



**DEPARTMENT OF PROCUREMENT SERVICES
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION**

Complete this cover form and the **Non-Competitive Procurement Application Worksheet** in detail. Refer to the page entitled "Instructions for Non-Competitive Procurement Application" for completing this application in accordance with its policy regarding NCRB. Complete "other" subject area if additional information is needed. Subject areas must be fully completed and responses merely referencing attachments will not be accepted and will be immediately rejected.

Department Office of the Mayor	Originator Name Maria Guerra	Telephone 312-744-2460	Date 10/17/17	Signature of Application Author
Contract Liaison Yasmin Rivera	Email Contract Liaison yasmin.rivera@cityofchicago.org	Telephone 312-744-9991		

List Name of NCRB Attendees/Department	
Maria Guerra Yasmin Rivera	Office of the Mayor Office of the Mayor

Request NCRB review be conducted for the product(s) and/or service(s) described herein.

Company: Melissa Green

Contact Person: Melissa Green	Phone: 202-494-9554	Email: green_m68@hotmail.com
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Project Description: Federal Advocacy Consulting Services

This is a request for:

New Contract

Amendment / Modification

Contract Type

Blanket Agreement Term: 12 (# of mo)

Standard Agreement

Type of Modification

Time Extension Vendor Limit Increase Scope Change

Contract Number: 42881

Specification Number: 225975

Modification Number: _____

Department Request Approval	Recommended Approval
 _____ DEPARTMENT HEAD OR DESIGNEE	 _____ BOARD CHAIRPERSON
<u>10-17-17</u> DATE	<u>10/20/17</u> DATE
Maria Guerra Lopez PRINT NAME	Richard Butler PRINT NAME

(FOR NCRB USE ONLY)

Recommend Approval/Date: _____

Return to Department/Date: _____

Rejected/Date: _____



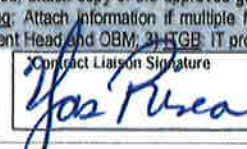
Approved Rejected

CHIEF PROCUREMENT OFFICER

10/20/17
DATE

Project Checklist


Attach required forms for each procurement type and detailed scope of services and/or specifications and forward original documents to the Chief Procurement Officer; City Hall, Room 806.

Date: 8/22/2017 Department Name: Office of the Mayor Requisition No: 182864 Specification No: 225975 PO No: 42881 Modification No: Contract Liaison: Yasmin Rivera Telephone: 312-744-9991 Email: yasmin.rivera@cityofchicago.org Project / Program Manager: Maria Guerra Telephone: 312-744-2460 Email: maria.guerra@cityofchicago.org Check One: <input type="checkbox"/> New Contract Request <small>*By signing below, I attest the estimates provided for this contract are true and accurate.</small> *Project / Program Manager Signature:  *Commissioner/Authorized Designee Signature: 	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <small>For blanket agreements, original or lead department must consult with other potential departments who may want to participate on the blanket agreement. If grant funded, attach copy of the approved grant application and other terms and conditions of the funding source. Note: 1) Funding: Attach information if multiple funding lines; 2) Individual Contract Services: include approval form signed by Department Head and OBM; 3) ITGB: IT project valued at \$100,000.00 or more, attach approval transmittal sheet.</small> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <small>*By signing this form, I attest that all information provided is true and accurate.</small> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Contract Liaison Signature  </div> Project Title: Project Description: Federal Advocacy Consulting Services Funding: <input checked="" type="checkbox"/> Corporate <input type="checkbox"/> Bond <input type="checkbox"/> Enterprise <input type="checkbox"/> Grant <input type="checkbox"/> Other: <input type="checkbox"/> IDOT/Transit <input type="checkbox"/> IDOT/Highway <input type="checkbox"/> FHWA <input type="checkbox"/> FTA <input type="checkbox"/> FAA <table border="1" style="width:100%; 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OFFICE OF MAYOR RAHM EMANUEL
CITY OF CHICAGO

To: Jamie Rhee, Commissioner, Department of Procurement Services

From: Maria Guerra 
Director, Legislative Counsel and Government Affairs
Office of the Mayor

RE: Extension of Contract for Federal Advocacy Consulting Services – Melissa Green

Date: August 22, 2017

The memorandum is to request a vendor limit increase (VLI) in the amount of \$102,000, through the non-competitive review board process, for the contract for the federal advocacy services of Melissa Green (Contract No. 42881). This contract was originally procured through the NCRB process in 2016, and its base term expired on August 9, 2017.

Pursuant to Section 3.3 of the contract, the Chief Procurement Officer may at any time before the contract expires elect to extend the contract for up to one year, under the same terms and conditions as this original contract. The contract was extended accordingly on August 8, 2017. The VLI requested in this memorandum is to fund this extension period at the same monthly rate of \$8,500 as under the base contract.

The original application/justification to the NCRB is attached. Except as outlined in this paragraph, the substantive sections of the original application/justification have not changed since it was submitted. First, elements of the application/justification regarding timing and scheduling requirements are not applicable to the extension period; however, as noted in the original application/justification, the request for NCRB approval was not based on timing needs but rather on the unique experience and abilities of the consultant. Second, the list of federal projects outlined in #3 of the Exclusive or Unique Capabilities section should be updated to the following:

- RIFF/Union Station
- Urban Agenda
- Freight/CREATE
- Port of Chicago
- Red/Purple Line Mod TIFIA/FFGA
- Airport Infrastructure projects

- Impacting federal regulations and waivers

Third, the Detailed Comps found in Appendix 1 should be replaced with the attached Extension Period Appendix 1: Detailed Comps.

Federal funding, legislation, and administrative actions have and will continue to significantly impact the operations and finances of the City. As such, it is critical that the City have an effective advocate in Washington, D.C., representing the City's interests at a high level. As detailed further in the complete application to the Board, Green is uniquely qualified to perform these much needed services for the City.

