

ORDINANCE

WHEREAS, the City of Chicago ("City") is a home rule unit of local government under the Illinois Constitution of 1970; and

WHEREAS, the City, through its Department of Housing, is charged with the mission of expanding housing access and choice; and

WHEREAS, the Department of Housing administers several corporate and federal funding programs, including allocation of tax credits, to finance development of multi-unit rental properties intended to be affordable to families at various income levels; and,

WHEREAS, the Department of Housing wishes to implement a comprehensive solution to automate the financing life cycle of residential development and asset management and serve as a repository of data and documents for affordable housing development, from application, to long-term monitoring and compliance, and through disposition, which will further the Department of Housing's mission; and

WHEREAS, the Department of Housing has identified a hosted application provided by ProLink Solutions, Inc. d/b/a ProLink Software Inc. ("Contractor") that offers the functions and features the Department of Housing seeks in connection with its goal towards automation of affordable housing development financing and asset management (the "Application"); and

WHEREAS, the Department of Housing seeks approval for award of a contract to the Contractor for the provision of services associated with the Application that include configuration, data migration, support, training and consulting, that will enable the Department of Housing's successful implementation and use of the Application (the "Services"); now therefore,

BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF CHICAGO:

SECTION 1. The above recitals are incorporated as set forth here.

SECTION 2. Subject to the availability of funds, the Commissioner of the Department of Housing, or his designee, is authorized to negotiate and enter into a contract with the Contractor to procure the Services for the purposes described herein, consistent with the Base Services Implementation terms set out in Exhibit A attached hereto.

SECTION 3. The Commissioner is further authorized to expend up to an additional sum of \$250,000, subject to the availability of funds, in the event the Commissioner determines in his reasonable discretion that Additional Services

and Deliverables, as described in and pursuant to the terms in Exhibit A, are necessary or appropriate for the successful implementation of the Application.

SECTION 4. Any contract entered into with the Contractor pursuant to this ordinance may contain such terms as determined by the Commissioner of the Department of Housing in his discretion to be reasonable and appropriate, which may include indemnification of the Contractor, but need not contain provisions imposed by city ordinances or State law, unless such provisions are mandatory and preempt the city's home rule authority.

SECTION 5. This ordinance takes effect immediately upon its passage and approval.

EXHIBIT "A"

Services and Pricing Schedule

EXHIBIT A



ATTACHMENT A Services and Pricing Schedule

1. DESCRIPTION OF BASE SERVICES WITH PRICING:

This Services and Pricing Schedule is Attachment A to the Hosted Technology Services Agreement ("Agreement") pursuant to which Seller grants to Purchaser a non-exclusive license for the Term of the Agreement, to use the Base Services described in this schedule, subject to payment of applicable Pricing also described in this schedule. All capitalized terms not otherwise defined in this schedule shall have the meanings described in the Agreement.

- ProLinkHFA - base system for use by an unlimited number of Purchaser's staff. License includes access to the below modules:
 - Origination, Development and Bond Allocation Module
 - Tax Credit Allocation Module
 - Asset Management / Program Compliance Module
 - Single Family Acq/Rehab, Loan Tracking
 - REO Management Module
 - Homelessness / Supportive Services Module
 - Single Family Non-Federal Grants Management Module
- Procore Construction Management Application
- Procore – for use by an unlimited number of users under one account, via a web-based enterprise software application. Procore provides a secure communication, document, and task management portal
- SmartDox functionality using Microsoft Word or Excel documents
- ProLinkHFA User Group Membership – entitles you to participate in collaborative working sessions with other ProLinkHFA customers and provide input on future ProLinkHFA Software Suite design and functionality enhancements.
- Nightly Backups – Our pricing includes delivery of a nightly backup of your ProLinkHFA data.

BASE SERVICES PRICING AND PAYMENT TERMS:

Fees due annually in advance; invoiced NET 30 days; subject to adjustment as described in Section 1.2 of the Agreement.

