



Procurement Review Comprehensive Checklist
 Procurement Services Division
 This form must accompany all Purchase Order Requisitions

SECTION 1: DESCRIPTION			
<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#: 23-3107	RFP, BID, QUOTE OR RENEWAL #: P-527637-US0AB	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$203,506.51
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 10/17/2023	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$203,506.51
	CURRENT TERM TOTAL COST: \$203,506.51	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Infor (US) Inc.	VENDOR #: 13553	DEPT: IT	DEPT CONTACT NAME: Alma Montero
VENDOR CONTACT: Shawwna Wagner	VENDOR CONTACT PHONE: 612-770-4443	DEPT CONTACT PHONE #: 630-407-5015	DEPT CONTACT EMAIL: Alma.Montero@dupageco.org
VENDOR CONTACT EMAIL: Shawwna.Wagner@infor.com	VENDOR WEBSITE:	DEPT REQ #:	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Annual maintenance and support services for Infor ERP software for a total contract amount of \$203,506.51, exempt from bidding per DuPage County Purchasing Ordinance, Article 4-102(5) - Sole Source - this is proprietary software that must be maintained by the vendor, Infor (US) Inc.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished Maintenance is required to ensure our ERP system functions properly.			

SECTION 2: DECISION MEMO REQUIREMENTS	
DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required. SOLE SOURCE PER DUPAGE ORDINANCE, SECTION 2-350 (MUST FILL OUT SECTION 4)
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

SECTION 3: DECISION MEMO	
STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact.
SOURCE SELECTION	Describe method used to select source.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action).

SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

JUSTIFICATION	Select an item from the following dropdown menu to justify why this is a sole source procurement. SOFTWARE MANUFACTURER AND SOLE MAINTENANCE/UPDATE PROVIDER
NECESSITY AND UNIQUE FEATURES	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific. This is proprietary software that must be maintained by the vendor.
MARKET TESTING	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not. This is proprietary software that must be maintained by the vendor.
AVAILABILITY	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted. This is proprietary software that must be maintained by the vendor.

SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Infor (US) Inc.	Vendor#: 13553	Dept: IT	Division:
Attn: Shawwna Wagner	Email: Shawwna.Wagner@infor.com	Attn: Sarah Godzicki	Email: Sarah.Godzicki@dupageco.org
Address: 13560 Morris Road, Suite 4100	City: Alpharetta	Address: 421 N. County Farm Road	City: Wheaton
State: GA	Zip: 30004	State: IL	Zip: 60187
Phone: 612-770-4443	Fax:	Phone: 630-407-5037	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Infor (US) Inc.	Vendor#: 13553	Dept: IT	Division:
Attn:	Email:	Attn: Alma Montero	Email: Alma.Montero@dupageco.org
Address: NW 7418, PO Box 1450	City: Minneapolis	Address: 421 N. County Farm Road	City: Wheaton
State: MN	Zip: 55485-7418	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5015	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): 11/13/2023	Contract End Date (PO25): 11/12/2024
Contract Administrator (PO25): Alma Montero			

Purchase Requisition Line Details

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		Annual Software Maintenance and Support for Infor ERP Software	FY23	1000	1110	53807		203,506.51	203,506.51
<i>FY is required, assure the correct FY is selected.</i>										Requisition Total	\$ 203,506.51

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Please make First Invoice Allowed Date 09/01/2022. Please send PO to Sarah Godzicki and Alma Montero and copy both when emailing PO to vendor.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached: W-9 Vendor Ethics Disclosure Statement