Green has worked as Chief of Staff to the Director of the White House Office of Management and Budget (the agency that decides which programs make it into the federal budget and how federal funds flow); has an extensive network of agency, congressional, and organizational contacts in Washington, D.C.; and has real knowledge of and history with the projects and issues that are priorities for the City. For these reasons, it would be highly advantageous to the City to continue to contract her services during the coming year.

Thank you, and please do not hesitate to contact me with any questions or concerns.



**DEPARTMENT OF PROCUREMENT SERVICES
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION
JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET**

All applicable information on this worksheet must be addressed using each question found on the "Instructions for Non-Competitive Procurement Application" in this application.

Justification for Non-Competitive Procurement Worksheet

PROCUREMENT HISTORY

1. Due to the importance of federal funding, legislation, and administrative actions on the operations and finances of the City, the City of Chicago has consistently had a presence in Washington, D.C. That presence has taken various forms throughout the years. Prior to mid-2011, the City's D.C. office staff ranged from 5-7 employees. In addition, several City departments and sister agencies had contracts with D.C. lobbyists. (Chicago Public Schools had a full time D.C. staffer who was paid \$110,000/year and leased space from the Council of Great City Schools; Chicago Department of Aviation paid McCann Capitol Associates \$250,000/year; Chicago Transit Agency also paid McCann Capitol Associates \$250,000/year and contracted with former Congressman Bill Lipinski for state and federal work.) Since the start of this administration, the City's D.C. office has functioned with a staff of three employees. (CPS' separate D.C. presence was terminated immediately at the start of the administration; CDA's McCann contract was cut significantly and then terminated in 2014; CTA's McCann contract was cut in half and then terminated in 2012; and Congressman Lipinski's contract focused only on state work.) As of April 1, 2016, the City's D.C. office transitioned to a two-person team. The team will report to the Mayor's Office, Legislative Counsel and Government Affairs. In addition to the two full time City staff based in D.C., the City will also rely on the services of a D.C. consultant, leveraging D.C. expertise to keep the office effective and nimble.

With the change in structure from an office of three City staff to an office of two City staff with the services of a consultant, it was determined that Melissa Green ("Consultant") is uniquely qualified to perform these consulting services for the City. Green was the Director of the City's Washington, D.C. office from the start of this administration through April 1, 2016, when she left City employment. Her unique qualifications and expertise are discussed in detail in the appropriate section below.

2. This will be a first time requirement for this administration. Prior to 2011, lobbyists or other consultants were engaged by the City for work in Washington, D.C.

3. There have been no efforts to competitively bid this requirement as it is believed the Consultant is uniquely situated to be the best provider of the required services to the City.

4. The City is seeking a consultant to spearhead the City's federal advocacy agenda and efforts, representing the City's interest on all matters before the White House, federal agencies, and Congress. There are primarily two firms in Washington, D.C. – Patton, Boggs, and Squire and Holland & Knight – that have large 'city' practices, providing similar services to many cities. However, there are critical reasons why these firms do not meet the City's current needs: (1) these firms have no background with or understanding of the City and its priorities and no prior experience representing Chicago under this administration; and (2) these firms already represent 16 and 21 cities respectively, making Chicago just another client. There are also boutique firms and several solo practitioners providing similar services in D.C., but again none of these practitioners have represented Chicago in recent years and thus have little to no knowledge of the City's federal needs and priorities or local relationships and partnerships, and all have multiple cities as clients and therefore split their time, attention, and resources between cities. In contrast, as further discussed below, the Consultant is intimately familiar with the City and its legislative, policy, and funding priorities and will have only Chicago as a city client.

5. It is possible that there will be future requests made for the services of the Consultant. This will depend on the City's needs and any further evolution in the structure of the City's D.C. office.

6. The expertise and qualifications that are critical to federal advocacy consulting – including relationships within both City government and federal government, as well as a history with and understanding of the needs and priorities of the City and how these needs and priorities intersect with federal policy, regulation, legislation, and funding – are often specific to an individual. As such, it is likely that such services will continue to be procured through the public



**DEPARTMENT OF PROCUREMENT SERVICES
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JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET**

non-competitive procurement process.

ESTIMATED COST

1. The estimated cost for the proposed contract is \$8,500 per month. The funding source is budget line 9121 ('For Payment of Costs Associated with Lobbyist Activities on Behalf of the City of Chicago').
2. The estimated annual cost under the proposed contract is \$102,000.
3. This cost is based on the contract cost under similar agreements with legislative consultants representing the City in Springfield, as well as on the cost of other cities' contracts with Washington, D.C. firms who perform the same type of work. Please see Appendix 1, attached, for a detailed discussion of comparable contracts and associated fees.
4. N/A
5. The proposed contract cost is in line with similar agreements with legislative consultants representing the City in Springfield. In addition, the information in Appendix 1 informed negotiations with the Consultant. These figures were used to confirm that the proposed cost is a strong value. The proposed cost is less than the costs paid by many other cities for comparable services, including smaller and less complex city clients.

SCHEDULE REQUIREMENTS

1. As discussed in Item 1 under Procurement History, above, the restructuring of the office, scheduled to occur during Q2 of 2016, includes the engagement of a federal advocacy services consultant to do a portion of the work formerly done by staff in the City's D.C. office. Discussions about the restructuring of the office began in Q1 of 2016.
2. N/A
3. Ideally, a contract for federal advocacy consulting services would be in place as soon as possible. The services would continue for one year, with an option to extend for an additional one year, pursuant to the proposed contract. The desire to make this transition and engage the Consultant as soon as possible is driven in part by the timing of national elections and the change in Administration. The next 12 month period spans the end of the current President's term and the beginning months of an incoming administration. The end and beginning of administrations in D.C. are critical periods for securing funding and influencing policy. Having the new structure in place and the Consultant fully functioning for this period will be financially and operationally advantageous to the City as it seeks to capitalize on federal opportunities that present only as a Presidential administration closes down. The City has several large projects, each in the hundreds of millions of dollars, one in the billions of dollars, in front of the current Administration, and a disruption in the City's representation in D.C. could negatively impact those projects.
4. While the reason for not competitively bidding these services is not to expedite the process (but rather based on the unique qualifications of the Consultant), the timing of the transition (and the engagement of the Consultant) is critical for the reasons discussed in Item 3 above.

