CITY OF CHICAGO
DEPARTMENT OF PURCHASES,
CONTRACTS AND SUPPLIES
ROOM 403, CITY HALL, 121 N. LaSALLE ST.

JNCP Form Rev 9/97

# JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT

COMPLETE THIS SECTION IF NEW CONTRACT(S)
For contract(s) in this request, answer applicable questions in each of the 4 major subject areas below in accordance with the Instructions for Preparation of Non-Competitive Procurement Form on the reverse side.

Request that negotiations be conducted only with **Siemens** for the product and/or services described herein.
(Name of Person or Firm)

This is a request for:___ (One-Time Contract Per Requisition #____, copy attached) or _X_ Term Agreement
or ____ Delegate Agency (Check one). If Delegate Agency, this request is for "blanket approval" of all contracts within the _____(Attach List) Pre-Assigned Specification No._____
(Program Name) Pre-Assigned Contract No._____

COMPLETE THIS SECTION IF AMENDMENT OR MODIFICATION TO CONTRACT
Describe in detail the change in terms of dollars, time period, scope of services, etc., is relationship to the original contract and the specific reasons for the change. Indicate both the original and the adjusted contract amount and/or expiration date with this change, as applicable. Attach copy of all supporting documents. Request approval for a contract amendment or modification to the following:

Contract #: _____ Company, or Agency Name: _____

Specification #: _____ Contract or Program Description: _____
Mod #: _____ (Attach List, if multiple)

| John Teele | 686-4604 | John Teele | Aviation | 19May2004 |
|---|---|---|---|---|
| Originator Name | Telephone | Signature | Department | Date |

Indicate SEE ATTACHED in each box below if additional space needed:

(X ) PROCUREMENT HISTORY: Siemens is the manufacturer, designer, supplier, and installer of the equipment known as the Supervisory Monitoring System (SMS). The SMS is to be serviced, maintained, repaired, and upgraded throughout the terminals, H & R Plant and remote buildings. They are presently performing under a Sole Source Contract with the Department of Aviation which expires May 31, 2004. The Department of Aviation would like to renew the contract for maintenance service and repair of the system. The SMS at O'Hare consists of hardware and software designed, supplied, installed, commissioned, and warranted and serviced by Siemens. The primary hardware components of the SMS are either manufactured by or designed by and manufactured specifically for Siemens. The software that operates the system on all levels (DSC, DNC, CNP, and interfaces) were designed and written by Siemens on a proprietary basis. This is an entirely proprietary system, and only Siemens may service the system, therefore no attempt was made to competitively bid this requirement. As long as O'Hare has Siemens building controls, DOA will likely have Siemens as a Sole Source. Future competitive bidding will most likely not be possible due to the significant investment in Siemens building controls that would have to be replaced to use another system (proprietary or not).

( X ) ESTIMATED COST: The estimated cost for the maintenance and upgrade of the supervisory monitoring system is estimated at $ 10,624,002.00 for five years. 1st year $1,997,770.00, 2nd year $2,055,681.00, 3rd year $2,126,291.00, 4th year $2,189,343.00 and 5th year $2,254,917.00.

( X ) SCHEDULE REQUIREMENTS: The contract will be for five years.

( X ) EXCLUSIVE OR UNIQUE CAPABILITY: This is an entirely proprietary system, and only Siemens may service the system. As long as O'Hare Airport has Siemens controls, DOA will likely have Siemens as sole source. Future competitive bidding will most likely not be possible due to the significant investment in Siemens building controls that would have to be replaced to use another system (proprietary or not). As D.O.A. proceeds with new and existing project in respects to the Building Management System we will require them to be open protocol. When we require to replace current parts under the existing or future contract D.O.A. will direct the contractor to exchange them with open protocol components if applicable.

(X ) OTHER: Siemens purchased Landis & Staefa in 2001. Siemens plans to meet the MBE/WBE requirements under the contract as follows: MBE participation of 16.9% by indirect participation. WBE participation of 4.5% by direct participation.

APPROVED BY: _____ 6-11-04 _____ _____
DEPARTMENT HEAD OR DESIGNEE — DATE — BOARD CHAIRPERSON — DATE

**DEPARTMENT OF AVIATION**

# MEMORANDUM

TO: John A. Roberson, Commissioner DATE: May 28, 2004

ATTN: **Patrick Harney, First Deputy Commissioner**

FROM: John Teele, Deputy Commissioner / Facilities

**SUBJECT: REQUEST FOR NEW SOLE SOURCE CONTRACT**
**OLD SPECIFICATION NUMBER: B89381704**
**MAINTENANCE OF SYSTEM 600**
**CURRENT EXPIRATION: MAY 31, 2004**
**CURRENT VENDOR: SIEMENS**

**JUSTIFICATION:** The current contract for the Supervisory Monitoring System (SMS) will expire on May 31, 2004. Siemens holds the contract and has done an exceptional job maintaining the monitors for all fire alarms, life safety alarms, and electrical and mechanical building systems throughout O'Hare International Airport.

Siemens manufactured, designed, supplied, installed, commissioned and warranted all of the existing equipment. Siemens originally was awarded the design and installation contract via the RFQ/RFP process in 1988. They were among three firms which submitted proposals. At that time they were know as Landis & Staefa. They have maintained the system on a sole source contract basis since then. The primary hardware components of the SMS are either manufactured by or designed by and manufactured specifically for Siemens. The building contracts and software used are proprietary to Siemens and they do not license any third party vendors to use their equipment.

The operating system cannot be maintained by anyone other than Siemens due to its proprietary nature. However, when components such as air handling units are added to the system, any manufacturer's operating controls can be used, so long as there is a "open protocol communication" installed which translates the other manufacturers language to Siemens language and vice versa. Currently terminal 3 A.H.U. is open protocol and terminal 2 A.H.U. will be open protocol by spring of 2005. With current C.I.P. request such as project #1000001168, replace air handling units Rotunda / H & K/ E&F, Facilities is requesting open protocol operating systems. Until such time that we have a percentage of open protocol system's it would be virtually impossible to competitively bid this contract. It is technologically impossible at this time to have a "open protocol system" between the Siemens operating system and another manufacturer's operating system that would allow other manufacturer's to maintain the supervisory monitoring system. With respect to fostering competition, it would require installing a completely new system at a cost that would exceed $25 million dollars. However, we will continue to inquire in the marketplace in an attempt to identify a compatible open protocol system.

| | |
|---|---|
| **Type of Procurement:** | **Sole Source** |
| **Contract Duration:** | **Five Years** |
| **Estimated Annual Cost:** | **1st year - $1,997,770.00**<br>**2nd year - $2,055,681.00**<br>**3rd year - $2,126,291.00**<br>**4th year - $2,189,343.00**<br>**5th year - $2,254,917.00** |
| **Funding:** | **740-85-4035-0162-0162** |

| | | |
|---|---|---|
| **User Contact:** | **Paul Brown** | **Phone: 773-686-7310** |
| **User Deputy:** | **John Teele** | **Phone: 773-686-4604** |

**DEPARTMENT OF AVIATION**

# MEMORANDUM

**DATE:** June 1, 2004

**TO:** Eric J. Griggs
Chief Procurement Officer

**ATTENTION:** Kerwen Whatley
Deputy Procurement Officer

**FROM:** John A. Roberson
Commissioner of Aviation

**SUBJECT:** REQUEST APPROVAL FOR NON-COMPETITIVE PROCUREMENT
VENDOR: SIEMENS
SUPPORTED MAINTENANCE OF SMS 600 BUILDING MANAGEMENT SYSTEM AT O'HARE INTERNATIONAL AIRPORT
EXPIRING SPECIFICATION NUMBER: B89381704
ORIGINAL EXPIRATION: 5/31/02
*CURRENT EXPIRATION DATE: 5/31/04
FMPS P.O. NUMBER: T25779

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The Department of Aviation O'Hare Facilities Section requests approval for a non-competitive procurement of support and maintenance services of the SMS 600 Building Management System at O'Hare International Airport.

