

PHILIPPO

JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT

COMPLETE THIS SECTION IF NEW CONTRACT

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 _____ for the product and/or services described herein.
 _____ (Name of Person or Firm)
 This is a request for _____ (One-Time Contractor Requisition # 33706, copy attached) or _____ Term Agreement or
 _____ Delegate Agency (Check one). If Delegate Agency, this request is for "blanket approval" for 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., its relationship to the original contract and the specific reasons for the change. Indicate both the original and the adjusted contract amount and/or expiration date with this change, as applicable. Attach copy of all supporting documents. Request approval for a contract amendment or modification to the following:

Contract #: T26594
 Specification # B19242008
 Modification #: _____

Company or Agency Name: Jeannerett AKA Valtera
 Contract or Program Description: Development of Promotional Process for the Ranks of Lieutenant and Sergeant

(Attach List, if multiple)
Ann M. Nakaguchi Human Resources 5/31/07
 Date Signature Department

Ann Nakaguchi 312 744-9691
 Originator Name Telephone

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

<input type="checkbox"/> PROCUREMENT HISTORY	SEE ATTACHMENT
<input type="checkbox"/> ESTIMATED COST	SEE ATTACHMENT
<input type="checkbox"/> SCHEDULE REQUIREMENTS	SEE ATTACHMENT
<input type="checkbox"/> EXCLUSIVE OR UNIQUE CAPABILITY	SEE ATTACHMENT
<input type="checkbox"/> OTHER	SEE ATTACHMENT

S. S. R. B.
 DATE 6/8/07
 APPROVED DWY
 CONDITIONALLY APPROVED _____
 RETURN TO DEPT. _____
 DISAPPROVED _____

APPROVED BY: [Signature] DEPARTMENT HEAD OR DESIGNEE
6/11/07 DATE
[Signature] BOARD CHAIRPERSON
6/8/07 DATE

DPS PROJECT CHECKLIST

For DPS Use Only	
Date Received	_____
Date Returned	_____
Date Accepted	_____
CA/CN's Name	_____

IMPORTANT: PLEASE READ AND FOLLOW THE INSTRUCTIONS FOR COMPLETING THE PROJECT CHECKLIST AND CONTACT THE APPROPRIATE UNIT MANAGER IF YOU HAVE ANY FURTHER QUESTIONS. ALL INFORMATION SHOULD BE COMPLETED, 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.

GENERAL INFORMATION:

Date: June 7, 2005
 REQ #: 33706
 Specification #: B19242008

PO #: (if known): _____

Modification #: (if known) _____

Contact Person:
 Tel: 744-0534 Fax: 744-4371
 E-mail: Geoffrey.patterson@cityofchicago.org

Project Manager: Ann Nakaguchi
 Tel: (312) 744-9691 Fax:
 E-mail: anakauchi@cityofchicago.org

Project Description: Police Lieutenant Promotional Exam Previous PO(s)#: (if known) _____

FUNDING:

- City: Corporate Bond Enterprise Grant* Other
 State: IDOT/Transit IDOT/Highway Grant* Other
 Federal: FHWA FTA FAA Grant* Other

LINE	FY	FUND	DEPT	ORGN	APPR	ACTV	OBJT	PROJECT	RPTG	\$ DOLLAR AMOUNT
	07	0100	99	2005	0140	0140	0140	000000	0000	\$ 0.00

Estimated Value

* IF GRANT FUNDED, A COPY OF THE APPROVED GRANT AND APPLICATION ARE REQUIRED and any other Terms and Conditions that may apply.

SCOPE STATEMENT

Attached are a **Detailed Scope of Services** and/or **Specification(s)**.

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

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

A clear description of all anticipated services and products, include: timeframe 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)

NEW REQUEST

- Blanket Agreement
 Standard Agreement
 Small Orders

MOD/AMENDMENT

- Time Extension
 Vendor Limit Increase
 Scope Change/Price Increase/Additional Line Item(s)
 Other (specify): _____

FORMS: Requisition Special Approvals Non-Competitive Review Board (NCRB)

CONTRACT TERM: Requested Term (number of months): _____ Months

DPS PROJECT CHECKLIST

PRE BID/SUBMITTAL REQUIREMENTS:

Requesting Pre Bid/Submittal Conference?

