite Subscription , Change order 1

☒ The M/WBE Office supports the waiver request. Please submit any comments below.

1. The extraordinary and necessary requirements of the contract render application of the Program Elements infeasible or impractical. **Please explain in detail. (Attach supporting documentation as necessary)**

The request to add license services is supported by the M/WBE Office due to the City's current use of Info Lawson as its main ERP Solution Software. To change vendors would be costly and heavy impact City operations.

2. The nature of the goods or services being procured are excluded from the scope of this Program Plan.

Please check one of the exclusions below: (Attach supporting documentation as necessary)

- ☐ Contracts that are subject to the U.S. Department of Transportation Disadvantaged Business Enterprise Program;
- ☒ Sole Source: the required supplies or services are available from one responsible source
- ☐ Contracts for electricity or water and sewage services from a municipal utility district or governmental agency;
- ☐ Emergency contracts for goods or supplies;
- ☐ Contracts for the City's lease or purchase of real property where City is lessee or purchaser; and

3. Sufficient qualified M/WBEs providing the goods or services required by the contract are unavailable in the Relevant Market area of the project despite every reasonable attempt to locate them. **Please explain in detail the reason for the request: (Attach RFP & supporting documentation as necessary)**

☐ The M/WBE Office does not support the waiver request. Please explain in detail the reason for not supporting the request: (Attach supporting documentation as necessary)

Allison Staton Digitally signed by Allison Staton
Date: 2020.02.28 17:57:51 -05'00'

This section is for CMO Office use only

Contact Name: Kim Sowell  Date: 3/2/2020

☒ The CMO Office approves the waiver request

☐ The CMO Office does not approve the waiver request.