
Notice of Intent to Certify Sole Source

To: Interested Parties

From: Craig P. Orgeron, Ph.D.

CC: ITS Project Number 42432

Date: May 10, 2016

Re: Sole Source Certification Number 3906 for the integrated solution of CS Gold and Micros Symphony for the University of Mississippi (UM)

Contact Name: Patti Irgens

Contact Phone Number: 601-432-8223

Contact E-mail Address: Patti.Irgens@its.ms.gov

Sole Source Certification Award Details

Regarding Information Technology Services (ITS) Sole Source Certification Number 3906 for the integrated solution of CS Gold and Micros Symphony for the University of Mississippi (UM), please be advised that ITS intends to award the solution to The CBORD Group, Inc., as the sole source provider of the integrated solution of CS Gold and Micros Symphony through July 31, 2018, in an amount not to exceed \$254,808.00. For an explanation regarding Mississippi state law, policy and procedures for sole source procurements, refer to Attachment C: Sole Source Procurement Overview.

Sole Source Criteria

1. The product or services being purchased must perform a function for which no other product or source of services exist:

UM has CBORD CS Gold as their card system for ID Cards that controls building access, cameras and POS systems in the Aramark food locations across the campus. Micros Symphony is the new software platform that UM will be upgrading to. Symphony POS system integrates with CBORD CS Gold the ID card system at UM and allows UM the ability to take credit card, cash, campus card and debit plan transactions. The solution also tracks all financial information for audit purposes. UM can use meal plans, point plans (flex and Ole Miss Express) debit plans as well as debit and credit card processing with the Micros interface. UM systems staff and food service vendor staff have been certified with Micros training.

2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services:

Micros Symphony integrates with the CBORD CS Gold ID card system. The CBORD Group, Inc is the sole provider of Micros Symphony software and owns the source code for the integration between the two platforms.

3. The product or services must be available only from the manufacturer and not through resellers who could submit competitive pricing for the product or services:

The CBORD Group, Inc. has full rights to license the software package Micros Symphony. The CBORD Group, Inc is the sole provider of Micros Symphony software and owns the source code for the integration between the two platforms. The vendor's sole source certification letter is included as Attachment B.

Schedule

Task	Date
First Advertisement Date	05/10/2016
Second Advertisement Date	05/17/2016
Response Deadline From Objectors	05/26/16, at 3:00 P.M. Central Time
Notice of Award/No Award Posted	Not before 05/27/16

Project Details

UM has had CBORD since 1986 and Micros since 2007, and has made a business decision to continue using this solution, including support and the supporting hardware. This Intent to Certify is for a software upgrade that will improve point of sale security and transactions across campus, as well as provide better reporting information. No additional hardware will be required for this upgrade.

UM has 66 locations that utilize the hardware and software associated with CBORD and Micros. Micros Symphony offers advanced reporting to have information to make informed operational decisions for labor, food cost, inventory, and menu planning to better serve UM students, staff, faculty, and visitors. The original purchase was approved and ordered by purchase order 4500134393 issued June 19, 2007, as a sole source purchase because of the interface with CBORD.

UM has invested in hardware as new venues across campus are added, with more than 66 locations currently operational. With the Symphony upgrade UM will not have to purchase different hardware as Symphony is a software upgrade.

Submission Instructions and Format of Response from Objecting Parties

Interested parties who have reason to believe that the Micros Symphony software licenses and maintenance should not be certified as a sole source should provide information in the following format for the state to use in determining whether or not to proceed with awarding the Sole Source contract to The CBORD Group, Inc.

- 1.1 Interested Party Information
 - 1.1.1 Contact Name, Phone Number and email address
 - 1.1.2 Company Website URL, if applicable
- 1.2 Objection to Sole Source Certification

- 1.2.1 Interested parties must present specific objections to the Sole Source certification using the criteria listed above.
- 1.2.2 A statement regarding the Interested Party's capabilities as related to this Sole Source Certification Request.
- 1.3 Comments will be accepted at any time prior to Tuesday, May 26, 2016, at 3:00 p.m. (Central Time) to Patti Irgens at Patti.Irgens@its.ms.gov or at the Mississippi Department of Information Technology Services, 3771 Eastwood Drive, Jackson, Mississippi 39211. Responses may be delivered by hand, via regular mail, overnight delivery, e-mail or by fax. Fax number is (601) 713-6380. ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF RESPONSES. It is solely the responsibility of the Interested Parties that responses reach ITS on time. Interested Parties may contact Jill Chastant to verify the receipt of their Responses. Responses received after the deadline will be rejected.
- 1.4 Interested Party responses should include the following information:

**SUBMITTED IN RESPONSE TO
Sole Source Certification No. 3906-42432
Accepted until May 26, 2016 @ 3:00 p.m.,
ATTENTION: Patti Irgens**

If you have any questions concerning the information above or if we can be of further assistance, please contact Patti Irgens at 601-432-8223 or via email at Patti.Irgens@its.ms.gov.