EXCLUSIVE OR UNIQUE CAPABILITY

1. There are a number of factors that contribute to the Consultant's unique qualifications for this work – her work with the White House Office of Management and Budget (OMB), her extensive network in Washington, D.C., and her knowledge of and history with the projects and issues that are priorities for the City. Each is outlined here.

The Consultant served as the Chief of Staff to the Director of the OMB during the first two years of the current Administration, and the Consultant continues to have strong relationships with OMB staff. These relationships are critical because of the nature and importance of the OMB. The OMB is the single most important agency in in the federal budget process. OMB decides which programs make it into the federal budget and which do not, how federal funds flow, and when and whether federal regulations are released. In sum, OMB is the intersection of legislation, regulation, and funding. It is also notoriously difficult for outsiders to navigate. The Consultant has in-depth knowledge and understanding of the institution and its processes, as well as relationships with the individual decision-makers in the agency.

The Consultant is a Washington, D.C. native, which has allowed her to build a personal network throughout the federal government, national trade organizations, and national think tanks. Unlike many D.C. consultants/lobbyists who transient, the Consultant's relationships – including relationships with congressmen, senators, and cabinet



**DEPARTMENT OF PROCUREMENT SERVICES
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION
JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET**

secretaries – are personal and longstanding. In addition, the Consultant served in the past two Democratic White Houses (Presidents Clinton and Obama), forming lasting and relevant connections in those Administrations. These relationships will be used to benefit the City and only the City.

Finally, the Consultant has been the only Director for Federal Affairs for the City since 2011, through which she has gained a deep understanding of the city, its local officials, its residents, and its funding and regulatory needs. The Consultant has strong relationships with all City commissioners and agency heads and their staffs. This longstanding trust, respect and proven track record is valuable to this work and is not transferrable.

As discussed above, the current White House Administration has only 8 months left. These final months of this Administration, and the beginning months of the next administration, are critical for funding and agenda setting. The Consultant's relationships within this Administration and knowledge of all prior and pending City projects and priorities put her in the best position to effectively represent the City during this time. It is imperative that the City have a person who is familiar with (a) the City's priorities and funding needs and (b) the way in which funding will flow at the federal level, during this period.

2. N/A

3. In addition to the general qualifications discussed in Item 1 above, the Consultant has specific experience that makes her uniquely qualified to provide these services at this time. The Consultant has been the City's Washington, D.C. lead for the following federal projects:

- RIFF/Union Station
- New Markets Tax Credits
- Urban Agenda
- TIGER/Garfield Park
- Freight/CREATE
- LED lighting projects
- Red/Purple Line Mod TIFIA/FFGA
- Securing unused federal funds
- Impacting federal regulations and waivers

1. Many of these projects have been in development for six months or more, and several for more than 15 months. The Consultant has a deep understanding of these projects and strong working relationships with the City staff and federal agency staff involved in these projects. It would be very difficult for someone new to catch-up and deliver on these projects in the truncated time period that remains in the current Administration, and there is potential that such a disruption could result in the loss of funding opportunities for the City.

4. N/A

5. See Items 1 and 3, above.

6. N/A

7. N/A

8. N/A

OTHER
N/A

Appendix 1: Detailed Comps

- At least 50 cities have direct contracts with the two main Washington, D.C. lobbying firms that have large state and city practices:
 - Holland and Knight represents 21 cities, including San Francisco, Phoenix, Seattle, Philadelphia, Charlotte and Atlanta. The two largest contracts, for cities with 1/3 and 1/7 of Chicago's population, are \$400,000.
 - Squire, Patton and Boggs represents 16 cities, including Las Vegas, San Antonio, San Diego, Portland and New Orleans. The largest contracts, for cities with 1/5 Chicago's population or less, are \$200,000.
 - The straight monthly average of all city contracts at these two firms is \$12,700/month. This includes cities as small as Rockville, MD, population 66,000, and Key West, FL, population 25,000.
 - A list of cities represented by these two firms and their rates can be found on the following page.
- In addition to the two main firms, there are several solo practitioners who provide similar representation to about 12 additional cities.
- Market research indicates that smaller firms and solo practitioners generally represent multiple cities on a per project basis, with contracts ranging from \$35,000 to \$90,000 annually.

CITY	TOTAL	POPULATION
<u>HOLLAND & KNIGHT</u>		
City San Francisco, CA	\$400,000	852,000
City of Atlanta, GA	\$400,000	456,000
City of Aurora, CO	\$120,000	348,000
City of Austin, TX	\$200,000	912,000
City of Charlotte, NC	\$200,000	809,000
City of Des Moines, IA	\$80,000	612,000
City of Edinburg, TX	\$160,000	83,000
City of Fremont, CA	\$120,000	214,000
City of Key West, FL	\$80,000	25,000
City of Norfolk, VA	\$160,000	245,000
City of Philadelphia, PA	\$80,000	1.5 million
City of Phoenix, AZ	\$280,000	1.5 million
City of Richmond, CA	\$80,000	109,000
City of Rockville, MD	\$80,000	66,000
City of Sacramento, CA	\$70,000	485,000
City of Santa Ana, CA	\$80,000	335,000
City of Seattle, WA	\$90,000	668,000
City of Tampa, FL	\$120,000	359,000
City of West Palm Beach, FL	\$120,000	104,000
City of West Sacramento, CA	\$120,000	485,000