Yes No

Requesting Site Visit? Yes No

N/A

ARCHITECTURAL/ENGINEERING SUPPLEMENTAL CHECKLIST

N/A

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

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

If applicable, Pre-Qualification Category #: _____ 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

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

COMMODITIES SUPPLEMENTAL CHECKLIST

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

If Modification request, please verify and provide the following:

Contractor's Name:

Contractor's Address:

N/A

Contractor's E-mail Address:

Contractor's Phone Number:

Contractor's Contact Person:

CONSTRUCTION SUPPLEMENTAL CHECKLIST

Required attachments:

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

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

DPS PROJECT CHECKLIST

WORK SERVICES/FACILITY MAINTENANCE SUPPLEMENTAL CHECKLIST

N/A

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

Risk Management:

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

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

Contractor's Name:

Contractor's Address:

Contractor's E-mail Address:

Contractor's Phone Number:

Contractor's Contact Person

**CITY OF CHICAGO
 PURCHASE REQUISITION**

Copy (Department)

DELIVER TO: 033- CH 1100 121 N. LA SALLE ST. ROOM 1100 Chicago, IL 60602	REQUISITION: 33706 PAGE: 1 DEPARTMENT: 33 - DEPARTMENT OF HUMAN RESOURCE: PREPARER: Rodregais Thomas NEEDED: APPROVED: 5/25/2007
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REQUISITION DESCRIPTION

MODIFICATION: JEANNERET AND ASSOCIATES, T26594, EXAMINATION AND TESTING SERVICES
 SPECIFICATION NUMBER: B19242008

COMMODITY INFORMATION

LINE	ITEM	QUANTITY	UOM	UNIT COST	TOTAL COST						
1	92420 EXAMINATION AND TESTING SERVICES	1.00	USD	0.00	0.00						
SUGGESTED VENDOR:											
REQUESTED BY: Rodregais Thomas											
DIST	BFY	FUND	COST CTR	APPR	ACCNT	ACTV	PROJECT	RPT CAT	GENRL	FUTR	Dist. Amt.
1	007	0100	0994433	0140	220140	0000	00000000	000000	00000	0000	0.00
LINE TOTAL:											0.00
REQUISITION TOTAL:											0.00

133480

Where a commodity is for a particular or unique use other than standard quality, grades, color, size or other characteristics, give details of how it will be and for what purpose.
 Requisitions prepared incorrectly will be returned to the using department.



City of Chicago
Richard M. Daley, Mayor

Department of Human Resources

Jacqueline P. King
Commissioner

City Hall, Room 1100
121 North LaSalle Street
Chicago, Illinois 60602-1209
(312) 744-4966 (Voice)
(312) 744-1521 (FAX)
(312) 744-2563 (TTY)

<http://www.cityofchicago.org>

Administration

Employment Services

Information Services

City Hall, Room 1100-1102

(312) 744-4962 (Voice)

(312) 744-4976 (Voice)

(312) 744-4954 (Voice)

(312) 744-1521 (FAX)

Employee Assistance Program

(312) 747-0399 (Voice)

(312) 747-8970 (FAX)

Office of Compliance

Labor Relations

Sexual Harassment

Workforce Compliance

DePaul Center, Suite 330

333 South State Street

Chicago, Illinois 60604-3973

(312) 747-8960 (Voice)

(312) 747-8975 (Voice)

(312) 747-8988 (Voice)

(312) 747-8981 (Voice)

(312) 747-8971 (FAX)

Strategic Services

DePaul Center, Suite 520

333 South State Street

Chicago, Illinois 60604-3975

(312) 747-7277 (Voice)

(312) 747-0405 (FAX)

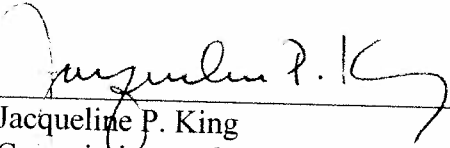
(312) 747-8972 (Voice)

(312) 747-8971 (FAX)

MEMORANDUM

TO: Barbara Lumpkin
Chief Procurement Officer
Department of Procurement Services

ATTN: Claude Humphrey
Deputy Procurement Officer

FROM: 
Jacqueline P. King
Commissioner of Human Resources

DATE: June 1, 2007

SUBJECT: **REQUEST FOR MODIFICATION AND FOUR MONTH TIME EXTENSION OF AN EXISTING CONTRACT**

Contract: Examination and Testing Services

Vendor: Jeanneret & Associates, Inc.

Vendor Number: 1042669A

Specification Number: B19242008

Term Agreement Number: T26594 (FMPS)

Original Expiration: 1 Aug 2004

Current Expiration: 1 Aug 2007

Requested Extension: 2 Aug 2007 to 1 Dec 2007

The Department of Human Resources wishes to request a modification to the scope of services and exercise a four month time extension of the above-referenced sole source contract. A modification is necessary to complete the City's obligation to develop and administer the Police Lieutenant promotional examination. Due to problems encountered during the administration of the second portion of the exam on January 6, 2007, the City is re-administering this portion on June 23, 2007.