The current contract for the Supervisory Monitoring System (SMS) expired on May 31, 2004. Siemens holds the contract and has done an exceptional job maintaining the monitors for all fire alarms, life safety alarms, and electrical and mechanical building systems throughout O'Hare International Airport.

Siemens manufactured, designed, supplied, installed, commissioned and warranted all of the existing equipment. Siemens originally was awarded the design and installation contract via the RFQ/RFP process in 1988. They were among three firms which submitted proposals. At that time they were known as Landis & Staefa. They have maintained the system on a sole source contract basis since then. The primary hardware components of the SMS are either manufactured by or designed by and manufactured specifically for Siemens and they do not license any third party vendors to use their equipment.

Vendor: Siemens

The operating system cannot be maintained by anyone other than Siemens due to its proprietary nature. However, when components such as air handling units are added to the system, any manufacturer's operating controls can be used, so long as there is a "open protocol communication" installed which translates the other manufacturers language to Siemens language and vice versa. Currently Terminal 3 A.H.U. is open protocol and Terminal 2 A.H.U. will be open protocol by spring of 2005. With current C.I.P. request such as project #1000001168, replace air handling units Rotunda/H&K/E&F, Facilities is requesting open protocol operating systems. Until such time that we have a greater percentage of open protocol systems it would be virtually impossible to competitively bid this contract. It is technologically impossible at this time to have a "open protocol system" between the Siemens operating system and another manufacturer's operating system that would allow other manufacturer's to maintain the supervisory monitoring system. With respect to fostering competition, it would require installing a completely new system at a cost that would exceed $25 million dollars. However, we will continue to inquire in the marketplace in an attempt to identify a compatible open protocol system.

| | | |
|---|---|---|
| Type of Procurement: | Non-Competitive | |
| Contract Duration: | Five Years with no extension options | |
| Estimated Annual cost: | 1st year - $1,997,770.00<br>2nd year - $2,055,681.00<br>3rd year - $2,126,291.00<br>4th year - $2,189,343.00<br>5th year - $2,254,917.00 | |
| Funding: | 740 85 4035 0162 0162 | |
| User Contact: | Paul Brown | Phone: 773/686-7310 |
| User Deputy | John Teele | Phone: 773/686-4604 |

# City of Chicago
# Department of Aviation
# O'Hare International Airport

## Preventive Maintenance, Training and Software Support Services for the Supervisory Monitoring System

## Recommendation for Sole Source Renewal

SIEMENS

Submitted by

Siemens Building Technologies
PO Box 66510
O'Hare International Airport
Chicago IL 60666

Robert McCabe
773/686-8025

March 30, 2004

Mr. Robert McCabe
Siemens Building Tech.
PO Box 66510
O'Hare Intl Airport
Chicago IL 60666

Mr. Paul Brown
City of Chicago
Department of Aviation
AMF O'Hare International Airport
PO Box 66142
Chicago IL 60666

March 30, 2004

Re: Contract between City of Chicago DOA and Siemens Building Technology: *"Preventive Maintenance, Training, and Software Support Services for the Supervisory Monitoring System 600 Agreement"*

Dear Mr. Brown:

The SMS at O'Hare International Airport, one of the largest of its kind in the country, has been serviced by Siemens Building Technologies since 1991 (since 1985 in T1) under the above contract. Per your request, we have provided the attached information for your use in the Non-competitive Procurement Process:

- Cost Proposal
- Open Control Systems Discussion
- Scope of Service / List of Maintained Equipment
- Key Personnel

Renewing this contract utilizing the non-competitive process will provide the following benefits to the City of Chicago and the Department of Aviation:

- Maximum system reliability and uptime
- Reduced cost of operation through optimal system performance
- Lowest cost material and labor provided by manufacturer
- Reduced contracting cost
- Seamless contract transition

Please don't hesitate to call me with any questions regarding this contract.

Sincerely,
Siemens Building Technologies

Robert McCabe
Account Executive

# Index

## Cost Proposal: Year 1

*Siemens will meet or exceed all City of Chicago MBE/WBE goals*

| | Hourly Rate* | Estimated Hours | Estimated Compensation | |
|---|---|---|---|---|
| Labor | | | Monthly | Annual |
| **Supervisor** | | | | |
| Regular | $95/hour | 1940 | $15,358 | $184,300 |
| Overtime | $142.50/hour | | | |
| **Specialist Labor** | | | | |
| Regular | $80/hour | 6500 | $43,333 | $520,000 |
| Overtime | $120/hour | | | |
| **Software Engineer Labor** | | | | |
| Regular | $85/hour | 1960 | $13,883 | $166,600 |
| Overtime | $127.50/hour | | | |
| **Electrician**** | | | | |
| Regular | $95/hour | 1200 | $9,500 | $114,000 |
| Overtime | $120/hour | | | |
| **Mechanical Labor***** | | | | |
| Regular | $80/hour | 1200 | $8,000 | $96,000 |
| Overtime | $120/hour | | | |
| **High T Water Generator Engineer** | | | | |
| Regular | $149/hour | 480 | $5,960 | $71,520 |
| Overtime | $223/hour | | | |
| **Fire System Specialists****** | | | | |
| Regular | $80/hour | 3000 | $20,000 | $240,000 |
| Overtime | $120/hour | | | |
| | | | | |
| Total Labor | | | **$116,835** | **$1,402,020** |
| Miscellaneous Budgets | | | | |
| **Software Support** | | | $3,812 | $45,756 |
| **Non-scheduled Service** | | | $25,000 | $300,000 |
| **Parts**<br>**Siemens (List less 50% )**<br>**Outside Vendor(cost + 15%)** | **See catalogs provided** | | $16,667 | $200,000 |
| **Training Budget** | | | $4,167 | $50,000 |
| Total Miscellaneous | | | **$49,646** | **$595,756** |
| | | | Monthly | Annual |
| Total | | | **$166,481** | **$1,997,770** |

* Labor Rates have not increased since 1995

** Includes service of OCC UPS

*** Includes Liebert service

**** New NFPA code requires certified technician for all inspections

## Cost Proposal: Year 2

*Siemens will meet or exceed all City of Chicago MBE/WBE goals*

| | Hourly Rate* | Estimated Hours | Estimated Compensation | |
|---|---|---|---|---|
| Labor | | | Monthly | Annual |
| **Supervisor** | | | | |
| Regular | $99/hour | 1940 | $15,973 | $191,672 |
| Overtime | $148/hour | | | |
| **Specialist Labor** | | | | |
| Regular | $83/hour | 6600* | $45,760 | $540,800 |
| Overtime | $125/hour | | | |
| **Software Engineer Labor** | | | | |
| Regular | $88/hour | 1960 | $14,439 | $173,264 |
| Overtime | $133/hour | | | |
| **Electrician** | | | | |
| Regular | $99/hour | 1200 | $9,880 | $118,560 |
| Overtime | $125/hour | | | |
| **Mechanical Labor** | | | | |
| Regular | $83/hour | 1220* | $8,459 | $101,504 |
| Overtime | $125/hour | | | |
| **High T Water Generator Engineer** | | | | |
| Regular | $155/hour | 480 | $6,198 | $74,381 |
| Overtime | $232/hour | | | |
| **Fire System Specialists** | | | | |
| Regular | $83/hour | 3000 | $20,800 | $249,600 |
| Overtime | $125/hour | | | |
| | | | | |
| Total Labor | | | **$121,508** | **$1,458,101** |
| Miscellaneous Budgets | | | | |
| **Software Support** | | | $3,965 | $47,580 |
| **Non-scheduled Service** | | | $25,000 | $300,000 |
| **Parts**<br>**Siemens (List less 50% )**<br>**Outside Vendor(cost + 15%)** | **See catalogs provided** | | $16,667 | $200,000 |
| **Training Budget** | | | $4,167 | $50,000 |
| Total Miscellaneous | | | **$49,798** | **$597,580** |
| | | | Monthly | Annual |
| Total | | | **$171,307** | **$2,055,681** |