SQUIRE PATTON BOGGS

City of Baton Rouge, LA	\$200,000	446,000
City of Boise, ID	\$40,000	216,000
City of Cincinnati, OH	\$50,000	298,000
City of Commerce, CO	\$90,000	52,000
City of Greenville, SC	\$80,000	483,000
City of Lakewood, WA	\$25,000	61,000
City of Las Vegas, NV	\$160,000	614,000
City of Mesa, AZ	\$160,000	465,000
City of Mesquite, TX	\$40,000	144,000
City of New Orleans, LA	\$200,000	384,000
City of Portland, OR	\$200,000	619,000
City of Richmond, VA	\$160,000	218,000
City of Riverside, MO	\$120,000	471,000
City of San Antonio, TX	\$70,000	1.4 million
City of San Diego, CA	\$160,000	1.3 million



**DEPARTMENT OF PROCUREMENT SERVICES
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INSTRUCTIONS FOR NON-COMPETITIVE PROCUREMENT APPLICATION**

INSTRUCTIONS FOR PREPARATION OF NON-COMPETITIVE PROCUREMENT APPLICATION

If a City Department has determined that the purchase of supplies, equipment, work and/or services cannot be done on a competitive basis, a justification must be prepared on this "Justification for Non-Competitive Procurement Application" in which procurement is requested on a or non-competitive basis in accordance with 65 ILCS 5/8-10-4 of the Illinois Compiled Statutes. Using this instruction sheet, all applicable information must be addressed on the worksheet. The information provided must be complete and in sufficient detail to allow for a decision to be made by the Non-Competitive Procurement Review Board. For Amendments, Modifications, 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.

Attach a DPS Checklist and any other required documentation; the Board will not consider justification with incomplete information documentation or omissions.

PROCUREMENT HISTORY

1. Describe the requirement and how it evolved from initial planning to its present status.
2. Is this a first time requirement or a continuation of previous procurement from the same source? If so, explain the procurement history.
3. Explain attempts made to competitively bid the requirement (attach copy of sources contacted).
4. Describe in detail all research done to find other sources; list other cities, companies in the industry, professional organizations contacted. List periodicals and other publications used as references.
5. Explain future procurement objectives. Is this a one-time request or will future requests be made for doing business with the same source?
6. Explain whether or not future competitive bidding is possible. If not, explain in detail.

ESTIMATED COST

1. What is the estimated cost for this requirement or for each contract, if multiple awards are contemplated? What is the funding source?
2. What is the estimated cost by fiscal year?
3. Explain the basis for estimating the cost and what assumptions were made and/or data used (i.e., budgeted amount, previous contract price, current catalog or cost proposal from firms solicited, engineering or in-house estimate, etc.)
4. Explain whether the proposed Contractor or the City has a substantial dollar investment in original design, tooling or other factors which would be duplicated at City expense if another source was considered. Describe cost savings or other measurable benefits to the City which may be achieved.
5. Explain what negotiation of price has occurred or will occur. Detail why the estimated cost is deemed reasonable.

SCHEDULE REQUIREMENTS

1. Explain how the schedule was developed and at what point the specific dates were known.
2. Is lack of drawings and/or specifications a constraining factor to competitive bidding? If so, why is the proposed Contractor the only person or firm able to perform under these circumstances? Why are the drawings and specifications lacking? What is the lead time required to get drawings and specifications suitable for competition? If lack of drawings and specifications is not a constraining factor to competitive bidding, explain why only one person or firm can meet the required schedule.
3. Outline the required schedule by delivery or completion dates and explain the reasons why the schedule is critical.
4. Describe in detail what impact delays for competitive bidding would have on City operations, programs, costs and budgeted funds.

EXCLUSIVE OR UNIQUE CAPABILITY

1. If contemplating hiring a person or firm as a Professional Service Consultant, explain in detail what professional skills, expertise, qualifications, and/or other factors make this person or firm exclusively or uniquely qualified for the project. Attach a copy of the cost proposal, scope of services, and Temporary Consulting Services Form.
2. Does the proposed firm have personnel considered unquestionably predominant in the particular field?
3. What prior experiences of a highly specialized nature does the person or firm exclusively possess that is vital to the job, project or program?
4. What technical facilities or test equipment does the person or firm exclusively possess of a highly specialized nature which is vital to the job?
5. What other capabilities and/or capacity does the proposed firm possess which is necessary for the specific job, project or program which makes them the only source who can perform the work within the required time schedule without unreasonable costs to the City?
6. If procuring products or equipment, describe the intended use and explain any exclusive or unique capabilities, features and/or functions the items have which no other brands or models possess. Is compatibility with existing equipment critical from an operational standpoint? If so, provide detailed explanation?
7. Is competition precluded because of the existence of patent rights, copyrights, trade secrets, technical data, or other proprietary data (attach documentation verifying such)?
8. If procuring replacement parts and/or maintenance services, explain whether or not replacement parts and/or services can be obtained from any other sources? If not, is the proposed firm the only authorized or exclusive dealer/distributor and/or service center? If so, attach letter from manufacturer on company letterhead.

MBE/WBE COMPLIANCE PLAN

- * All submissions must contain detailed information about how the proposed firm will comply with the requirements of the City's Minority and Women Owned Business program. All submissions must include a completed C-1 and D-1 form, which is available on the Procurement Services page on the City's intranet site. The City Department must submit a Compliance Plan, including details about direct and indirect compliance.

OTHER

1. Explain other related considerations and attach all applicable supporting documents, i.e., an approved "ITGB Form" or "Request For Individual Hire Form".

REVIEW AND APPROVAL

This application must be signed by both Originator of the request and signed by the Department Head. After review and final disposition from the Board, this application will be signed by the Board Chairman. After review and final disposition from the Board, this form will be presented to the Chief Procurement Officer recommending approval.

