

CITY OF MILWAUKEE – DOA – PURCHASING DIVISION  
REQUEST FOR EXCEPTION TO BIDDING / SBE PARTICIPATION



**PART A: General Information**

Today's Date: 6/17/16 Requisition # 14749  
Contact Person for Questions: Richard Li Phone: 414-286-2319  
Dollar Amount: \$300,000 for 3 years  
Department Name: Comptroller  
Funding Source (General Funds, Grant, CDBG, Capital Funds, etc.): General Funds

**PART B: Office of Small Business Development (OSBD) Analysis**

This section of the form is to be completed by the User Department. Please contact OSBD at 286-5553 to determine the appropriate participation requirements. If a change in subcontractor is being requested, please attach a new Form A and/or letter requesting the change.

SBE % 0%  
If 0%, please explain: Not enough qualified SBE vendors  
Vendor Name(s): 1 vendor: Hurtado Zimmerman S.C.

**PART C: Reason for Requesting an Exception to the Bidding Process**

Brief description of the item or service being purchased, and what it is being used for (for example, what project, initiative, or system does it support or replace):

Legal Services for Debt Issues (Disclosure Counsel Services)

The time of performance will be from 7/1/2017 to 6/30/2020

If services have already commenced, or the purchase has already been made, explain why:

**Check the reason(s) why a bidding process cannot be used:**

- ☒ A Request for Proposal (RFP) is requested (please explain in the "Additional Information" section on Page 2)
- ☒ Professional, artistic, scientific or creative services.
- ☐ Impossible or impracticable to develop bidding specifications.
- ☐ Experimental purpose
- ☐ Experimental purpose – single or sole source requested. (please explain in the "Additional Information" section on Page 2)
- ☐ Sole Source (applies if only one known source of supply is available):
- ☐ Patented product only available from the manufacturer.
- ☐ Proprietary software.
- ☐ Public utility service which has a monopoly.
- ☐ Component or replacement part(s) available from only one source.
- ☐ Other (please explain in the "Additional Information" section)
- ☐ Single Source (applies when there are other vendors who could potentially provide the goods/services, but one particular vendor must be used for one of the reasons stated below):
- ☐ Only local authorized / licensed distributor.
- ☐ Compatibility is the overriding consideration and the item is available from only one source.

- ☐ Used item that is immediately available, is not usually available, and is subject to prior sale.
- ☐ Product is needed for trial or testing.
- ☐ Additional needs discovered in the midst of a project – e.g., change orders.
- ☐ No other supplier can meet the required delivery date.
- ☐ No other supplier can make on-call repairs at a particular location.
- ☐ Vendor has specific insight from previous knowledge of service or commodity.
- ☐ Vendor has been specified by terms of grant (federal or state) or by City Resolution.
- ☐ Other (please explain in the "Additional Information" section)

**Additional Information:**

For single/sole source requests, please explain why the bidding process cannot be used:

How was the previous contract procured, and what was its dollar value and the funding source?  
RFP in 2012. \$600,000 for 3 years.

For Single Source requests, Departments must provide a list of the three vendors contacted below, and submit their quotes or response to the request for a quote. Listed below are the three vendor(s) contacted for pricing and their quotes or response.

Vendor Name	Vendor Contact Person	Phone / E-mail

**IMPORTANT NOTICES:**

- Per City Charter Section 16.05-4, prior approval by the Finance & Personnel Committee may be required for service contracts. For details, please see section 16.05-4 of the City Charter, the "Exception to Bid Process" in the Purchasing Liaison Manual or contact the Purchasing Division at 414-286-3501.
- Increases exceeding a certain percentage of the original estimated dollar amount of a contract are subject to analysis and may be required to be re-bid.

**PART D: Required Signatures**

Department Head	<i>Master Motion</i> (electronic signatures are acceptable)	Date	6-20-16
OSBD Business Analyst	<i>M. [Signature]</i>	Date	6/28/16
Purchasing Agent	<i>Tykesha White</i>	Date	
<input type="checkbox"/> Approved <input type="checkbox"/> Denied			

Completed forms may be submitted via e-mail to [procurement.services@milwaukee.gov](mailto:procurement.services@milwaukee.gov) or interoffice mail.