*Hours added for service of out-of-warranty air handler controls in Terminal 3

## Cost Proposal: Year 3

*Siemens will meet or exceed all City of Chicago MBE/WBE goals*

| | Hourly Rate* | Estimated Hours | Estimated Compensation | |
|---|---|---|---|---|
| Labor | | | Monthly | Annual |
| **Supervisor** | | | | |
| Regular | $103/hour | 1940 | $16,612 | $199,339 |
| Overtime | $154/hour | | | |
| **Specialist Labor** | | | | |
| Regular | $87/hour | 6700* | $48,311 | $579,938 |
| Overtime | $130/hour | | | |
| **Software Engineer Labor** | | | | |
| Regular | $92/hour | 1960 | $15,016 | $180,195 |
| Overtime | $138/hour | | | |
| **Electrician** | | | | |
| Regular | $103/hour | 1200 | $10,275 | $123,302 |
| Overtime | $130/hour | | | |
| **Mechanical Labor** | | | | |
| Regular | $87/hour | 1240* | $8,941 | $107,295 |
| Overtime | $130/hour | | | |
| **High T Water Generator Engineer** | | | | |
| Regular | $161/hour | 480 | $6,446 | $77,356 |
| Overtime | $241/hour | | | |
| **Fire System Specialists****** | | | | |
| Regular | $87/hour | 3000 | $21,632 | $259,584 |
| Overtime | $130/hour | | | |
| | | | | |
| Total Labor | | | **$127,234** | **$1,526,808** |
| Miscellaneous Budgets | | | | |
| **Software Support** | | | $4,124 | $49,483 |
| **Non-scheduled Service** | | | $25,000 | $300,000 |
| **Parts**<br>**Siemens (List less 50% )**<br>**Outside Vendor(cost + 15%)** | **See catalogs provided** | | $16,667 | $200,000 |
| **Training Budget** | | | $4,167 | $50,000 |
| Total Miscellaneous | | | **$49,957** | **$599,483** |
| | | | Monthly | Annual |
| Total | | | **$177,191** | **$2,126,291** |

*Hours added for service of out-of-warranty air handler controls in Terminal 2

## Cost Proposal: Year 4

*Siemens will meet or exceed all City of Chicago MBE/WBE goals*

| | Hourly Rate* | Estimated Hours | Estimated Compensation | |
|---|---|---|---|---|
| Labor | | | Monthly | Annual |
| **Supervisor** | | | | |
| Regular | $107/hour | 1940 | $17,276 | $207,312 |
| Overtime | $160/hour | | | |
| **Specialist Labor** | | | | |
| Regular | $90/hour | 6700 | $50,244 | $602,927 |
| Overtime | $135/hour | | | |
| **Software Engineer Labor** | | | | |
| Regular | $96/hour | 1960 | $15,617 | $187,402 |
| Overtime | $143/hour | | | |
| **Electrician** | | | | |
| Regular | $107/hour | 1200 | $10,686 | $128,234 |
| Overtime | $135/hour | | | |
| **Mechanical Labor** | | | | |
| Regular | $90/hour | 1240 | $9,299 | $111,587 |
| Overtime | $135/hour | | | |
| **High T Water Generator Engineer** | | | | |
| Regular | $168/hour | 480 | $6,704 | $80,450 |
| Overtime | $251/hour | | | |
| **Fire System Specialists** | | | | |
| Regular | $90/hour | 3000 | $22,497 | $269,967 |
| Overtime | $135/hour | | | |
| | | | | |
| Total Labor | | | **$132,323** | **$1,587,881** |
| Miscellaneous Budgets | | | | |
| **Software Support** | | | $3,812 | $45,738 |
| **Non-scheduled Service** | | | $25,000 | $300,000 |
| **Parts**<br>**Siemens (List less 50% )**<br>**Outside Vendor(cost + 15%)** | **See catalogs provided** | | $16,667 | $200,000 |
| **Training Budget** | | | $4,167 | $50,000 |
| Total Miscellaneous | | | **$50,122** | **$601,463** |
| | | | Monthly | Annual |
| Total | | | **$182,445** | **$2,189,343** |

## Cost Proposal: Year 5

*Siemens will meet or exceed all City of Chicago MBE/WBE goals*

| | Hourly Rate* | Estimated Hours | Estimated Compensation | |
|---|---|---|---|---|
| Labor | | | Monthly | Annual |
| **Supervisor** | | | | |
| Regular | $111/hour | 1940 | $17,967 | $215,605 |
| Overtime | $167/hour | | | |
| **Specialist Labor** | | | | |
| Regular | $94/hour | 6700 | $52,254 | $627,044 |
| Overtime | $140/hour | | | |
| **Software Engineer Labor** | | | | |
| Regular | $99/hour | 1960 | $16,242 | $194,848 |
| Overtime | $149/hour | | | |
| **Electrician** | | | | |
| Regular | $111/hour | 1200 | $11,114 | $133,364 |
| Overtime | $140/hour | | | |
| **Mechanical Labor** | | | | |
| Regular | $94/hour | 1240 | $9,671 | $116,050 |
| Overtime | $140/hour | | | |
| **High T Water Generator Engineer** | | | | |
| Regular | $174/hour | 480 | $6,972 | $83,668 |
| Overtime | $261/hour | | | |
| **Fire System Specialists** | | | | |
| Regular | $94/hour | 3000 | $23,397 | $280,766 |
| Overtime | $140/hour | | | |
| | | | | |
| Total Labor | | | **$137,616** | **$1,651,396** |
| Miscellaneous Budgets | | | | |
| | | | | |
| **Software Support** | | | $4,460 | $53,521 |
| **Non-scheduled Service** | | | $25,000 | $300,000 |
| **Parts**<br>**Siemens (List less 50% )**<br>**Outside Vendor(cost + 15%)** | **See catalogs provided** | | $16,667 | $200,000 |
| **Training Budget** | | | $4,167 | $50,000 |
| Total Miscellaneous | | | **$50,293** | **$603,521** |
| | | | Monthly | Annual |
| Total | | | **$187,910** | **$2,254,917** |

## Open Control Systems

Many of the Requests for Proposal (RFPs) for building infrastructure technology systems (building management / HVAC controls, life safety, access control) recently issued by the City of Chicago Department of Procurement and others are based upon the desire or requirement that these systems be "Open".

Open systems are usually thought to be non-proprietary, non-custom and readily available from multiple sources and channels, and, most importantly, are those that integrate seamlessly to existing or "legacy" systems. The success of this seamless integration is contingent upon the ability of the systems' languages, or protocols, to communicate with one another.

Protocols typically considered as Open include LonTalk, Modbus, SNMP (Simple Network Management Protocol), OPC (Object Linking and Embedding for Process Control) and DDE (Dynamic Data Exchange). It should be noted that these Open protocols are themselves trademarked and owned by independent entities, and require associated process devices to be compliant with the protocol or system as defined within that particular "Open" standard – a proprietary requirement in of itself. As such, all systems, including those known as Open, have proprietary hardware and/or software component requirements.