Base Services	Annual Cost	Payment Terms
License and Subscription	\$273,122	Due in full upon Agreement execution ("Effective Date").
License and Subscription	\$281,415**	Year 2 - due on the 1st anniversary of the Effective Date
License and Subscription	\$286,755**	Year 3 - due on the 2nd anniversary of the Effective Date
License and Subscription	\$298,448**	Year 4 - due on the 3rd anniversary of the Effective Date
License and Subscription	307,401**	Year 5 - due on the 4th anniversary of the Effective Date
TOTAL	\$1,447,141	

****1.2.1** All pricing and fees set forth on the Services and Pricing Schedule shall be increased annually commencing on the one-year anniversary date of the Effective Date by the greater of (i) three percent (3%) or (ii) the percentage increase in the Index since the Effective Date (or the immediately preceding anniversary of the Effective Date, as the case may be). The "Index" means the Consumer Price Index – All Urban Consumers, All Items, U.S. City Average, not seasonally adjusted, 1982-84 = 100 reference base, as published by the United States Bureau of Labor Statistics.

2. BASE SERVICES IMPLEMENTATION - ("Base Services Implementation"):

A maximum of 2,200 hours shall be spent by Seller on the Base Product Implementation summarized below. See Section 3 below for a description of how Purchaser Change Requests to the Base Services Implementation are processed.

- ❖ **ProLink Project Management Services** - Includes periodic project status and steering committee updates managed via a Procorem Project Management WorkCenter (available to all stakeholders)
- ❖ **Virtual Kick-Off Meeting**
- ❖ **Client Environment Setup**
- ❖ **Business Process Review** - ProLink will work with Client to identify recurring work functions performed by Client staff, whether recurring on a time basis or on a deal lifecycle basis for each of the major process areas: Asset Management, Tax Credit, Development and Compliance. This will include:
 - ✓ Review and gain understanding of Client's products, services, and organizational structure via interviews with Client stakeholders
 - ✓ Present generic ProLinkHFA and full ProLink Software Suite process flows
 - ✓ Create and present ProLink process flows representing Clients' processes
 - ✓ Identify gaps between the above referenced future state flows and Client's current processes, and identify potential solutions to address these gaps
 - ✓ Document any recommended system configurations as identified during process discovery
- ❖ **SmartDox Template Mapping:** Includes Developers Application/Proforma mapping and validation (300 hours)
- ❖ **Data Migration** - Data mapping and transformation of Purchaser's existing LIHTC allocation data into ProLink's database. NOTE: At this time, the below Implementation Pricing excludes migration of multifamily loan data.*
- ❖ **Virtual Training:** Base Services training for Purchaser's staff so they can utilize the software:
 - ✓ Procorem and ProLink Software Suite Intro – 4 hours
 - ✓ SmartDox Mapping – 2 hours
 - ✓ Asset Management – 6 hours
 - ✓ Development (DEV) Module – 4 hours
 - ✓ Tax Credit Allocation (TCA) Module – 8 hours
 - ✓ BudgetPro Module – 2 hours
 - ✓ Compliance – 4 hours
 - ✓ Intro Data Views, Reports, Dashboard – 3 hours
 - ✓ User Security & System Admin – 3 hours

- ✓ Online Open Mic Meetings (Reinforcement) - 4 Hours
- *In person training is available at additional cost.

- ❖ Base Services Implementation Acceptance Period – the expiration of the “Acceptance Period” must occur within 12 months from the Effective Date of the Agreement. Refer to Section 6 of the Agreement for details.
 - ✓ Process Maps Acceptance
 - ✓ Data Object Validation
 - ✓ System Configuration, Reports & Data-Views Validation
 - ✓ SmartDox Template Validation
 - ✓ User Security Roles Acceptance
- ❖ Project Close Out (completion of Base Product Implementation)

BASE SERVICES IMPLEMENTATION FEE: Invoiced with NET 30 day terms, *subject to adjustment as described in Section 1.2 of the Agreement.*

Base Services	Cost	Payment Terms
Implementation Fees*	\$221,835	50% due at Contract signing; 50% due upon the expiration of the Acceptance Period.

