



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#: 24-2522	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$406,619.00
COMMITTEE: PUBLIC WORKS	TARGET COMMITTEE DATE: 10/01/2024	PROMPT FOR RENEWAL: 6 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$406,619.00
	CURRENT TERM TOTAL COST: \$406,619.00	MAX LENGTH WITH ALL RENEWALS: THREE YEARS	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Trane U.S. Inc.	VENDOR #: 10180	DEPT: Facilities Management	DEPT CONTACT NAME: Mary Ventrella
VENDOR CONTACT: Molly Zielke	VENDOR CONTACT PHONE: 903-978-6312	DEPT CONTACT PHONE #: 630-407-5705	DEPT CONTACT EMAIL: mary.ventrella@dupagecounty.gov
VENDOR CONTACT EMAIL: molly.zielke@tranetechnologies.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.). Recommendation for the approval of a contract to Trane U.S. Inc., to provide a preventative / full-service maintenance program for the three (3) electric water chillers in the Power Plant, for a three (3) year period, October 9, 2024 through October 8, 2027, for a contract total amount not to exceed \$406,619. Contract pursuant to the Intergovernmental Cooperation Act – OMNIA Partners Cooperative Quote Contract Number: Racine #3341.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished It is necessary to have a preventative / full maintenance program for the campus Power Plant chillers to ensure continued reliable cooling for the campus.			

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

SOURCE SELECTION	Describe method used to select source. The Trane electric water chillers were installed in the late 1990's and have been maintained exclusively by Trane. Trane US Inc. holds Governmental Joint Purchasing contract #Racine 3341with OMNIA Partners for HVAC equipment, installation, services and related products.
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). 1. Staff recommends securing a contract with Trane U.S. Inc. utilizing OMNIA Partners Contract #Racine 3341 pricing. 2. The second option is to send these services out to bid. This is not recommended do to additional time it will take and will not guarantee that a lower price for services will be found. Other companies may claim to work on Trane equipment but will not have the staff, training or expertise as provided by Trane U.S. Inc.

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: Trane U.S. Inc.	Vendor#: 10180	Dept: Facilities Management	Division:
Attn: Molly Zielke	Email: molly.zielke@tranetechnologies.com	Attn:	Email: FMAccountsPayable@dupagecounty.gov
Address: 800 East Beaty Street	City: Davidson	Address: 421 N. County Farm Road	City: Wheaton
State: NC	Zip: 28036	State: IL	Zip: 60187
Phone: 903-978-6312	Fax:	Phone: 630-407-5700	Fax: 630-407-5701
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Trane U.S. Inc.	Vendor#: 10180	Dept: Facilities Management	Division:
Attn:	Email:	Attn: Gavin Carroll	Email: gavin.carroll@dupagecounty.gov
Address: PO Box 98167	City: Chicago	Address: 410 N. County Farm Road	City: Wheaton
State: IL	Zip: 60693	State: IL	Zip: 60187
Phone:	Fax:	Phone:	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Oct 9, 2024	Contract End Date (PO25): Oct 8, 2027

Purchase Requisition Line Details

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/ Activity Code	Unit Price	Extension
1	2	EA		REPAIR & MTCE FACILITIES- Oct 9, 2024 thru Nov 30, 2024	FY24	1000	1100	53300		10,883.85	21,767.70
2	10	EA		REPAIR & MTCE FACILITIES- Dec 1, 2024 thru Sept 30,2025	FY25	1000	1100	53300		10,883.83	108,838.30
3	2	EA		REPAIR & MTCE FACILITIES- Oct 1, 2025 thru Nov 30, 2025	FY25	1000	1100	53300		11,275.10	22,550.20
4	10	EA		REPAIR & MTCE FACILITIES- Dec 1, 2025 thru Sept 30, 2026	FY26	1100	1100	53300		11,275.08	112,750.80
5	2	EA		REPAIR & MTCE FACILITIES- Oct 1, 2026 thru Nov 30, 2026	FY26	1000	1100	53300		11,726.00	23,452.00
6	10	EA		REPAIR & MTCE FACILITIES- Dec 1, 2026 thru Oct 8, 2027	FY27	1000	1100	53300		11,726.00	117,260.00
										Requisition Total	\$ 406,619.00

FY is required, ensure the correct FY is selected.

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025. Provide a preventative / full-service maintenance program for the three (3) electric water chillers in the Power Plant, for Facilities Management. Year 1 \$130,606.00 Year 2 \$135,301.00 Year 3 \$140,712.00
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Send PO to Vendor, Mary Ventrella, Cathie Figlewski, and Clara Gomez.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO. Public Works: 10/01/24 County Board; 10/08/24
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.