- Attachment A: Customer Sole Source Certification Request
- Attachment B: Vendor Correspondence
- Attachment C: Sole Source Procurement Overview



3771 Eastwood Drive
 Jackson, Mississippi 39211
 Phone 601-432-8000 Fax 601-713-6380

Sole Source Certification Request

Project Title: Symphony			Stimulus (ARRA) Funds? Yes No X	
Customer Contact Information				
Agency/Public University: Kathy Tidwell Contractual Services 154 Paul B. Johnson Commons University, MS 38677 Address:			Contact Person: Kathy Tidwell Phone: 662-915-5345 Fax: 662-915-5784 Email Address: ktidwell@olemiss.edu	
MAGIC Customer Number (only required from state agencies):			Division/Dept: Handmail: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Project Summary Narrative Description of Project (include details of original acquisition if applicable): Platform change to micros symphony. This is to improve Point of sale security and transactions across campus				
ITS Acquisition Approval (CP-1) should be effective through this date (Please allow time for all vendor invoices to be paid):				
Cost Estimates Fiscal Year	Initial Costs	Ongoing Costs	Time Constraints Item Needed by: 9/24/2015 Funds Expire: 6/30/2016	Anticipated Lifecycle of Products/System (i.e. estimated years of effective use): 2
	188312	66496	Discuss Funding (e.g. how much of needed funding is definite; total project budget; any matching or other non state funds) Have money in budget this year	
Total				
Acquisition Details				
Items Requested	Quantity	Description	Building Location(s)	
1	1	MICROS symphony Version 1.X base system license		
2	67	MICROS symphony point of service client (version 1.x or 2.x)		
3	1	MICROS symphony version 1.x installation media		
4	67	MICROS symphony credit card setup (per workstation).		
5	67	MICROS symphony help desk terminal (51-100 workstations)		
6	1	MICROS symphony credit card support		
7	67	MICROS symphony software enhancement license (sel), per terminal		
8	67	Interface conversion: MICROS 9700/CS Gold to MICROS symphony/CS Gold		
9	1	MICROS symphony System Administrator 1 for CS Gold		
10	1	MICROS symphony v1 advanced system administrator course		
11	1	Agilence/morcso symphony 1.x interface license		
12	1	Agilence/micros symphony 1.x interface help desk		
13	1	Agilence videoanalysis software-installation (travel and living expenses billed at cost)		
14	1	Systems implementation (travel and living costs included)		
15	1	Project management (travel and living costs included)		
16	1	Cbord database services for New MICROS symphony		
Describe platform & infrastructure (connectivity; software/hardware platforms; utilization of State Data Center resources: mainframe, eGovernment portal, payment engine, document management, hosting). For equipment or hosting outside the State Data Center, attach justification: MIRCOS symphony POS product is a register/software product used for all food financial transactions at the UM. All MICROS registers are connected to the campus IT network and are PCI compliant.				

Attachment A

Progress to Date: What has been done related to this project, including any communication with ITS staff (data/voice/procurement/other)?
All registers acquired and hardware is operational.

Sole Source Certification Note: Certification must be renewed for each revision or continuation of previous Sole Source Approvals.

Specific business requirements to be met by the requested products or services: This POS system will allow us the ability to take credit card transactions as well as cash and campus cards for out debit plans and to track all financials for audit purposes.

Explain why these products or services are the only ones that can meet your needs (include unique features/special functionality): Micros owns the source code of their register products. Due to our existing micros systems and hardware in place micros was the only provider and Cbord CS Gold is the only system integration provider.

Explain why the source is the only entity that can provide the products or services (include other products/vendors researched or evaluated): Micros owns the source code of their register products. Due to our existing micros systems and hardware in place micros was the only provider and Cbord CS Gold is the only system integration provider.

Explain why the amount to be expended for the services is reasonable: It is less expensive to change to the software than to change out the entire Point of Sale system.

Explain what your agency did to obtain the best possible price for the services: We negotiated with the vendor: MICROS and Cbord to get the best price.

Vendor's Certification of Sole Source attached: Yes No Vendor's proposal attached: Yes No

MAGIC Vendor Code(s) Vendor must be in MAGIC before a CP-1 can be issued.
 Place Order To The Cbord Group, INC Remit To The Cbord Group, INC
 Vendor Name: 61 Brown Road Vendor Name: 61 Brown Road
 Vendor Address: Ithaca, NY 14850 Vendor Address: Ithaca, NY 14850

By my signature, I certify that, to the best of my professional knowledge: the requested product or services are a sole source as outlined in the ITS Procurement Handbook, Rule 207.2:013-030 Procurement Types: Sole Source, and as outlined in Mississippi Code annotated Section 31-7-13. In addition, I acknowledge that there is a charge for ITS procurement services associated with this request which will be billed to the requestor by ITS and that my agency/public university is responsible for these charges/costs.