### O'Hare SMS

The Siemens Supervisory Monitoring System (SMS) at O'Hare, installed in stages since 1985, predated this Open protocol design philosophy, and therefore was not inherently Open by design or installation. However, as the Open philosophy became prevalent in the industry, Siemens engineered the interoperability of the existing system to the open standards via device drivers, protocol translators, and gateways. Utilizing these devices and methods, the Siemens SMS at O'Hare has become increasingly Open. In its current configuration, the capability of this system exceeds the potential operability and Open integration capacity of most, if not all, other systems available today.

### Open System Cost

There are recurring costs associated with installing the Open capability of the O'Hare SMS. Siemens minimizes these costs by installing Open technology panels and hardware as part of the regular repair and replacement program under the current maintenance contract, and by utilizing existing Siemens network infrastructure.

A replacement of the current SMS with any other system whether touted as Open or not would require the replacement of most of the existing hardware and software including communication media, standalone and dedicated control systems, custom programming, and graphics. Additionally, there would be

significant operator interface factors associated with a system replacement, including downtime and loss of productivity during the changeover, the myriad of potential installation problems and staff training

While difficult to pinpoint without actually engineering the project, the cost for the replacement of the existing SMS at O'Hare could easily exceed $20,000,000.

## Unique Corporate Capability

It is acknowledged that some of the *individual* professional disciplines can be provided by other SMS providers or service entities. However, the ability to provide *all* of the disciplines required to meet the obligations of the contract is unique to Siemens. This unique capability includes the ability to provide:

- a dedicated team with the required skill sets needed to maintain the ORD system at peak performance and reliability
  - ⇒ team represents over 74 years of experience exclusively at O'Hare
  - ⇒ over 163 years industry experience (see Resumes)
  - ⇒ overlapping of skill sets insures backup support
  - ⇒ entire team is factory-trained
- staffing of the daily/full time requirements and 24 hours/365 day emergency requirements with the same expert staff
- over 80% of the hardware and software for this system
- 100% of the integration and the necessary man/machine interfaces to systems of other manufacturers
- preferred customer discounts on repair/maintenance material
- open and cost effective solutions to maintaining the O'Hare Building Management Systems for over thirteen years
- a comprehensive *local* manufacturer / R&D expert engineering team when additional experience is required to expedite solutions; this represents the highest level of service available anywhere
- a proven track record of cooperation with the DOA

***Benefit:***

⇒ SMS receives highest level of repair and maintenance support

***Unique Capability:***

⇒ System operates at maximum reliability and performance levels

## Scope of Service

### Contracting

- The Contractor shall perform all network preventive maintenance, installations, training and Software Support Services as it relates to the Fire Life Safety, SMS, and other related networked building controls required in a satisfactory manner, as determined by the Commissioner or designated representative.
- Services of major nature will require approval of the City
- Services of a minor nature are previously authorized by the Commissioner; approval of the subcontract by the City will not be required.
- All billing shall be at actual cost with markups added as stated herein.

The Contractor shall provide the Services listed below in accordance with attached Schedule(s):

1. **Special Services:**

   a. **Management Level Network and Servers:**
   - The Contractor will provide a full-time Account Supervisor and a full time Systems Engineer Monday through Friday, 7am to 4pm, throughout the year for system operation, integration and upgrades to system and equipment, and to provide on-site assistance and training at the H&R Plant.
   - Account Supervisor and System Engineer are in addition to the Contractor's employees performing preventive maintenance, service tasks and system installations and upgrades.

   b. **Building Level Networks and Controllers:**
   - The Contractor will provide a minimum of four full-time System Specialists, one full time fire safety test and inspect specialist and one full time mechanic Monday through Friday, 7am to 4pm, throughout the year to perform scheduled preventive tasks, on all components of the SMS and BMCS and other interconnected or networked building controls as identified in the List of Maintained Equipment.
   - The Contractor shall also perform regular working hour repair and replacement and upgrade tasks as required or directed. Additional personnel shall be provided as necessary to complete scheduled and required tasks.

c. **Mechanical Controls and Systems:**
- Contractor shall provide one full time mechanical fitter to inspect, service, upgrade and install the mechanical control devices of this system.

d. **Control Systems Electrical Contractor:**
- Contractor shall provide specialized electrical installation capability for dedicated controllers interlocks and fiber optic and fire life safety system installation.
- Contractor shall retain the full time services of a highly skilled control system electrical contractor

e. **System Engineering and Consultation:**
- Contractor will provide professional engineering staff as required for fire / life safety, energy management, mechanical, electrical, process control, hydronics, and other engineering disciplines as required.

f. **Project Manager:**
- Contractor will provide for a Systems Level Project Manager. When required, services of this manager will be at the standard Account supervisor rate.

g. **System Preventive Maintenance:**
- Contractor shall perform preventive maintenance in accordance with a program of standard maintenance routines as determined by the contractor's experience, equipment application and location, the manufacturer's recommendations and as directed by the Commissioner.

h. **Wide Area Network:**
- Contractor shall consult and recommend repairs, updates, and enhancements of the network as required or directed by the Commissioner. Additionally, contractor will
    * Maintain the airport-wide fiber network.
    * Inventory all existing equipment throughout the airport and maintain and store spare equipment
    * Complete a review of existing network configuration and recommend network performance enhancements
    * Monitor network system and support software

i. **Updates:**
- Contractor shall provide control system software, firmware and hardware updates as they become available.
- 3rd party systems with proprietary designs or components may be subcontracted to qualified vendors, if required

j. **Graphic User Interface:**
- Contractor shall create or modify graphics and other user interface tools as required for OPEN integration of all systems to ensure that the interface continues to meet the City's needs.

k. **System Backups:**
- Contractor shall backup graphics, databases and program sequences on a weekly basis or as necessitated by changes to system
- In the event of system failure, contractor shall reload the graphics databases and system files from their most current backup copy

l. **Field Panel Database/System File Backup:**
- Contractor shall backup each field panel database and system file weekly as necessitated by changes to system.
- In the event of a panel failure, Contractor shall reload the database from their current backup copy

m. **Field Panel Database Diagnostics:**
- Contractor shall perform field panel diagnostics, analyze the results and make recommendations or implement changes to optimize building control performance of all related or networked building controls and systems

n. **Control Loop Evaluation and Tuning:**
- Contractor shall provide evaluation and tuning of the critical control loops to maintain peak system control and efficiency as building and mechanical system characteristics change.
- Planned renovations and expansions will greatly increase this number.
- Currently over 1000 Proportional Integral and Derivative (PID) Control Loops programmed into the Airport Building Control System

- energy management control within the Air Handling Units,
- equipment critical for the heating and cooling or control of the airport facilities
- pumping,
- taxiway Bridge Deicing.

- The check list for the preventative maintenance of control loops:
  * Dynamically plot and evaluated overall system performance for improper damping or instability which results in energy loss or poor operation.
  * Check, clean, and calibrate input sensors.
  * Verify sensor readings with the controller and, recalibrate, and replace as required.
  * Test and verify input and output levels of controllers.
  * Verify controller response against input signals
  * Check response and stability of control devices in relation to control elements, and adjust as necessary.
  * Tune the process variables within the controller as necessary.
  * Inspect operation of mechanical systems and verify functionality of the integrated system.
- Work with city personnel, trades or contractors on maintenance and control issues, writing work orders and following up on problem in a timely manner.
- Analyze and submit for review recommendations to improve system performance

**System Consultation:**

- Contractor shall provide system consultation to assist the operator(s) in isolating, identifying, resolving and verifying system problems. Contractor will provide system support from three sources.
  * On-Site technical staff as stated herein
  * Local installation and integration engineers. Contractor will call upon addition staff to supplement on site staff if additional expertise is required
  * Day-to-day monitoring of control system performance shall be performed by city personnel; Siemens technical staff will provide support as required.

