
From: Diaz-Greco, Gilma M. (COE)
Sent: Thursday, July 24, 2014 9:36 AM
To: Sanchez, Rodzandra (COE)
Cc: Crowley, Chris (ITD); Centorino, Joseph (COE)
Subject: FW: Chris Crowley, ITD- Ethics Opinion (Travel Expenses) INQ 14-179

INQ 14-179

From: Diaz-Greco, Gilma M. (COE)
Sent: Thursday, July 24, 2014 9:35 AM
To: Crowley, Chris (ITD)
Subject: Chris Crowley, ITD- Ethics Opinion (Travel Expenses)

Dear Mr. Crowley,

You have inquired whether an ITD employee may accept a free registration fee valued at \$1695 to attend Infor's annual Inforum Conference (Inforum) which is taking place in New Orleans. The County would pay approximately \$ 900 to cover the hotel, airfare, and meals not covered by the registration fee.

As background, Infor is a County vendor which provides the County with the Infor EAM application for enterprise asset management (through a licensing agreement) used to inventory several categories of County assets. The employee that would be traveling to the conference is the lead technical support for Infor EAM at ITD. At the conference she will attend technical seminars to improve her understanding of the Infor EAM application as tailored to public sector customers. The training she would attend would be valuable for ITD. Infor is providing the County with a complimentary registration because the County has accumulated sufficient points through Infor's customer points program to be granted a free registration. Infor's points program allows customers to obtain points for, among other things, providing references on Infor's products. The County has responded to requests for references for Infor's products and accumulated enough points under Infor's point system to be awarded a free registration to the conference.

County employees may not accept travel expenses from County vendors. *See* Miami-Dade County Ethics Code at Sec. 2-11.1 (w). In this case, the County is paying part of the travel expenses, but the registration fee would be covered by Infor. Travel expenses include, but are not limited to, transportation, lodging, meals, registration fees and incidentals. *Id.* Therefore, the registration fee would be a travel expense and accepting the fee would be prohibited under Sec. 2-11.1 (w). Only the Board of County Commissioners (BCC) may waive this prohibition by majority vote.

If no waiver is sought from the BCC, then the ITD employee may still attend this conference under one of the following circumstances:

- 1) The County pays for her transportation and expenses including the registration fee.
- 2) The County pays for her transportation and expenses and the County receives reimbursement from Infor.
- 3) The ITD employee personally pays for her transportation and expenses including the registration fee.

We also advise that government, unlike private industry, cannot accept a benefit such as a complimentary conference registration fee where it is offered because of a favorable reference it may have provided. This would be too close to a prohibited *quid pro quo* arrangement. Any reference provided by the County should be an aspect of its public function and should not be based on any expected benefit such as a complimentary registration fee.

Please contact us if you have any further questions.

Best regards,

Gilma (Mimi) Diaz-Greco
Staff Attorney



Miami-Dade Commission on Ethics and Public Trust
19 W. Flagler Street, Suite 820
Miami, FL 33130
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From: Crowley, Chris (ITD)
Sent: Wednesday, July 16, 2014 2:48 PM
To: Diaz-Greco, Gilma M. (COE)
Subject: RE: Inforum Conference

Ms. Diaz-Greco,

Please see my responses below.

Thanks,

-chris

Christopher Crowley, Systems Support Manager
Information Technology Department
305-275-7990
miamidade.gov

"Delivering Excellence Every Day"

From: Diaz-Greco, Gilma M. (COE)
Sent: Wednesday, July 16, 2014 2:39 PM
To: Crowley, Chris (ITD)
Subject: RE: Inforum Conference

Mr. Crowley,
Some additional questions:

- 1- Who would pay for the travel expenses to New Orleans? Flight, hotel, etc?
 - The County will pay all travel expenses. Only the registration fee is being offered as compensation.
- 2- Does the County contract with Infor include a provision for employee training?
 - Yes, the County may procure employee training via the contract. We have procured training in the past and will continue to do so in the future.
- 3- You indicate the County is a customer. Infor is therefore a County vendor?
 - Yes, Infor is a County vendor. The contract in-place is: SS8667-1/18-1.

Best regards,

Gilma (Mimi) Diaz-Greco
Staff Attorney

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From: Crowley, Chris (ITD)
Sent: Wednesday, July 16, 2014 2:00 PM
To: Diaz-Greco, Gilma M. (COE)
Cc: Centorino, Joseph (COE); Manduley, Julian R. (ITD); Fuentes, Mary (ITD)
Subject: RE: Inforum Conference

Ms. Diaz-Greco,

My responses to your questions are below:

- 1- What is the Inforum Conference?
 - The Inforum Conference is the annual customer and partner conference of Infor applications. Miami-Dade County has licensed the Infor EAM application for enterprise asset management from Infor, Inc.
- 2- Where is it taking place? Costs?
 - The conference is taking place in New Orleans.
 - The registration fee is: \$1,695. Other travel expenses are estimated to be \$900.
- 3- What is the official purpose that would be served by attending this conference?
 - The employee traveling to the conference is the lead technical support for the Infor EAM in the Information Technology Department. She is one of two people who support the application infrastructure for all County departments.
 - The employee will attend technical seminars to improve her understanding of the Infor EAM application as tailored to public sector customers.
 - Infor will also present their future roadmap for the Infor EAM application. There will be an opportunity for the County employee to provide direct input with the Infor application development team who will also be attending the conference.
- 4- How does the Inforum point system work and how are points accrued? (What has to be done to accrue points?)
 - The County does not know how the point system works. We were informed we had accrued points after the County was part of two reference calls.
- 5- Are they accrued by the County or by individuals?
 - The points are for the County as a customer. They are not directed towards a specific County employee.