Submit to: Soo Choi, Commissioner, Department of Human Resources

REQUEST TO USE PERSONAL SERVICES CONTRACTOR

Requesting department: Mayor's Office Date: August 9, 2017

Contact person and phone number: Maria Guerra, 312-744-2460

A. Please provide the following information (attach additional sheets if needed):

1. Name of the personal services contractor.

Melissa Green ("Consultant")

2. Explain why the contractor's services are necessary.

Federal funding, legislation, and administrative actions significantly impact the operations and finances of the City, and having an experienced advocate in Washington, D.C. is critical to ensuring that the City's needs and priorities are effectively represented at the federal level. Most if not all major cities are represented by federal advocacy firms or solo federal advocacy practitioners in D.C.

3. Describe the nature of the work to be performed.

In addition to the general descriptions provided in #4 below, please see attached Scope of Work.

4. Explain how the personal services contractor will function as an independent contractor and not function as employee-like (for guidance, please refer to attached criteria).

Criteria 1: See #2 above.

Criteria 2: Consultant will serve as the City's advocate and lobbyist on matters before the White House, federal agencies, and Congress. These services are similar in type to the services provided by contracted legislative consultants utilized by the City to advocate on State legislative and administrative matters in Springfield. See also attached Scope of Work.

Criteria 3: The City's legislative consultants function independently within their scope of work, while reporting back to the Mayor's Office, Legislative Counsel and Government Affairs. For example, Consultant will identify federal funding and policy opportunities for the City, develop strategies to achieve those

If you have any questions, please contact Christopher Owen, First Deputy, Department of Human Resources at 312-744-8395

APPENDIX A

opportunities, and perform advocacy in line with those strategies. The City will weigh in on prioritizing the opportunities identified by the Consultant, and may request work from the Consultant on additional specific projects.

Criteria 4 and 5: There are a number of factors that contribute to Consultant's unique qualifications for this work – her work with the White House Office of Management and Budget (OMB), her extensive network in Washington, D.C., and her knowledge of and history with the projects and issues that are priorities for the City.

The Consultant served as the Chief of Staff to the Director of the OMB during the first two years of the prior Administration, and the Consultant continues to have strong relationships with OMB staff (many key staff are career level, and thus did not changeover with the new Administration). These relationships are critical because of the nature and importance of the OMB. The OMB is the single most important agency in in the federal budget process. OMB decides which programs make it into the federal budget and which do not, how federal funds flow, and when and whether federal regulations are released. In sum, OMB is the intersection of legislation, regulation, and funding. It is also notoriously difficult for outsiders to navigate. The Consultant has in-depth knowledge and understanding of the institution and its processes, as well as relationships with the individual decision-makers in the agency.

The Consultant is a Washington, D.C. native, which has allowed her to build a personal network throughout the federal government, national trade organizations, and national think tanks. Unlike many D.C. consultants/lobbyists who transient, the Consultant's relationships – including relationships with congressmen, senators, and cabinet secretaries – are personal and longstanding. In addition, the Consultant served in the past two Democratic White Houses (Presidents Clinton and Obama), forming lasting and relevant connections in those Administrations. These relationships will be used to benefit the City and only the City.

Further qualifications are outlined in detail in the Non-Competitive Review Board Application completed for the procurement of these services, a copy of which can be provided upon request.

Criteria 6: With respect to the City's Washington D.C. office, see Criteria 7, below. In general, it is common practice to engage a consultant to provide high level outward facing advocacy services, at both the state and federal levels, with City government affairs employees working on policy issues and day to day operations. This allows the City to leverage the particular expertise and unique qualifications of an experienced consultant in an efficient manner, in light of sporadic legislative and funding cycles.

If you have any questions, please contact Christopher Owen, First Deputy, Department of Human Resources at 312-744-8395

APPENDIX A

Criteria 7: Consultant was the Director of the City's Washington, D.C. office from May 2011 until April 1, 2016, when she left City employment. In that role, she led the City's federal funding and policy efforts and ran the operations of the City's Washington D.C. office, managing the two other staffers in that office. This included determining priorities for the office and how staffers should divide time and effort amongst those priorities, developing policy- and funding-related plans for the D.C. team and ensuring that these were carried out, coordinating and participating in day-to-day interactions with Mayor's Office staff in Chicago, City departments, and legislative staff of the Illinois congressional delegation. This role also entailed the administrative work necessary to keep the City's Washington, D.C. office running, in coordination with administrative staff in Chicago.

As a contractor, Consultant functions as an outward-facing advocate/lobbyist for the City in Washington, D.C. She conducts advocacy on major legislation, projects, and funding opportunities with the White House, federal agencies, members of the Illinois congressional delegation, and other Washington, D.C. decision makers. Consultant does not manage any City staff, nor perform any of the administrative or policy coordination functions previously performed as the Director of the office. The remaining City employee(s) in the D.C. office handle policy research and proposal development, the tracking of prospective legislation and regulation, federal grant-writing, the administration of the City's D.C. office, and day-to-day interactions with City departments and legislative staff of the Illinois congressional delegation.

Criteria 8 and 9: The Consultant is currently and will continue to be a full time employee at a public affairs firm in Washington, D.C., performing government engagement work for private companies and non-profit organizations. (Consultant began work with this firm after leaving City employment.) While it is anticipated that the City will be Consultant's only municipal client in her individual capacity, her full-time work for her employing firm is similar to her work for the City in that it substantially involves engagement with and advocacy to legislators and government officials. Outside of existing ethics and conflict of interest rules, there would be no contractual restrictions on Consultant's ability to work for other clients.

Criteria 10 and 11: Consultant will not base her work out of City offices, and will not use City equipment or materials to conduct her work. Much of the work will be 'in the field,' meeting with agency, White House, and congressional staff. She will meet with City staff in the Washington D.C. office and with Chicago-based City staff on an as-needed basis.