Jeanneret as the test developer is now required to take on additional duties outside of the scope contained within the original contract. (See attached Presentation) In addition to the changes in scope, costs for additional services are estimated at \$133,680.

NEIGHBORHOODS





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Department of Human Resources

Jacqueline P. King
Commissioner

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NEIGHBORHOODS



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31 May 2007

Justification Memo, Jeanneret & Associates AKA Valtera Corporation

These additional responsibilities will also extend the targeted completion of the exam process beyond the August 1st expiration date of Jeanerret's contract. Therefore I am requesting a four (4) month extension.

The funding strip is 07-100-994433-0140.

Should you have questions relative to this request please contact Ann Nakaguchi at 312-744-9691.

Thank you for your assistance.

JPK/GP

Cc: Michelle Burton
Ann Nakaguchi
Geoffrey L. Patterson
Department of Human Resources

John O'Brien
Department of Procurement Services



CITY OF CHICAGO POLICE DEPARTMENT

ADDITIONAL SCOPE OF SERVICES RELATED TO:

DEVELOPMENT OF PROMOTIONAL PROCESSES FOR THE RANKS OF LIEUTENANT AND SERGEANT

Submitted by

VALTERA 

Valtera Corporation
601 Jefferson, Suite 3900
Houston, TX 77002
713-650-6535

May 2007

RECEIVED

MAY 24 2007

DEPARTMENT *www.chicagopolice.org*

INTRODUCTION

This Additional Scope of Services is submitted by Valtera Corporation (formerly Jeanneret & Associates, Inc.) to the City of Chicago to address additional work activities and associated costs that have been (or will be) required to complete the Promotional Processes for the ranks of Lieutenant and Sergeant in the Chicago Police Department. These activities have been undertaken at the request of the City and were not included in the original Scope of Services and related budget proposed by Valtera.

Sergeant Promotional Process

Valtera's original Scope of Services included costs that were based on an estimated 3,000 candidates participating in the Sergeant Assessment Exercise. In actuality, a total of 3,626 candidates took this component of the exam, resulting in additional costs to conduct scoring activities for the extra 626 people.

Lieutenant Promotional Process

Due to the test administration problems that occurred during the Lieutenant Oral Assessment Exercise that was administered on January 6, 2007, Valtera has been asked to conduct the following additional activities:

Review Tapes for Administration Problems. Valtera was asked to conduct a review (separate from any scoring activities) of the 661 tapes related to the original Oral Assessment Exercise. The purpose of this review was to identify and document test administration problems (to be used for verification of the results obtained by the City's test administration contractor's audit) and to provide information to the City about various strategies that might be taken to address complaints related to these problems.

Oral Assessment Exercise Re-Test. Due to the City's decision to administer a voluntary re-test of the Oral Assessment Exercise portion of the Lieutenant Promotional Process, Valtera will be required to conduct a number of additional activities. These activities will include producing a modified version of Oral Assessment Exercise video, preparing new candidate preparation information, reviewing new test instructions, attending the re-test administration, meeting with the CPD Sr. SME panel regarding scoring guidelines, and conducting two rounds of independent scoring for the candidates who take the re-test.

REVIEW TAPES FOR ADMINISTRATION PROBLEMS

The following work steps describe the activities required to complete the review of the 661 tapes related to the original Oral Assessment Exercise for the purposes of identifying test administration problems and providing information to the City about various strategies that might be taken to address them. Costs for these activities are presented in the final section of this Scope of Services.

Work Step 1: Meeting with City and Ernst & Young

At the City's request, Valtera consultants met with key representatives from the City of Chicago Departments of Law and Human Resources, as well as representatives from the City's test administration firm (Ernst & Young) regarding the Lieutenant Oral Assessment Exercise that was administered on January 6, 2007. During this meeting, a number of issues were discussed, including the necessity to document the extent of the test administration problems related to complaints received from candidates. The representatives from each party agreed on a strategy to identify the scope of the problem, including method of documentation and time frame.

Work Step 2: Conduct Tape Review

Valtera consultants conducted a thorough and structured review of all of the cassette tapes related to the 661 candidates who took the original Oral Assessment Exercise. Each candidate's testing session was recorded in full on an individual tape, which contained documentation of the test administration process (e.g., instructions given, equipment operation, interaction with the Ernst & Young proctor, etc.) as well as the candidate's test responses. The consultants prepared detailed instructions and trained a team of reviewers to listen to the tapes and document relevant test administration issues. Each tape took approximately 20–30 minutes to process.