**Software Consultation:**

- Contractor shall provide software consultation to resolve software issues.
- Contractor will provide software support from three levels.
  * On-Site technical staff as stated herein.
  * District Wide Installation and Integration Engineers. Contractor will call upon addition staff to supplement on site staff if additional expertise is required
  * Corp headquarters product design and manufacturing engineers. Escalation of problems to this level if necessary represents the highest level of service available. With one of the industry most extensive engineering staffs in Chicago, response to requests for support can be provided onsite within hours if needed. Evaluation of field conditions can be monitored and evaluated in a timely manner.

4. **Fire Alarm System Testing:**

a. Contractor shall test the following Fire Alarm System devices at the frequencies recommended by National Fire Protection Association Standard 72. The following is a summary of equipment covered and NFPA 72 preventive maintenance procedure frequencies:

| | |
|---|---|
| Manual Fire Stations | Twice per year |
| Heat Detectors | Twice per year |
| Smoke Detectors | Once per year |
| Alarm Indicating Appliances | Once per year |
| Fire Door Releases | Once per year |
| Sprinkler System Components | Once every 2 months |
| Fire Alarm System Control Units | Once per year |
| Auxiliary/Municipal Tie | Once every 2 months |
| Remote/Central Station | Once per year |

Testing of all Smoke Control System sequence is part of this Contract and included here.

b. Corrective Maintenance and Component Replacement: Contractor shall repair or replace failed or worn components to minimize system obsolescence and to maintain in peak operating condition. Contractor shall upgrade equipment by systematically modernizing existing components as directed and approved by the Commissioner. Components that are suspected of being faulty may be repaired or replaced in advance, with the prior approval of the Commissioner, to prevent system failure. Labor costs are included within the scope of this Technical Support Program, material costs are not included. Materials will be charged against the parts allowance.

5. **System Performance Services – Review and Evaluation:**

**Account Management:** Contractor shall provide dedicated account manager to coordinate the delivery of services, offer technical assistance for system programs and engineered control strategies, and implement the quality assurance program.

6. **Owner Training**

a. On-Site During Scheduled Visits. Contractor shall provide ongoing operator training during scheduled site visits.

b. On-site Professional Trainer Contractor shall provide a professional trainer and class materials (CD's, videos, manuals, workbooks, etc.) as requested by the Commissioner.

c. Training Station Materials Contractor shall provide listed training center materials for use by DOA.

d. Off-site Classes Contractor shall provide annual list of available training classes to DOA and recommend attendance plan.

7. **Emergency Options for System Performance Services:**

a. **Response Window- Monday Through Sunday, 24 Hours Per Day:** Contractor shall provide emergency service between scheduled preventive maintenance calls, Monday through Sunday, including holidays, 24 hours per day to minimize downtime. City will determine the need for Emergency services.

b. **On-line Response Within Hours:** Contractor shall respond via modem within 2 hours to requests for corrective maintenance during the emergency response window specified. If remote diagnosis determines a site visit is required to complete troubleshooting procedures, Contractor shall be on-site within the response time selected below.

c. **On-site Response Within 4 Hours:** Contractor shall be on-site to provide emergency service within 4 hours. Non-emergency calls, as determined by the City will be incorporated into the next scheduled work day.

8. **Documentation and Quality Assurance:**

a. **Documentation of all Service Provided:** Contractor shall document each on-line and on-site service call and furnish the City with a copy showing time, date and a brief description of activity. Work orders for on-site system preventive maintenance will list the inspection date, individual to report to, equipment identification, equipment location, work to be preformed and any special instructions. Upon completion, work orders for on-site system preventive maintenance shall be signed by the appropriate City representative confirming that the service has be completed.

b. **Quality Assurance Program:** Contractor shall meet with the City to evaluate system performance and review the quality of service that is being provided under the Technical Support Program.

9. **Fire Alarm and Smoke Control System Service:** Fire Alarm and Smoke Control System Component Testing will be as described herein and in accordance with local and national codes.

## LIST OF MAINTAINED EQUIPMENT

| System Components | Preventive Maintenance, Repair and Replacement | System Integrity Testing | Not Covered/ Not Applicable |
|---|---|---|---|
| Central Control Panel | X | | |
| Remote Control Units | X | | |
| Annunciators | | X | |
| Outputs to Central Station Transmitters | | | X |
| Primary Power Input | X | | |
| Secondary Power Input | X | | |
| Initiating Devices | | X | |
| Indicating Appliances | | | X |
| Duct Smoke Detectors Indicating Appliances | X | | |
| Indicating Device Circuits | | X | |
| Initiating Device Circuits | | X | |
| Smoke Control Panels | | | X |
| Smoke Dampers | | X | |
| Fire Dampers | | | X |
| Firefighter's Smoke Control Station | | | X |
| Ceiling Smoke Detectors | X | | |
| Heat Detectors | X | | |

N/A = Not Applicable

Network/SMS Hardware

| EQUIPMENT | QTY | MANUFACTURER |
|---|---|---|
| **COMPUTERS** | | |
| APOGEE DATABASE SERVER | 1 | |
| APOGEE WORKSTATIONS | 35 | |
| MONITORS | 36 | |
| PRINTERS | 10 | |
| Delta Workstations | 2 | Siemens/Delta |
| Overhead Projector | 1 | |
| Apogee Software | ALL | |
| **NETWORK** | | |
| CISCO1200 SWITCH | 11 | CISCO |
| CISCO1400 CONCENTRATOR | 3 | CISCO |
| CISCO2820 SWITCH | 1 | CISCO |

| | | |
|---|---|---|
| CISCO SOHO91 | 1 | CISCO |
| MEDIA CONVERTERS | 14 | |
| HUBS | 5 | |
| SWITCHES FOR DELTA | 22 | |
| **FIELD PANELS** | | |
| BLN FIELD PANELS | 300 | SIEMENS |
| FLN FIELD PANELS | 279 | SIEMENS |
| TEC | 221 | SIEMENS |
| AEM 100(ETHERNET) | 3 | SIEMENS |
| 15 MODEMS | 10 | |
| Delta Control Panel(1616E) | 22 | Siemens/Delta |
| DSM50(BACnet BBMD) | 1 | Siemens/Delta |

## Power

| **UPS UNITS** | | |
|---|---|---|
| OCC | 1 | LIEBERT |
| EB1 | 1 | BEST |
| DNC1 | 1 | BEST |
| DNC2 | 1 | BEST |
| DNC3 | 1 | BEST |
| DNC4 | 1 | BEST |
| DNC5 | 1 | BEST |
| DNC10 | 1 | BEST |
| HR | 1 | BEST |
| HR | 8 | BEST |
| AMC | 1 | BEST |
| PC3 LVL6 | 1 | BEST |
| FIELD PANELS UPS | 22 | DELTA |

## HVAC

| **AC UNITS** | | |
|---|---|---|
| OCC | 4 | LIEBERT |
| HR | 2 | LIEBERT |
| **AHUs** | | |
| Full Control | 104 | |
| Static Control | 4 | |
| AHU Control Delta Interface | 22 | Siemens/Delta |
| **Heat exchangers** | | |
| Full Control | 25 | |
| **Air Compressors** | | |
| Air Compressors(full control) | 5 | |

