

Office of the Illinois State Treasurer  
Michael Frerichs

Sole Source Procurement Notice

Management System and Technical Support for the Division of  
Unclaimed Property

June 4, 2015

**I. Introduction:**

The Office of the Illinois State Treasurer is issuing this Sole Source Procurement Notice pursuant to Section 1400.2025 of the Treasurer's Procurement Rules, 44 ILAC 1400.2025(e).

The contract for the Treasurer's current management system and technical support for the Division of Unclaimed Property, for the management and operation of the Illinois Unclaimed Property program pursuant to the Illinois Uniform Disposition of Unclaimed Property Act ("Act"), 765 ILCS 1025, will expire on June 30, 2015. This contract was initially entered into on July 1, 2005 with Wagers Associates, Inc. Pursuant to Illinois procurement rules, the current contract cannot be extended beyond ten years.

The rights to the Wagers Associates, Inc. contract are now owned by Xerox State & Local Solutions, Inc.

On March 30, 2015, the Treasurer issued an initial Request for Proposals ("RFP") with responses due on April 27, 2015 for a vendor to contract for a new unclaimed property system and technical support. However, only one response was filed by the deadline.

On May 22, 2015, the Treasurer issued a Request for New Proposals because the Treasurer's Procurement Rules provide that if "only one responsive bid, proposal, or response is received... new bids, proposals or responses may be solicited" (44 ILAC 1400.2505(e)). Responses to this RFNP are due on June 12, 2015.

**II. Chief Procurement Officer**

The Chief Procurement Office who will perform this Sole Source Procurement is:

Mr. Jim Underwood  
Chief Procurement Officer  
Illinois State Treasurer's Office  
400 West Monroe, Suite 401

Springfield, Illinois 62704  
Phone: (217) 782-1708  
E-mail Address: [junderwood@illinoistreasurer.gov](mailto:junderwood@illinoistreasurer.gov)

**III. Name of Proposed Sole Source Vendor**

Xerox State & Local Solutions, Inc.  
100 Hancock Street  
Quincy, Massachusetts 02171

**IV. Brief Description of What Vendor Will Do or Provide**

The proposed Vendor will provide the management system and technical support for the Division of Unclaimed Property, for the management and operation of the Illinois Unclaimed Property program pursuant to the Illinois Uniform Disposition of Unclaimed Property Act (“Act”), 765 ILCS 1025. Specifically, the proposed Vendor will continue to license and support the Treasurer’s current unclaimed property management system, referred to as UPS2000.

The Vendor will also provide support for a transition to whichever system is ultimately selected by the Treasurer to replace the UPS2000.

**V. Contract Price**

The Treasurer intends to negotiate to obtain the most favorable price, delivery and other terms and conditions available for the State. The FY15 maintenance agreement with Wagers Associates, Inc. (Xerox State & Local Solutions, Inc.) was for \$87,500.00. The Chief Procurement Officer will post an additional Notice when the final contract with Xerox State & Local Solutions, Inc. is negotiated.

**VI. Reason Why Xerox State & Local Solutions, Inc. was Determined to be the Sole Economically Feasible Source**

Xerox State & Local Solutions, Inc. owns the contract rights to the Treasurer’s existing unclaimed property system. Therefore, this Vendor is the only potential bidder or offeror authorized to provide these services. It would be impossible to select a new vendor to provide services beginning on July 1, 2015 and continuing during the period of transition to a new unclaimed property system.