



# Procurement Review Comprehensive Checklist

## Procurement Services Division

This form must accompany all Purchase Order Requisitions

### SECTION 1: DESCRIPTION

| General Tracking  |  | Contract Terms                        |  |
|---|--|---------------------------------------|--|
| FILE ID#:   | RFP, BID, QUOTE OR RENEWAL #:            | INITIAL TERM WITH RENEWALS:<br>OTHER  | INITIAL TERM TOTAL COST:<br>\$180,827.00               |
| COMMITTEE:<br>PUBLIC WORKS  | TARGET COMMITTEE DATE:<br>12/05/2023     | PROMPT FOR RENEWAL:                   | CONTRACT TOTAL COST WITH ALL RENEWALS:<br>\$180,827.00 |
|   | CURRENT TERM TOTAL COST:<br>\$180,827.00 | MAX LENGTH WITH ALL RENEWALS:         | CURRENT TERM PERIOD:<br>INITIAL TERM                   |
| Vendor Information  |  | Department Information                |  |
| VENDOR:<br>Trane U.S. Inc.  | VENDOR #:<br>10180                       | DEPT:<br>Facilities Management        | DEPT CONTACT NAME:<br>Gavin Carroll                    |
| VENDOR CONTACT:<br>Jason Jellison   | VENDOR CONTACT PHONE:<br>630-734-6150    | DEPT CONTACT PHONE #:<br>630-407-2687 | DEPT CONTACT EMAIL:<br>gavin.carroll@dupagecounty.gov  |
| VENDOR CONTACT EMAIL:<br>jason.jellison@trane.com   | VENDOR WEBSITE:                          | DEPT REQ #:                           |  |
| Overview  |  |                                       |  |
| DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Recommendation for the approval of a contract to Trane U.S. Inc., to provide a comprehensive overhaul of the water cooled centrifugal duplex chiller at the power plant, for the period December 12, 2023 through November 30, 2024, for a contract total amount not to exceed \$180,827. Contract pursuant to the Intergovernmental Cooperation Act – OMNIA Partners Cooperative Quote R1-192593-23-001 Contract Number: #3341. |  |                                       |  |
| JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished<br>It is recommended that the chiller be inspected and overhauled every eight to ten years to prevent machine leaks and machine failures. Overhauling the chiller will increase the life and reliability of the machine and will help prevent unscheduled downtime.  |  |                                       |  |

### 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.     |
| COOPERATIVE (DPC2-352), GOVERNMENT JOINT PURCHASING ACT (30ILCS525) OR GSA SCHEDULE PRICING |  |

### 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.<br>QUALITY OF LIFE   |
| SOURCE SELECTION                    | Describe method used to select source.<br>Trane U.S. Inc. holds Governmental Joint Purchasing contracts for HVAC products, installation, services and related products and services; any work performed will be provided in accordance with the terms, conditions, and criteria established through this contract. Having the option to purchase through an Omnia Partners contract gives the County the flexibility to obtain specific services from previously vetted vendors which reduces lead and down times on critical projects.  |
| 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).<br>1. Staff recommends securing a contract to purchase items with Trane U.S. Inc. through Omnia Partners contract #3341. Having the option to purchase items through an Omnia Partners contract gives staff the flexibility to obtain specific materials from previously vetted vendors which reduces lead and down times on critical projects.<br>2. The second option includes sending out to quote or bid, however this is not recommended due to the additional time it will take, and it will not guarantee that a lower price for services will be found. |

## SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

|                                      |   |
|--------------------------------------|---|
| <b>JUSTIFICATION</b>                 | Select an item from the following dropdown menu to justify why this is a sole source procurement.   |
| <b>NECESSITY AND UNIQUE FEATURES</b> | 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. |
| <b>MARKET TESTING</b>                | 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.   |
| <b>AVAILABILITY</b>                  | 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:<br>Trane U.S. Inc.                      | Vendor#:<br>10180                  | Dept:<br>Facilities Management              | Division:  |
| Attn:   | Email:<br>jason.jellison@trane.com | Attn:                                       | Email:<br>FMAccountsPayable@dupagecount<br>y.gov |
| Address:<br>3600 Pammel Creek Rd.               | City:<br>La Crosse                 | Address:<br>421 N. County Farm Road         | City:<br>Wheaton                                 |
| State:<br>WI                                    | Zip:<br>54601                      | State:<br>IL                                | Zip:<br>60187                                    |
| Phone:<br>630-734-6150                          | Fax:                               | Phone:<br>630-407-5700                      | Fax:<br>630-407-5701                             |
| <i>Send Payments To:</i>                        |                                    | <i>Ship to:</i>                             |  |
| Vendor:   | Vendor#:                           | Dept:<br>Facilities Management              | Division:  |
| Attn:   | Email:                             | Attn:<br>Gavin Carroll                      | Email:<br>gavin.carroll@dupagecounty.gov         |
| Address:  | City:                              | Address:<br>410 N. County Farm Rd.          | City:<br>Wheaton                                 |
| State:  | Zip:                               | State:<br>IL                                | Zip:<br>60187                                    |
| Phone:  | Fax:                               | Phone:<br>630-407-2687                      | Fax:   |
| Shipping  |                                    | Contract Dates                              |  |
| Payment Terms:<br>PER 50 ILCS 505/1             | FOB:<br>Destination                | Contract Start Date (PO25):<br>Dec 12, 2023 | Contract End Date (PO25):<br>Nov 30, 2024        |
| Contract Administrator (PO25): Cathie Figlewski |                                    |   |  |

| Purchase Requisition Line Details                                |     |     |                            |                     |      |         |      |           |                             |                   |               |
|--|-----|-----|----------------------------|---------------------|------|---------|------|-----------|-----------------------------|-------------------|---------------|
| LN   | Qty | UOM | Item Detail<br>(Product #) | Description         | FY   | Company | AU   | Acct Code | Sub-Accts/<br>Activity Code | Unit Price        | Extension     |
| 1  | 1   | LO  |                            | #1 Chiller Overhaul | FY24 | 6000    | 1220 | 54010     | 2303403                     | 180,827.00        | 180,827.00    |
| <b><i>FY is required, assure the correct FY is selected.</i></b> |     |     |                            |                     |      |         |      |           |                             | Requisition Total | \$ 180,827.00 |

| Comments             |   |
|----------------------|---|
| HEADER COMMENTS      | Provide comments for P020 and P025.<br>#1 Chiller Overhaul at Power Plant   |
| SPECIAL INSTRUCTIONS | Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO.<br>Send PO to Cathie Figlewski, Katie Boffa and Clara Gomez |
| INTERNAL NOTES       | Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.<br>PW: 12/5/23   CB: 12/12/23                         |
| 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