## Miscellaneous

| EQUIPMENT | QTY | MANUFACTURER |
|---|---|---|
| **Carbon Monoxide Systems** | | |
| UAL Baggage Area | 1 | Draeger |
| AAL Baggage Area | 1 | Draeger |
| H&R | 1 | Draeger |
| **People Movers** | | |
| Elevators | 92 | |
| Travelators | 29 | |
| Escalators | 69 | |
| **LIFT STATIONS** | | |
| Touhy Lift (EAST/WEST) | 1 | |
| Daytona Beach(full control) | 1 | |
| Lake O'Hare | 1 | |
| Burn Pit | 1 | |
| Miami Beach | 1 | |
| North Stormwater | 1 | |
| **FIRE SYSTEM** | | |
| FCC CPU(DATABASE) | 6 | Edwards/Siemens |
| IRC FIELD PANELS | 143 | Edwards/Siemens |
| Annunciator panels,Evac Horns | 14 | |
| Okidata Serial fire printers | 6 | Edwards/Siemens |
| McDaniel Pre-action panels | 3 | |
| Phoenix Pre-action (Bldg8)new | 6 | Phoenix |
| Airbase | 42 | |
| Snow tunnel | 1 | |
| Burn Pit | 1 | |
| Remote Parking | 1 | |
| **HALON SYSTEMS** | | |
| Ats1,2,3,5 | 4 | |
| Oats Maint BLDG | 1 | |
| Occ | 1 | |
| Oats TSP BravoStations | 1 | |
| Amc Building | 1 | |
| H&R | 1 | |

## Network Equipment List

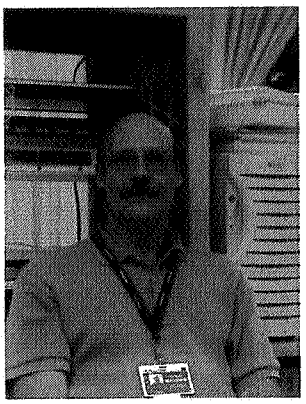
| CISCO EQUIPMENT | LOCATION | OTHER NET EQUIPMENT |
|---|---|---|
| Concentrator 1400 | | |
| Catalyst 1200 | | |
| Catalyst 1200 | DNC1 | Media Conv |
| B-side / C-side | | Media Conv / Enet HUB |
| Concentrator 1400 | DNC2 | Media Conv |
| Fddi single mode line card | | mini repeater fiber / utp |
| Catalyst 1200 | | |
| | | 1 mini repeater fiber / utp |
| | T2 apex engineers off | 1 mini repeater fiber / utp |
| Catalyst 1200 | Burlington building | |
| Concentrator 1400 | Airside Network Shed | |
| Catalyst 1200 | DNC3 | CISCO ROUTER Media Conv (3) |
| Catalyst 1200 | DNC5 | |
| | Terminal 3 telcom rm | |
| Catalyst 1200 | DNC4 | |
| Concentrator 1400 | DNC7 | Media Conv |
| Catalyst 1200 | | |
| Catalyst 2820 | | |
| | H&R COMM RM | Enet Hub |
| Catalyst 1200 | DNC8 | Media Conv |
| | T5 upper level office | Enet Hub |
| | DNC10 | 1 mini repeater fiber / utp |
| | AMC | 2 mini repeater fiber/utp |
| Catalyst 1200 | Radio Shop | |
| Catalyst 2820 w/ high speed | Terminal 2 phone RM | |
| Cisco high speed hub | | |
| | AMB | 1 mini repeater fiber/utp |
| * These devices are serviced by Siemens as part of the Supervisory Monitoring System. Devices not listed to be serviced via task order. | | |

# Staff Resumes

SIEMENS BUILDING TECHNOLOGIES

## Dale H. Stilwell

### ORD Experience: 14 years



**Current / Proposed Position:**
ORD Systems Manager / Senior Account Engineer

**Qualifications for Service on the Contract:**

* Fourteen (14) years experience as account engineer and manager of Building Management Systems, Networks, Energy Conservation, Design and Install of same at O'Hare International Airport.
* 6+ years experience System Integration, Kinetic Systems Corporation Design and Install High Speed Data Acquisition and Control Systems for U.S. and Foreign Aero Space and Defense Industries, Government Labs, Energy Related Industries, and Industrial Research and Development
* 10 years experience Instructor in Electronics, Digital Control System Design and Manufacturing

**Related Experience:**

* Implementation of networking, controls, fire and life safety systems at O'Hare International Airport
* Install and design of fiber optic cable network throughout the O'Hare International Airport
* Managing the Installation and maintenance of the HVAC control, fire and security systems at O'Hare International Airport
* Extensive experience integrating systems regulated under U.S NIM and European ESONE committees, ANSI/IEEE Standards, STD 1155, STD 583, STD 960

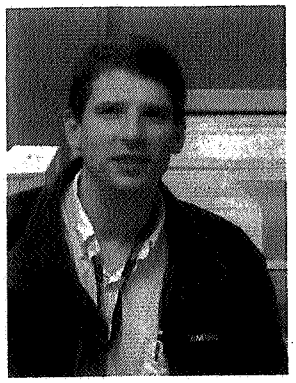
**Education:**

* Illinois State University
* University of Wisconsin – Madison
* Western Illinois University
* Southern Illinois University

**SIEMENS BUILDING TECHNOLOGIES**

# Michael J. Stefka

**ORD Experience: 8 Years**



**Current / ProposedPosition:**
System\Service Account Engineer

**Qualifications for Service on the Contract:**

* Eight years experience installing & maintaining the Building automation systems and computer network equipment at O'Hare International Airport.
* Microsoft Certified in Windows NT 4.0, Server and Enterprise systems.

**Related Experience:**

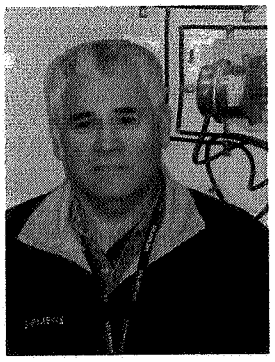
* 9+ years experience as a maintenance electrician performing preventive maintenance, troubleshoot & repair of all machine \ plant

  equipment

**Education:** Joliet Junior College

**SIEMENS BUILDING TECHNOLOGIES**

# VICTOR H. LOPEZ



**ORD Experience: 23 Years**

**Current / Proposed Position:**
Systems Foreman / Pipe fitter / Mechanic

**Qualifications for Service on the Contract:**

* Twenty-three years experience at O'Hare International Airport as Foreman / Pipe Fitter / Mechanic on installations. Retrofitting, and service HVAC, Temperature Control Systems, Screw Compressors, Air Dryers, Trouble Shooting Automation Systems.
* Mechanical Forman for Siemens (Landis Gyr Powers) during construction of United Airlines Terminal One.
* Ten Years additional experience With Siemens in Temperature Control, Automation Systems, Installation and retrofitting as Foreman at CNA Towers Chicago IL. and Abbott Laboratories North Chicago IL.