Work Step 3: Review and Discuss Results

Valtera consultants compiled the documentation of test administration issues across reviewers. These data were analyzed to determine overall counts of occurrences of relevant incidents according to a coding system devised by Ernst & Young. Multiple telephone conferences were held with City and Ernst & Young representatives to compare results and come to agreement on final documentation of types of test administration problems and numbers of candidates potentially affected.

ORAL ASSESSMENT EXERCISE RE-TEST

The following work steps describe the additional activities that will be required of Valtera consultants based on the City's decision to administer a voluntary re-test of the Oral Assessment Exercise portion of the Lieutenant Promotional Process. The costs for these activities are presented in the final section of this Scope of Services.

Work Step 1: Prepare Modified Version of Video

Valtera will prepare a modified version of the Oral Assessment Exercise video, which will be used to present the background information and test questions to which the candidates respond during the re-test. Modifications will be made only at the request of Ernst & Young representatives (with approval by the City) to address specific test administration issues by minimizing the involvement of proctors. No changes will be made to the content of the test itself.

Work Step 2: Develop Candidate Preparation Information

Prior to the original administration of the Lieutenant Assessment Exercises, Valtera consultants prepared a detailed candidate preparation guide that provided candidates with information about the test format, purpose, and instructions; as well as sample test materials and practice items. For the proposed re-test, the consultants will prepare a modified version of the candidate preparation materials to include information related only to the Oral Assessment Exercise and any changes to the re-test administration procedures.

Work Step 3: Review Test Administration Instructions

At the City's request, Valtera consultants will review the test instructions that Ernst & Young prepares for their representatives who will be involved in proctoring and/or monitoring the re-test of the Oral Assessment Exercise. This review will ensure that the individuals who are interacting with the re-test candidates are given instructions that comply with the intended test administration procedures.

Work Step 4: Attend Re-Test Administration Session

A Valtera consultant will attend the Oral Assessment Exercise re-test session scheduled for June 23, 2007. The consultant will be available to respond to test-related questions that candidates may have during the re-test administration.

TIME FRAME AND COSTS

Schedule for Completion

Regarding the increased scoring effort required for the Sergeant Assessment Exercise, all of the activities have been completed as outlined in the Valtera's original Scope of Services. The rank-ordered list containing the final scores for all 3,626 candidates was submitted to the City in October 2006.

All of the activities also have been completed relating to the review for administration problems of the 661 tapes for the Lieutenant Oral Assessment Exercise. At the request of the City, this effort was conducted in April 2007.

At the direction of the City, activities related to the re-test of the Lieutenant Oral Assessment Exercise are currently underway. Valtera has delivered the candidate preparation information, which is being distributed during the application period from May 16–29, 2007. Valtera has met with representatives from the City and Ernst & Young to discuss requested administrative changes to the Oral Assessment Exercise video and is in the process of preparing the modified version for use in the re-test. Valtera will deliver (via secured means) to Ernst & Young the new video and will conduct a review of the proctor instructions prior to the re-test administration scheduled for June 23, 2007. As soon as possible after that date, the meeting with the CPD Sr. SMEs will be conducted. Scoring activities will be conducted as quickly as possible, while maintaining emphasis on accuracy of the results. Depending on the number of candidates who elect to participate in the re-test, scoring could be completed within 6–8 weeks of test administration.

NOTE: Due to the City's decision to conduct the re-test of the Oral Assessment Exercise on June 23, 2007, the remainder of the activities to be conducted for the Lieutenant Promotional Process cannot be completed before the current contract expires on July 31, 2007. Therefore, the contract will need to be extended to allow for completion of scoring of the Assessment Exercises, conducting analyses regarding the results, meeting with City representatives, and documenting the project activities and outcomes in a technical report.

REFERENCES

- American Education Research Association, American Psychological Association, & National Council on Measurement in Education. (1999). *Standards for educational and psychological testing*. Washington, DC: American Psychological Association.
- Equal Employment Opportunity Commission, Civil Service Commission, Department of Labor, & Department of Justice. (1978). Uniform guidelines on employee selection procedures. *Federal Register*, 43, 38290-38315.
- Society for Industrial and Organizational Psychology. (2003). *Principles for the validation and use of personnel selection procedures* (4th ed.). College Park, MD: Author.