Criteria 14: Due in part to the sporadic schedule (discussed in #5 below), Consultant will be paid a flat monthly rate after submission of an invoice detailing

If you have any questions, please contact Christopher Owen, First Deputy, Department of Human Resources at 312-744-8395

APPENDIX A

the hours and activities for that particular month. This fee arrangement is also used for the City's Springfield consultants.

- 5. Number of hours that the personal services contractor is expected to work per week:

Criteria 13: The number of hours worked by the Consultant will vary significantly from week to week based on the relevant activity in federal agencies, the White House, and Congress during a given week. Consultant will be obligated to perform the amount of work/hours necessary to provide the contracted services and achieve desired policy- and funding-related objectives.

- 6. Project(s) to which the personal services contractor will be assigned:

The Consultant will work independently on a range of projects, within the Scope of Work attached.



- 7. The duration of the assignment(s).

Criteria 12: The Consultant has been providing these services for approximately one year pursuant to Contract #42881, with a start date of August 10, 2016. This request coincides with the election to extend the contract for an additional year, pursuant to Section 3.3 of the contract.

8.	<u>Fund #:</u>	<u>Dept. #</u>	<u>Org. #</u>	<u>Approp.:</u>
	0100	099	4401	0140 or 9121

B. Please attach a copy of the contract.

.....
Department Head:  Date: 8/2/17

.....
DHR: Approved Not Approved  Date: 8/11/17
OBM: Approved Not Approved  Date: 8/22/17

If you have any questions, please contact Christopher Owen, First Deputy, Department of Human Resources at 312-744-8395

INDEPENDENT CONTRACTOR VS EMPLOYEE CRITERIA

Per the Policy On The Use of Non-City Employees To Perform Services For The City, the City may approve the use of a Personal Service Contractor only if the individual to be retained is a true independent contractor. The determination of what constitutes a true independent contractor depends on the specific circumstances of each case, and no one factor is determinative. However, all of the following criteria will be examined for each request to assess whether the engagement is truly independent contractor-like, and not employee-like:

- 1) The reasons the contractor is needed;
- 2) The nature of the work to be performed;
- 3) The extent to which City employees may exercise direction and control over the work, and how the work will be performed, as opposed to merely monitoring the end product to ensure that it satisfies the requirements of the contract;
- 4) The extent to which the work is highly specialized or requires particular skills or expertise;
- 5) The extent to which the contractor is uniquely skilled or qualified to perform the work;
- 6) The similarity of the work to existing work normally performed by City employees;
- 7) The existence of a prior employment relationship between the contractor and the City: prior position(s) held, period(s) of employment, duration, nature of work performed, and similarity to the services to be performed.
- 8) The similarity of the services to be performed to the services performed by the Contractor for non-City clients or customers as part of the contractor's business or professional practice;
- 9) The extent to which the contractor will be free to continue to provide these services to clients or customers other than the City during the term of the contract;
- 10) The location(s) of the work to be performed;
- 11) The extent to which the City will be providing work space, equipment, materials and staff support for the performance of the work and conversely, the extent to which the contractor will work from her/his own facilities, and provide her/his own equipment, materials and staff support;
- 12) The anticipated duration of the contract, including relationship to the completion of a specific project and length of a specified contract period, if applicable;
- 13) The basis for determining how many hours the contractor will work, and which hours the contractor will work;
- 14) The basis for determining the contractor's pay (e.g. flat fee due on completion of project, hourly rate based on a record of hours worked, or regular installments).

If you have any questions, please contact Christopher Owen, First Deputy, Department of Human Resources at 312-744-8395

Melissa Green

Melissa Green
5106 Baltimore Ave
Bethesda, MD 20816

September 26, 2017

Joe Deal
Chief of Staff
Mayor's Office
The City of Chicago
121 North LaSalle Street
Chicago, Illinois 60602

Dear Joe,

In Washington DC, experience, relationships, and access are critical. As a D.C. native and professional with 25 years of experience at the federal level, I have developed an effective combination of all three.

There are several important reasons why my personal, policy, political and professional experiences will provide the City of Chicago with an advocate that can create unique opportunities for the City.

First, as a rare second-generation native Washingtonian, I have been cultivating relationships with people in the federal government in both the executive and legislative branches my entire life. My network with the Washington political base is extensive and based not only on over two decades of working alongside these colleagues but also on friendships since childhood. These shared experiences are unique and the trust built over decades is not transferable, and I have proven I can put them to work for the City. These relationships span the political gamut - conservative and liberals, Republicans and Democrats so it gives me the ability to have access no matter which party is in power.

Second, I have worked in politics for over 25 years at the federal level. My political career began at age 19 in the famed "war room" for the Clinton-Gore campaign in 1992 where I worked for James Carville. Since then, I have had the privilege of serving in the White House for two Presidents - Presidents Clinton and Obama. Serving at this level, no matter the party of the President you serve, creates opportunities to build strong relationships with DC influencers of both parties and people who will likely one day have positions in the next administration.

Third, in my most recent White House role, I was appointed as Chief of Staff for the Office of Budget and Management (OMB). The OMB is an opaque place. It sits at the intersection of legislation, regulation, and money. The OMB has always been at the center of enduring, rather than ephemeral, government; they control a process - budget-making - that is fundamental to everything everyone does in Washington. As a result, the OMB possesses sanctions and access to information, which few other actors can match. As a former senior staffer to the OMB, I can provide the City connections to one of DC's biggest power centers and the one least easily accessed. The OMB's budget role means it can convince an agency to fund a particular program that might benefit a City and the agency's regulatory authority give it the power to revise an agency's interpretation of a rule that might be detrimental or helpful to the City.