**Related Experience:**

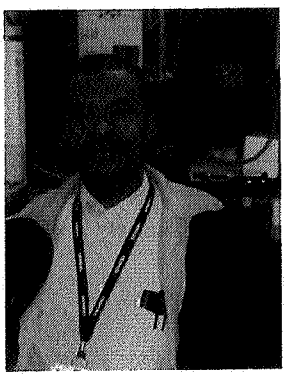
* Installation and Retrofitting of all remodeling and constructions at O'Hare International Airport
* Performing prevented maintenance in all Automation Systems at United Airlines O'Hare.
* Testing and calibration of Carbon Monoxide devices at O'Hare International Airport
* Installation of all Cease Fire Halon Extinguisher throughout the Airport.
* Installation, maintenance and repair of the Screw Compressors and Air Dryers at United Airlines
* Implemented training classes in Pneumatics at O'hare International Airport

**Education:** Training Courses in Computers and Electronics
Oakton Community College.
High School Guatemala City.

**SIEMENS BUILDING TECHNOLOGIES**

# Keith A. Cameron

**ORD Experience: 14 Years**



**Current / Proposed Position:**
Senior Service Specialist

**Qualifications for Service on the Contract:**

* Fourteen (14) of years as Service Specialist at the O'Hare International Airport, I have been responsible for installation, upgrade, programming and service for the Building Automation System and Fire Alarm System.
* Ten additional years experience as a service Specialist with Siemens in the Building Automation industry.
* 2+ years experience as a Field Service Technician with Honeywell Information Systems, responsible for repairs of main frame computers, printers, card readers and tape drives.
* 3 years experience in the United State Army as a field Radio repair man

**Related Experience:**

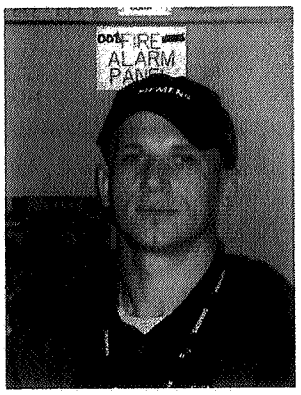
* Service and maintenance of the HVAC controls at the following places
  - O'Hare International Airport
  - Illinois State University
  - Chicago State University
  - Governors State University
  - St. Francis Hospital
  - Ravenswood Hospital
  - Lutheran General Hospital

**Education:** United States Army Armor School
Coyne American Institute
Devry Institute of Technology

**SIEMENS BUILDING TECHNOLOGIES**

# Tomasz Kubik

**ORD Experience: 4 Years**




**Proposed Position:** System\Service Specialist

**Qualifications for Service on the Contract:**

* Four (4) years at the O'Hare International Airport as a service Specialist in the Life and Safety Systems (Fire and Building Automation industry.) I have been responsible for install, upgrade, program, operate, test, troubleshoot and maintain Life and Safety Systems and service for the Building Automation System.
* 11 years with Siemens Building Technology.
* 7 years experience in Electronic Computer Technology.

**Related Experience:**

* Technician Siemens Manufacturing
* Serviced, troubleshot and programmed Surface Mount Technology Machines and Through Hole Insertion Machine

**Education:**

* DeVry University.
* Edward System Technology Inc
    - Certified in EST3, FCC, IRC-3 Fire Courses
    - factory training as required by NFPA 72 for hardware, installation,
    - networking and programming of the Fire Systems
* SIEMENS BUILDING TECHNOLOGIES
    - Certified in HVAC control concepts, troubleshooting
* CREATE
    - Certified in CM86,CM86-M1,SP10-MA high speed chip mounter,
* UNIVERSAL
    - Certified in 4681A GSM

**SIEMENS BUILDING TECHNOLOGIES**

# Michael D. Fargusson

**ORD Experience: 7 Years**

**Current / Proposed Position:**
System\Service Specialist

**Qualifications for Service on the Contract:**

* Five years experience installing & maintaining the Building Automation, HVAC and Fire systems at O'Hare International Airport.
* Two years additional experience of Installation and maintenance of the HVAC control, fire and computer systems prior to being assigned to the O'Hare Airport site.
* 11+ years experience maintaining Xerox equipment, preventive maintenance, troubleshooting & repair of all machines in a given territory.

**Related Experience:**

* 11+ years experience maintaining Xerox equipment, preventive maintenance, troubleshooting & repair of all machines in a given territory.

**Education:** Harper College, Rock Valley College.

**SIEMENS BUILDING TECHNOLOGIES**

# Cynthia Ericsson

**ORD Experience: 3 Years**

**Current / Proposed Position:**
System\Service Specialist

**Qualifications for Service on the Contract:**

* Three years experience installing & maintaining the Building Automation Systems equipment at O'Hare International Airport
* Five + additional years experience as a System Specialist at Siemens Building Technologies, Chicago Branch, installing & maintaining the Building Automation Systems equipment at various customer sites.

**Related Experience:**

* Five years experience building and troubleshooting electronic devices at Motorola, Inc.

**Education:** A.A.S., Electronics Technology, DeVry University

**SIEMENS BUILDING TECHNOLOGIES**

# Scott A. Osborne

**ORD Experience: 3 years**

**Current / Proposed Position:**
Systems Specialist

**Qualifications for Service on the Contract:**

* Three years experience of design, installation, and start-up of a variety of HVAC systems at O'Hare International Airport.
* 18 years additional experience as a Stationary Engineer.

**Related Experience:**

* As Lead Engineer, worked on coal-fired HTW generators, pumps, stoker grates, ash handling equipment, air compressors, vacuum pumps, and other plant equipment.
* As Stationary Engineer, worked on high-pressure steam boilers and related equipment, pumps, medical air compressors, vacuum pumps, building automation systems, and fire systems.

**Education:** A.A.S. Electronics Technology
A.A.S. Heating, Ventilation, and Air-Conditioning

**Professional Licenses:** City of Chicago Stationary Engineer
City of Denver Stationary Engineer
N.I.U.L.P.E. Second Class Engineer
EPA CFC Certification

Ref Cobb (55)

# CPAC PROJECT CHECKLIST

For CPAC Team Use Only
Date Received
Date Returned
Date Accepted

**IMPORTANT:** PLEASE READ AND FOLLOW THE INSTRUCTIONS FOR COMPLETING THE PROJECT CHECKLIST AND CONTACT THE APPROPRIATE TEAM LEADER IF YOU HAVE ANY FURTHER QUESTIONS. ALL INFORMATION SHOULD BE COMPLETED INCLUDING THE SUPPLEMENTAL CHECKLIST REQUIRED BY THE SPECIFIC CPAC TEAM. ATTACH ALL REQUIRED MATERIALS AND SUBMIT FOR HANDLING TO THE DEPARTMENT OF PROCUREMENT SERVICES, ROOM 403, CITY HALL, 121 N. LASALLE STREET, CHICAGO, ILLINOIS 60602.

PROJECT Date: 6/14/04
ID No (Spec, RX, Project):
Department: Aviation
Bureau: Facilities
Contract No (if known):
Project Title/Description: Maintenance of SMS 600 Building Mgmt System at O'Hare Intl

Contact Person: Dave Bowman
Tel: 686-7089 Fax: 6866235 E-mail: DBOWMAN@d
Project Manager: Paul Brown
Tel: 686-7310 Fax: E-mail: Groupwise
Estimated Value $ 10,500,000

SCOPE STATEMENT — Sole Source Justification & Contractor Proposal Attached.

✓ attached is a detailed scope of services and/or specification

**IMPORTANT:** THIS IS A CRITICAL PORTION OF YOUR SUBMITTAL. IN ORDER FOR A TEAM TO ACCEPT YOUR SUBMITTALYOU MUST COMPLETE ALL TEAM SPECIFIC SCOPE REQUIREMENTS AS SET FORTH IN THE SUPPLEMENTAL CHECKLIST FOR THAT TEAM.

**The following is a general description of what would be included in a Scope of Services or Specification:**
A clear description of all anticipated services and products, including: time frame for completion, special qualifications of prospective vendors, special requirements or needs of the project, locations, anticipated participating user departments, citation of any applicable City ordinance or state/federal regulation or statute.