Please feel free to contact me if you have additional questions.

Thanks,

-chris

Christopher Crowley, Systems Support Manager
Information Technology Department
305-275-7990
miamidade.gov

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From: Manduley, Julian R. (ITD)
Sent: Wednesday, July 16, 2014 11:32 AM
To: Crowley, Chris (ITD); Fuentes, Mary (ITD)
Subject: FW: Inforum Conference

Please provide a direct response to the email below from the COE.

Julian R. Manduley, C.P.M.
IT Contracts & Procurement Manager
Miami-Dade County Information Technology Department
5680 S.W. 87th Avenue
Miami, FL 33173
Tel: 305.596.8610
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jmandul@miamidade.gov

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From: Diaz-Greco, Gilma M. (COE)
Sent: Wednesday, July 16, 2014 11:20 AM
To: Manduley, Julian R. (ITD)
Cc: Centorino, Joseph (COE)
Subject: RE: Inforum Conference

Mr. Manduley,

I am reviewing you request for opinion and have several questions.

- 1- What is the Inforum Conference?
- 2- Where is it taking place? Costs?
- 3- What is the official purpose that would be served by attending this conference?
- 4- How does the Inforum point system work and how are points accrued? (What has to be done to accrue points?)
- 5- Are they accrued by the County or by individuals?

I appreciate your response and I will contact you via email or phone if I have any additional questions.

Best regards,

Gilma (Mimi) Diaz-Greco
Staff Attorney

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From: Manduley, Julian R. (ITD)
Sent: Friday, July 11, 2014 2:38 PM
To: Diaz-Greco, Gilma M. (COE)
Cc: Fuentes, Mary (ITD); Crowley, Chris (ITD)
Subject: FW: Inforum Conference

Hi Gilma:

I was informed that Victoria Frigo has retired. ITD is requesting your review and opinion if it is permissible to send an ITD employee to the Inforum Conference with points earned. See Mari Malcom's email below.

Thank you.

Julian R. Manduley, C.P.M.
IT Contracts & Procurement Manager
Miami-Dade County Information Technology Department
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From: Manduley, Julian R. (ITD)
Sent: Monday, July 07, 2014 5:34 PM
To: 'Frigo, Victoria (COE)'
Subject: FW: Inforum Conference

Hi Victoria:

Please see the trail of emails below. ITD is seeking your opinion if it is permissible to send and ITD employee to the Inforum Conference with points earned.

Please advise.

Julian R. Manduley, C.P.M.
IT Contracts & Procurement Manager
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From: Poster-Ellis, Dale (ITD)
Sent: Monday, June 30, 2014 11:51 AM
To: Manduley, Julian R. (ITD)
Subject: FW: Inforum Conference

Please look into this under existing contract to determine if covered and advise. Thanks.

From: Malcolm, Mari (ITD)
Sent: Friday, June 27, 2014 9:52 AM
To: Poster-Ellis, Dale (ITD)
Subject: Inforum Conference

Dale,

Mary Fuentes wanted to know if we could use points earned w/ Infor to cover Pauline's registration at the Inforum Users Conference in September. Is this something we can do or would we need to reach out to the Ethics Commission? Below are links on how the points system works w/ Infor. If we could use the points, it would save the County \$1695 in registration fees.

Mari

-----Original Message-----

From: Carlos Sio [<mailto:Carlos.Sio@infor.com>]
Sent: Friday, June 27, 2014 7:38 AM
To: Fuentes, Mary (ITD)
Cc: Crowley, Chris (ITD); Malcolm, Mari (ITD); Jennifer Doyon
Subject: RE: Reference Program

Hi Mary,

Please visit the following web page which is current and is the best place to find all of the information on Infor Reference Program: www.infor.com/irp

This link shows the various activities that earn points:

http://go.infor.com/irp/participation_options/

This link shows what customers can redeem the points for:

<http://go.infor.com/irp/rewards/>

Should have any questions please contact my colleague Jennifer Doyon, copied on this email and at from the Reference Program team so she can answer any questions directly. Jennifer may be reached at: +1 (207) 703-0580

Kind regards,
Carlos

Carlos Sio | Sr. Account Executive
Public Sector
mobile: +561 275 4332
carlos.sio@infor.com | <http://www.infor.com>

-----Original Message-----

From: Fuentes, Mary (ITD) [<mailto:MMH@miamidade.gov>]
Sent: Thursday, June 26, 2014 4:13 PM
To: Carlos Sio
Cc: Crowley, Chris (ITD); Malcolm, Mari (ITD)
Subject: FW: Reference Credits - Inforum

Carlos, can you send us any additional information on this so that we may forward it to the Ethics Commission for approval?

A description of the program and how it fits into our agreement would be beneficial.

Thank you so much.

Mary M. Fuentes
Information Technology Department
Miami-Dade County
5680 SW 87th Avenue, Miami, FL 33173
(305) 596-8461

-----Original Message-----

From: Carlos Sio [<mailto:Carlos.Sio@infor.com>]
Sent: Wednesday, June 11, 2014 10:28 AM
To: Crowley, Chris (ITD)

Cc: Jennifer Doyon
Subject: Reference Credits - Inforum

Hi Chris,
Our records show that MDC has enough credits from being a reference that may be redeemed for one Inforum pass.
Please let us know if you want to redeem it

Regards
Carlos

Sent from my iPhone