3. ADDITIONAL SERVICES OR DELIVERABLES (“Additional Deliverables”):

Additional Services and Deliverables that you may request or require in connection with the above described Base Services Implementation or thereafter, are listed below. Additional Deliverables are documented and approved through a Scope Change Request (“SCR”) process. The seller will provide a SCR that describes the scope, design and effort required to complete and implement the task(s) and Deliverable(s), with each approved SCR being considered an Addendum to this Agreement. Some Deliverables will require ongoing annual Maintenance fees. CR’s are invoiced and payable NET 30 days, based on the most current time and material “ProLink Professional Services Rates”. Reimbursement of Travel and related expenses will also apply to any CR’s requiring travel by Seller’s staff.

- **Project Management Consulting Services** – The successful implementation of your new software requires the Purchaser have a dedicated person to manage and ensure the completion of tasks so your implementation deadline can be achieved. ProLink offers dedicated Project Management Consulting Services for clients that don’t have their own dedicated staff to fulfill this essential role.
- **Post implementation training** – 16 hours of training. This training is highly recommended for Purchaser’s to ensure the successful adoption and acceptance of their new software by all Users, and to ensure the best and highest use of the Services purchased. Training is conducted virtually or provided in ProLink Solutions’ corporate offices, located in Englewood, Colorado.
- **Additional or customized “Help”, training materials or training sessions**
- **Additional SmartDox template mapping**
- **SQL Server Reporting Services**
- **Additional business process mapping, design, or business process review**

- Additional system configuration (involving such tasks as creating new data views or custom reports; adding feature enhancements, or new categories; creating checklists or task templates)

IMPLEMENTATION PRICING AND PAYMENT TERMS: *Invoiced at NET 30 day terms, subject to adjustment as described in Section 1.2 of the Agreement.*

Optional Deliverables	Cost	Payment Terms
Project Manager Working for the Purchaser	\$200/hour	20% discount for a minimum 6 month contract for services.
Post Implementation Training	\$220/hour	50% due in advance; 50% due upon completion of training;
Integration with other software	\$265/hour	Billed Monthly

 PROFESSIONAL SERVICES RATE CARD	
Job Classifications	Hourly
Senior Development Engineer	\$265
Development Engineer	\$235
Managers: Project / Product / Customer Adoption	\$235
Principal Business Consultant / Network Engineer / Product Trainers	\$220
Business Analyst / Quality - Assurance Analyst	\$200
2023 Rates - subject to cumulative annual increases of up to 3% per year. NOTE: These rates change on the 1st of each year.	



OFFICE OF THE MAYOR
CITY OF CHICAGO

BRANDON JOHNSON
MAYOR

November 15, 2023

TO THE HONORABLE, THE CITY COUNCIL
OF THE CITY OF CHICAGO

Ladies and Gentlemen:

At the request of the Commissioner of Housing, I transmit herewith an ordinance authorizing the execution of a license and subscription services agreement with ProLink Solutions, Inc.

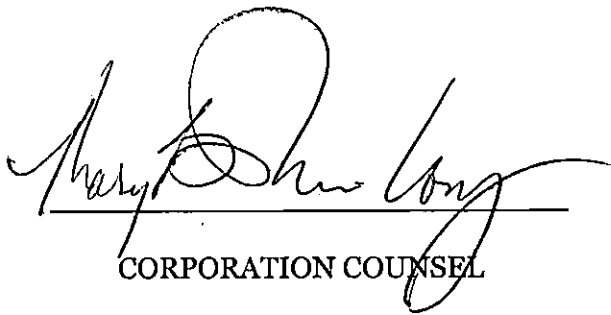
Your favorable consideration of this ordinance will be appreciated.

Very truly yours,

A handwritten signature in black ink, appearing to be "Brandon Johnson", written over the word "Mayor".

Mayor

APPROVED


CORPORATION COUNSEL

DATED: December 20, 2023

APPROVED


MAYOR

DATED: December 20, 2023