Kethyn F. Gates, CIO
 Name (Agency Head or Public University CIO)/Title


 Signature
 10-1-2015
 Date



World Headquarters
61 Brown Road, Ithaca, NY 14850
www.cbord.com
607.257.2410

July 20, 2015

Ms. Kathy Tidwell
University of Mississippi
ID Center
Paul B. Johnson Commons
University, MS 38677

Ms. Tidwell:

This letter is to confirm that the integrated solution of CS Gold application software with the Micros Symphony POS Hardware and CS Gold Micros interface software is only available from The CBORD Group, Inc.

CS Gold and the unique Micros Symphony Interface are only developed, tested and implemented by The CBORD Group Inc. The CBORD Group Inc. owns all source code and licensing rights to its licensed software. Certified CBORD Systems Engineers are necessary for upgrades of the Micros software versions integrated with CS Gold.

I hope this clarifies the unique position of The CBORD Group, Inc. as the sole source capable of delivering this comprehensive solution.

Sincerely,

A handwritten signature in cursive script, appearing to read "Mark Jaimes".

The CBORD Group, Inc.
Mark Jaimes
Director of Sales
mfj@cbord.com

Comprehensive Solutions. Innovative Products. Dedicated Service.

Attachment C: Sole Source Procurement Overview

The acquisition of information technology for all state agencies and institutions of higher learning (IHLs) is within the scope of the ITS law, found in Mississippi Code Section 25-53-1, et seq., and the policies and procedures established in accordance with this statute, found in the ITS Procurement Handbook posted on the ITS website (www.its.ms.gov).

ITS enabling legislation requires that information technology hardware, software and services be acquired in a manner that insures the maximum of competition among all manufacturers and suppliers of such equipment and services. Accordingly, ITS promotes full and open competition through the issuance of open specifications and the objective evaluation of Interested Party proposals to determine the lowest and best offering to meet an agency's or public university's business requirements. True competition protects the integrity and credibility of purchasing in the public sector and is essential in providing best value and adequate contractual protection for the purchasing entity. In certain limited situations, information technology acquisitions may be sole-sourced.

ITS utilizes the provisions of Public Purchasing Law for Sole Source and Emergency procurements of information technology. Mississippi Public Purchasing Law (Mississippi Code Section 31-7-13) specifies that noncompetitive items available from one source only be exempted from bid requirements (sole-sourced). ITS statute, in Section 25-53-5 (p), permits ITS to utilize provisions in Public Purchasing Law or regulations, when applicable.

Per Public Purchasing law, acquisitions must meet the following criteria to be authorized as sole source:

1. The product or services being purchased must perform a function for which no other product or source of services exists,
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services, AND
3. The product or services must be available only from the manufacturer and NOT through resellers who could submit competitive pricing for the product or services. The vendor's correspondence regarding this criterion for this project is included as Attachment B.

By policy as documented in the ITS Procurement Handbook, acquisitions of IT services must include the following information to be authorized as sole source:

1. An explanation about why the amount to be expended is reasonable, and
2. An explanation regarding the efforts by the purchaser to obtain the best possible price.

For state agencies, approval of all technology purchases with a lifecycle cost of \$5,000 or less, including sole source purchases, has been delegated to the agency. The ITS Procurement Limits Policies for Agencies (a section in the ITS Procurement Handbook) require a minimum of two competitive written bids or proposals for technology purchases with a lifecycle cost over \$5,000 but not over \$50,000 (not over \$25,000 for projects funded by the American Recovery and Reinvestment Act). Since, for single source items, the procuring agency will be unable to obtain two written bids, ITS must certify all sole source acquisitions of information technology with a lifecycle cost greater than \$5,000.

Institutions of Higher Learning (IHLs) or public universities have been delegated the authority to certify sole source procurements up to \$250,000 lifecycle cost under the ITS Procurement Limits Policies for IHLs (a section in the ITS Procurement Handbook). For the certification of sole source procurements delegated to the CIOs at public universities, the public university must follow ITS' Sole Source Procedure, including advertisement of the intent to award as sole source. Institutions certifying a sole source purchase must ensure the criteria listed above are met and documented in writing by the institution and the Interested Party prior to certifying a product or service as sole source. Sole source documentation must be reviewed and approved by the IHL's CIO for any sole-source certification above \$5,000. All sole source documentation should be retained in the public university's procurement file. Sole source requests above \$250,000 lifecycle cost require ITS approval.

Attachment C: Sole Source Procurement Overview

Other than the delegations outlined above, all sole source technology procurements must be certified by ITS. The customer's Sole Source Certification Request for this project is included as Attachment A.

ITS thoroughly reviews Sole Source Certification Requests, determining if competing products and/or services exist. If so, ITS conducts a competitive procurement. If ITS' review confirms the sole source, then a Sole Source advertisement is issued, giving other Interested Parties an opportunity to identify competing products and/or services. Based upon the results of the Sole Source advertisement, ITS will either certify the request as a sole source or conduct a competitive procurement.