



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

SECTION 1: DESCRIPTION

General Tracking		Contract Terms	
FILE ID#: 23-2166	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$29,925.00
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 07/11/2023	PROMPT FOR RENEWAL:	CONTRACT TOTAL COST WITH ALL RENEWALS: \$29,925.00
	CURRENT TERM TOTAL COST: \$29,925.00	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
Vendor Information		Department Information	
VENDOR: Learning Tree International USA, Inc.	VENDOR #: 11739	DEPT: Information Technology	DEPT CONTACT NAME: Wendi Wagner
VENDOR CONTACT: Clarie Zorrilla	VENDOR CONTACT PHONE: 877-589-4625	DEPT CONTACT PHONE #: 630-407-5064	DEPT CONTACT EMAIL: wendi.wagner@dupageco.org
VENDOR CONTACT EMAIL: Claire_Zorrilla@LearningTree.com	VENDOR WEBSITE: learningtree.com	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.). Procurement of a total of fifteen (15) training vouchers to be used by technical staff in Information Technology. These vouchers are non-expiring and can be used for any class at Learning Tree. This is being purchased under GSA contract #GS-35F-369CA pricing in the amount of \$29,925.00.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished This will allow IT staff to stay up to date with training on current and upcoming technologies.			

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. CUSTOMER SERVICE
SOURCE SELECTION	Describe method used to select source. Learning Tree has been providing training to DuPage County IT for the past several years. They offer classes on a variety of technologies. Using GSA contract #GS-35F-369CA, the vouchers are non-expiring so can be used for years to come. Procuring classes one at a time is more expensive than purchasing vouchers up front.
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). Staff recommends purchasing the vouchers so all IT staff can be properly trained.

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: Learning Tree International USA, Inc.	Vendor#: 11739	Dept: Information Technology	Division:
Attn: Maxwell Sierra	Email: Claire_Zorrilla@LearningTree.com and Maxwell_Sierra@learningtree.com	Attn: Sarah Godzicki	Email: sarah.godzicki@dupageco.org
Address: 13650 Dulles Technology Drive, 1st Floor, Suite 175	City: Herndon	Address: 421 N. County Farm Road	City: Wheaton
State: VA	Zip: 20171	State: IL	Zip: 60187
Phone: 877-589-4625	Fax:	Phone: 630-407-5037	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Learning Tree International USA, Inc.	Vendor#:	Dept: Information Technology	Division:
Attn:	Email:	Attn: Wendi Wagner	Email: wendi.wagner@dupageco.org
Address: DEPT AT 952907	City: Atlanta	Address: 421 N. County Farm Road	City: Wheaton
State: GA	Zip: 33192-2907	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5064	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Jul 11, 2023	Contract End Date (PO25): Jul 10, 2024
Contract Administrator (PO25): Wendi Wagner			

Purchase Requisition Line Details											
LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/ Activity Code	Unit Price	Extension
1	15	EA		GSA Training Vouchers - Non-Expiring	FY23	1000	1110	53610		1,995.00	29,925.00
FY is required, assure the correct FY is selected.										Requisition Total	\$ 29,925.00

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. Please email PO to Sarah Godzicki & Wendi Wagner and copy both when emailing to vendor.
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