TYPE OF PROCUREMENT REQUESTED (check all that apply)
__Competitive Bid __RFQ/RFP/RFS/RFI ✓Sole Source** __Term Agreement __One Shot
__Mod/Amendment __Time Extension __Additional Funding __Small Order __S/O Emergency

FORMS
__F-25* (add line item) __F-10* (special approvals) __SSRB** (sole source approval)
__F-26* (new term agreement) __RX (one-shot requisition) __OBM Authorization
X F-27* (time extension) __APRF (all purpose request form)
__F-29* (change vendor limit)

** Sole source requests must include vendor quotes/proposal and MBE/WBE compliance requirements

FUNDING
City: __Corporate __Bond ✓Enterprise __Grant* __Other
State: __IDOT/Transit __IDOT/Highway __Grant* __Other
Federal: __FHWA __FTA 740 __FAA 85 4035 0162 0162 __Grant* __Other
Funding Strip(s):

* Attach copy of any applicable grant agreement terms and conditions

TIME FRAME
Date Needed: 10/1/04
Requested Contract Term (y/m/d): 10/1/04 - 9/30/09

PRE BID/SUBMITTAL REQUIREMENTS
Requesting Pre Bid/Submittal Conference? __Yes ✓No Requesting Conference be Mandatory? __Yes ✓No
Requesting Site Visit? __Yes ✓No Requesting Site Visit be Mandatory? __Yes ✓No

RECEIVED
JUN 1 - REC'D
Dept of Purchases
Aviation Unit

# CPMC PROJECT CHECKLIST

## ARCHITECTURAL/ENGINEERING SUPPLEMENTAL CHECKLIST

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

N/A

Risk Management

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

Will services be performed on or near a waterway? __Yes __No

Pre-Qualification Category No._____ Category Description:_____

For Pre-Qualification Program, attach list of suggested firms to be solicited

Other Agency Concurrence Required:__None __State __Federal __Other (fill in)_____

## AVIATION CONSTRUCTION SUPPLEMENTAL CHECKLIST

DOA sign-off for final design documents: __Yes __No

N/A

Required Attachments:

Copy of Draft Contract Documents and Detailed Specifications.

Risk Management:

Current Insurance Requirements prepared/approved by Risk Management: Yes___ No___

Will work be performed within 50 feet of CTA or ATS structure or property? Yes___ No___

Will work be performed airside? Yes___ No___

## CAPITAL EQUIPMENT (VEHICLES) SUPPLEMENTAL CHECKLIST

Required Attachments:

__ Detailed Specifications including detailed description of the vehicle(s) or equipment, mounted equipment, if any, and options/accessories.

__ Special Provisions (Delivery, Warranty, Manuals, Training, Additional Unit Purchase Options, Bid Submittal Information, etc.)

N/A

__ Delivery Location(s)

__ Technical Literature

__ Drawings, if any

__ Part Number List (___Manufacturer; or ___ Dealer; ___ or Other Source: _____)

__ Copy of current Price List(s)/Catalog(s)

__ Form F-10 or other authorization document

__ Any other exhibits and attachments

## COMMODITIES SUPPLEMENTAL CHECKLIST

N/A

Required attachments:

__Copies of price lists, catalogs, drawings, variations of part numbers

__Any other exhibits or attachments

## CONSTRUCTION SUPPLEMENTAL CHECKLIST (LARGE & SMALL)

Required attachments: Copy of Draft (80% Completion)

N/A

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

Risk Management

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

Will services be performed on or near a waterway? __Yes __No

# CPAC PROJECT CHECKLIST

N/A

## DELEGATE AGENCY SUPPLEMENTAL CHECKLIST

Required attachments:

Attach Scope of Services that includes the following information 1) Program background & objectives; 2) Type of services for which proposals are sought; 3) Location and time line for delivery of services; 4) Qualifications, skills, and/or experience necessary; 5) Special licenses or certifications required; 6) Evaluation process (if known).

Other Attachments (please submit all that apply)

1. Copy of grant application and/or grant agreement
2. Evidence of award authority (DAAC agenda with agency name highlighted; City Council ordinance with agency name highlighted; or OBM letter)
3. Modification information (Copy of Form F-8A; screen print of EPS AWDS table)

Does program require Executive Order 91-1 clearance? __Yes __No
Is boilerplate from Law available or in production? __Yes __No
Would your department benefit from technical assistance? __Yes __No

## HARDWARE/SOFTWARE SUPPLEMENTAL CHECKLIST

N/A

__ITSC (approved by BIS)

__OBM (approved by Budget form/memo)

Attach any documentation indicating any previous purchase activity to assist in the procurement process

__Grant document attached

## PROFESSIONAL SERVICES SUPPLEMENTAL CHECKLIST

N/A

__ Detailed scope of services as described on page 1.
__ The Schedule of Compensation
__ Deliverables
__ Request for individual contract services (if applicable)
__ The appropriate EPS form

*** If this is a Telecommunications/Utilities project, please also address the following:**

Has the project been reviewed by DGS? __Yes __No
Attach copy of DGS Recommendation; Reservation(s); or participate under current contract.
Does the project include software? __Yes __No
If yes, is signed ITSC form attached? __Yes __No
Does the location involve:
A public way? __Yes __No
Any concession in the City's facilities? __Yes __No
Is it anticipated City Council approval of the project or contract will be required? __Yes __No

# CPAC PROJECT CHECKLIST

## SMALL ORDERS SUPPLEMENTAL CHECKLIST

Yes No

___ ___ 1. Special Approval Form/Justification Letter.
e.g. (Emergency Contract, Telecommunication Back-up documents, Proposals , EPS Form F-10, etc.,).
___ ___ 2. Suggested Vendor.
___ ___ 3. Commodity Code, Manufacturer, Catalog Information, Model No., Quantity, Unit Cost/Measure, Color etc.,
___ ___ 4. Detailed Specification or Scope of Work.

## ATTACHMENT REQUIRED FOR EACH SMALL ORDERS PROCUREMENT TYPE

(Check Appropriate Group)

1. ONE SHOT (PN)

YES ( ) NO ( ) Detailed Specifications
YES ( ) NO ( ) Suggested Vendor
YES ( ) NO ( ) Support Documentation

2. SOLE SOURCE REQUIREMENTS

YES ( ) NO ( ) Vendor Proposal
YES ( ) NO ( ) Disclosure Affidavit
YES ( ) NO ( ) Letter of Exclusive or Unique Capability
YES ( ) NO ( ) Support Documentation from Vendor/Manufacturer.
YES ( ) NO ( ) Signature(s) of Originator or Departmental Head/Designee.

3. EMERGENCY CONTRACT

YES ( ) NO ( ) Justification Letter
YES ( ) NO ( ) Vendor Proposal
YES ( ) NO ( ) Pre-assigned Requisition (RX)

N/A

4. TELEPHONE/FAX BIDS

YES ( ) NO ( ) Justification Letter

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## WORK SERVICES & FACILITY MAINTENANCE SUPPLEMENTAL CHECKLIST

Required Attachments: Detailed Specifications (Scope of Services) including detailed description of the work, locations (with supporting detail), user department contacts, work hours/days, laborer/supervisor mix, compensation and price escalation considerations, contract term and extension options, contractor qualifications, citation of any applicable City/State/Federal statutes or regulations, citation of any applicable technical standards and price lists, catalogs, technical drawings and other exhibits and attachments as appropriate.

Risk Management

Will services be performed within 50 feet of CTA train or other railroad property? __Yes ✓No
Will services be performed on or near a waterway? __Yes ✓No
Will services require the handling of hazardous/biowaste material? __Yes ✓No
Will services require the blocking of streets or sidewalks in any way?
Which may affect public safety? __Yes ✓No

Sole Source Contract request to replace expiring PO # T25779