In my four and a half years working for the City, I worked to craft a well-defined plan and proven strategy to extract whatever Chicago can get from each agency, rather than pressing Congress for money that isn't there. Securing money without earmarks requires a different approach that pushes for broad grant programs and funding criteria to make sure the City is well positioned to compete and win. So much of what we have accomplished for the City is because of my commitment to the City, my access to those in power here in Washington and my ability to navigate and influence conversations and processes that are complex and often take place behind the scenes.

I am confident that I can continue to deliver for the City in the same unique and important ways that I did the four and half years I was employed by the City and last year as a consultant, and I look forward to the opportunity to do so.

Sincerely,

Melissa Green



Melissa Green

Melissa Green
5106 Baltimore Ave
Bethesda, MD 20816
Phone: 202-494-9514
Email: green.m6d@hotmail.com

September 24, 2017

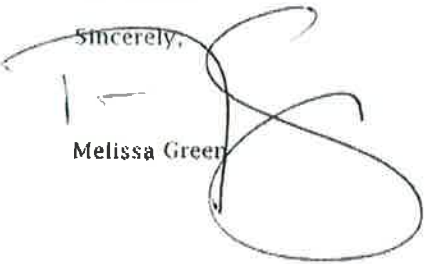
Ms. Yasmin Rivera
Office Administrator
The City of Chicago
121 North LaSalle Street
Room 406
Chicago, IL 60602

Dear Ms. Rivera:

This letter serves as confirmation of my monthly rate of \$8,500 per month for the duration of the contract extension agreement.

Sincerely,

Melissa Green





CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

7/31/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER BOGART & BROWNELL OF MD, INC. 7648 Standish Place Rockville MD 20855 INSURED MELISSA GREEN 5106 BALTIMORE AVENUE BETHESDA MD 20816	CONTACT NAME: Nicole Valerio PHONE (A/C, No, Ext): (301) 444-4500 E-MAIL ADDRESS: nicole@bogartandbrownell.com FAX (A/C, No): (301) 444-4510
	INSURER(S) AFFORDING COVERAGE NAIC # INSURER A: Erie Insurance Exchange 26271 INSURER B: Westchester Fire Insurance Co. INSURER C: INSURER D: INSURER E: INSURER F:

COVERAGES CERTIFICATE NUMBER: 2017-2018 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSO WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
X	COMMERCIAL GENERAL LIABILITY					EACH OCCURRENCE \$ 1,000,000
A	CLAIMS-MADE X OCCUR		Q30-1001106	6/10/2017	6/10/2018	DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000
						MED EXP (Any one person) \$ 5,000
						PERSONAL & ADV INJURY \$ 1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:					GENERAL AGGREGATE \$ 2,000,000
X	POLICY	PRO-JECT				PRODUCTS - COM/OP AGG \$ 2,000,000
	OTHER:					\$
A	AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	ANY AUTO ALL OWNED AUTOS	SCHEDULED AUTOS NON-OWNED AUTOS	Q30-1001106	6/10/2017	6/10/2018	BODILY INJURY (Per person) \$
X	HIRED AUTOS	X				BODILY INJURY (Per accident) \$
						PROPERTY DAMAGE (Per accident) \$
						\$
	UMBRELLA LIAB	OCCUR				EACH OCCURRENCE \$
	EXCESS LIAB	CLAIMS-MADE				AGGREGATE \$
	DED	RETENTION \$				\$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	Y/N	Q90-1000916	6/10/2017	6/10/2018	PER STATUTE OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	N/A				E.L. EACH ACCIDENT \$ 500,000
	If yes, describe under DESCRIPTION OF OPERATIONS below					E.L. DISEASE - EA EMPLOYEE \$ 500,000
						E.L. DISEASE - POLICY LIMIT \$ 500,000
B	Professional Liability		80NMDR112228332	6/10/2017	6/10/2018	\$1,000,000 each claim 1,000,000 Agg

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 The City of Chicago is listed as an additional insured on a primary, non-contributory basis. Waiver of subrogation in favor of City of Chicago, its employees, elected officials, agents or representatives. Thirty (30) days prior written notice to be given to the City in the event coverage is substantially changed, canceled or non-renewed.

CERTIFICATE HOLDER**CANCELLATION**

City of Chicago
 Department of Procurement Services
 City Hall, Room 806
 121 North LaSalle Street
 Chicago, IL 60602

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

John Seguin/RAD

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ACORD 25 (2014/01)

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INS025 (201401)

THIS ENDORSEMENT CHANGES THE POLICY, PLEASE READ IT CAREFULLY.

**ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS –
SCHEDULED PERSON OR ORGANIZATION**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

<p>Name of Additional Insured Person(s) or Organization(s): The City of Chicago is listed as an additional insured on a primary, non-contributory basis. Waiver of subrogation in favor of City of Chicago, its employees, elected officials, agents or representatives. Thirty (30) days prior written notice to be given to the City in the event coverage is substantially changed, canceled or non-renewed.</p>	<p>Location of Covered Operations: All Locations</p>
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(If no entry appears above, information required to complete this endorsement will be shown in the declarations as applicable to this endorsement).

- A. Section II – Who is an insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage" or "personal or advertising injury" caused in whole or in part, by:
 - 1. Your acts or omissions; or
 - 2. The acts or omissions of those acting on your behalf;

In the performance of your ongoing operations for the additional insured(s) at the location(s) designated above.

- B. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply: This insurance does not apply to "bodily injury" or "property damage" occurring after:
 - 1. All work, including materials, parts or equipment furnished in connection with such work, on the project (other than service maintenance or repairs) to be performed by or on behalf of the additional insured(s) at the location of the covered operations has been completed; or
 - 2. That portion of "your work" out of which the injury or damage arises has been put to its intended use by any person or organization other than another contractor or subcontractor engaged in performing operations for a principal as a part of the same project.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

**WAIVER OF TRANSFER OF RIGHTS OF RECOVERY
AGAINST OTHERS TO US**

This endorsement modifies insurance provided under the following:
COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name of Person or Organization:

Additional Insured: The City of Chicago is listed as an additional insured on a primary, non-contributory basis. Waiver of subrogation in favor of City of Chicago, its employees, elected officials, agents or representatives. Thirty (30) days prior written notice to be given to the City in the event coverage is substantially changed, canceled or non-renewed.

