



Procurement Review Comprehensive Checklist
Procurement Services Division
This form must accompany all Purchase Order Requisitions

SECTION 1: DESCRIPTION

<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#:	RFP, BID, QUOTE OR RENEWAL #: 23-097-WEX	INITIAL TERM WITH RENEWALS: 1 YR + 3 X 1 YR TERM PERIODS	INITIAL TERM TOTAL COST: \$663,919.00
COMMITTEE: FINANCE	TARGET COMMITTEE DATE: 10/24/2023	PROMPT FOR RENEWAL:	CONTRACT TOTAL COST WITH ALL RENEWALS: \$2,655,676.00
	CURRENT TERM TOTAL COST: \$663,919.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Nortek Environmental, Inc.	VENDOR #:	DEPT: Community Services - Weatherization	DEPT CONTACT NAME: David Watkins
VENDOR CONTACT: Lisa Latimer	VENDOR CONTACT PHONE: 630-548-1500	DEPT CONTACT PHONE #: 630-407-6469	DEPT CONTACT EMAIL: david.watkins@dupageco.org
VENDOR CONTACT EMAIL: lisa@nortekenvironmental.com	VENDOR WEBSITE:	DEPT REQ #:	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Mechanical Services for Weatherization program (grant funded). RFP with pre-determined prices from State Market Analysis.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished Program provides energy efficiency upgrades and health & safety measures to eligible low income households. This reduces their utility bills and improves quality of life.			

SECTION 2: DECISION MEMO REQUIREMENTS

DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required.
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.
RFP (REQUEST FOR PROPOSAL)	

SECTION 3: DECISION MEMO

STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact. QUALITY OF LIFE
SOURCE SELECTION	Describe method used to select source. RFP
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action). DCEO State of IL recommended we add additional contractors to the Weatherization Program. We received additional funding from BIL legislation.

SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

JUSTIFICATION	Select an item from the following dropdown menu to justify why this is a sole source procurement.
NECESSITY AND UNIQUE FEATURES	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
MARKET TESTING	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
AVAILABILITY	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Nortek Environmental, Inc	Vendor#:	Dept: Weatherization	Division: Community Services
Attn: Lisa Latimer	Email: lisa@nortekenvironmental.com	Attn: David Watkins	Email: david.watkins@dupageco.org
Address: 600 Industrial Drive	City: Naperville	Address: 421 N. County Farm Rd. , Room 2-202	City: Wheaton
State: IL	Zip: 60563	State: IL	Zip: 60187
Phone: 630-548-1500	Fax: 630-548-1526	Phone: 630-407-6469	Fax: 630-407-6665
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Nortek Environmental, Inc	Vendor#:	Dept: Weatherization	Division: 600 Industrial Drive
Attn: Lisa Latimer	Email: isa@nortekenvironmental.com	Attn: David Watkins	Email: david.watkins@dupageco.org
Address: 600 Industrial Drive	City: Naperville	Address: 421 N. County Farm Rd. , Room 2-202	City: Wheaton
State: IL	Zip: 60563	State: IL	Zip: 60187
Phone: 630-548-1500	Fax: 630-548-1526	Phone: 630-407-6469	Fax: 630-407-6665
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Oct 30, 2023	Contract End Date (PO25): Nov 30, 2024
Contract Administrator (PO25):			

Purchase Requisition Line Details											
LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/ Activity Code	Unit Price	Extension
1	1	EA		Weatherization - Mechanical Services (Material & Labor) FY23/24		5000	1400	53090	23-461028	145,263.00	145,263.00
2	1	EA		Weatherization - Mechanical Services (Material & Labor) FY23/24		5000	1400	53090	22-402028	110,369.00	110,369.00
3	1	EA		Weatherization - Mechanical Services (Material & Labor) FY23/24		5000	1430	53090	23-221028	145,793.00	145,793.00
4	1	EA		Weatherization - Mechanical Services (Material & Labor) FY23/24		5000	1490	53090	24-251028	75,350.00	75,350.00
5	1	EA		Weatherization - Mechanical Services (Material & Labor) FY23/24		5000	1555	53090	RETROFITS 23	149,644.00	149,644.00
6	1	EA		Weatherization - Mechanical Services (Material & Labor) FY23/24		5000	1555	53090	RETROFITS 24	37,500.00	37,500.00
FY is required, assure the correct FY is selected.										Requisition Total	\$ 663,919.00

Comments	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached: ☒ W-9 ☒ Vendor Ethics Disclosure Statement