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to this endorsement.)

The TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US Condition (Section IV -COMMERCIAL GENERAL LIABILITY CONDITIONS) is amended by the addition of the following:

We waive any right of recovery we may have against the person or organization shown in the Schedule above because of payments we make for injury or damage arising out of your ongoing operations or "your work" done under a contract with that person or organization and included in the "products-completed operations hazard" This waiver applies only to the person or organization shown in the Schedule above.

WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.

Additional Insured:

The City of Chicago is listed as an additional insured on a primary, non-contributory basis. Waiver of subrogation in favor of City of Chicago, its employees, elected officials, agents or representatives. Thirty (30) days prior written notice to be given to the City in the event coverage is substantially changed, canceled or non-renewed.

(Please see the Miscellaneous Information page for Schedule.)

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Melissa Green: Federal Advocacy Consulting Services

Scope of Work

- Serve as the City's advocate and strategist on all matters before the White House, federal agencies and Congress.
- Spearhead efforts to obtain federal aid in competitive grants for the City.
- Respond to federal legislation to ensure the City's priorities are prominent.
- Identify federal funding, regulatory, and legislative opportunities for City departments and Sister Agencies.
- Work with the City and Sister Agencies to identify policy opportunities related to federal funding or legislation.
- Organize broad support for national policies important to Chicago, including but not limited to the campaign against illegal guns, opportunities for underserved populations, support for long-term infrastructure improvements, and efforts to promote sensible immigration reform.
- Serve as a liaison with other mayors, national think tanks, research institutions, non-profit institutions, universities, business groups, trade organizations and other Chicago/IL groups with a Washington, D.C. presence.
- Participate in Mayor's Washington, D.C. trips.
- In addition to and in furtherance of the work set forth above, the services will include:
 - Attending legislative and administrative hearings, meetings, or sessions as appropriate.
 - Obtaining and attending meetings with decision-makers on matters that impact the City.
 - Maintaining open lines of communication with the City and its legislative affairs team at all times.
 - Assisting in any federal government affairs-related tasks, programs, events, and projects, as needed.



Michael Rendina
Office of the Mayor


Maria Guerra

10-2-17
Date



CERTIFICATE OF FILING FOR

CITY OF CHICAGO ECONOMIC DISCLOSURE STATEMENT

EDS Number: 116078
Certificate Printed on: 08/04/2017

Date of This Filing:08/04/2017 12:25 PM
Original Filing Date:08/04/2017 12:25 PM

Disclosing Party: Melissa Green
Filed by: Melissa Green

Title:Principal

Matter: Federal Advocacy Consulting Services
Applicant: Melissa Green
Specification #: 225975
Contract #: 42881

The Economic Disclosure Statement referenced above has been electronically filed with the City. Please provide a copy of this Certificate of Filing to your city contact with other required documents pertaining to the Matter. For additional guidance as to when to provide this Certificate and other required documents, please follow instructions provided to you about the Matter or consult with your City contact.

A copy of the EDS may be viewed and printed by visiting <http://webapps1.cityofchicago.org/EDSWeb> and entering the EDS number into the EDS Search. Prior to contract award, the filing is accessible online only to the disclosing party and the City, but is still subject to the Illinois Freedom of Information Act. The filing is visible online to the public after contract award.



**DEPARTMENT OF PROCUREMENT SERVICES
CITY OF CHICAGO**

REQUEST FOR NO STATED GOALS

TO: Jamie L. Rhee
Chief Procurement Officer

FROM: Rony Mammoo
Procurement Specialist

DATE: JUL 14 2016

RE: Federal Advocacy Consulting Services
Specification Number: 225975

The Mayor's Office is requesting a sole source agreement be awarded for a one (1) year contract, plus one (1) year extension option request to Melissa Green. A request for no goals is being requested due to the specialized nature of these services.

As such, it is critical that the City have an effective advocate in Washington D.C., representing the City's interests at a high level. Ms. Green is uniquely qualified to perform these much needed services for the City. Ms. Green has worked as Chief of Staff to the Director of the White House Office of Management and Budget (the agency that decides which programs make it into the federal budget and how federal funds flow); has an extensive network of agency, congressional, and organizational contacts in Washington, D.C.; and has real knowledge of and history with the projects and issues that are priorities for the City.

The specifications and necessary requirements for performing the proposed contract make it impossible and economically unfeasible to utilize MBE's and WBE's, no MBE/WBE participation is requested. Direct MBE and/or WBE participation is neither practicable nor cost effective.

MINORITY AND WOMEN BUSINESS ENTERPRISES

It is the policy of the City of Chicago that local businesses certified as Minority Business Enterprises (MBE) and Women Business Enterprises (WBE) in accordance with Section 2-92-450 of the Municipal Code of Chicago and Regulations Governing Certification of Minority and Women-owned Business shall have the maximum opportunity to participate fully in the performance of all City contracts.

The Chief Procurement Officer has determined that the nature of the services to be provided under this Contract are such that neither direct nor indirect subcontracting opportunities will be practicable. Therefore, there will be no stated goals for MBE/WBE participation resulting from this Contract. This determination is being made pursuant to Section 2-92-450 of the Municipal Code of Chicago.



DEPARTMENT OF PROCUREMENT SERVICES
CITY OF CHICAGO

APPROVE: Monica Jimenez 7/19/2016
 DISAPPROVE: Deputy Procurement Officer Date

APPROVE: Jamie L. Rice 7/14/16
 DISAPPROVE: Chief Procurement Officer Date