



# 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#: 23-3656	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS:	INITIAL TERM TOTAL COST: \$43,720.48
COMMITTEE: HUMAN SERVICES	TARGET COMMITTEE DATE: 11/21/2023	PROMPT FOR RENEWAL: 6 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$43,720.48
	CURRENT TERM TOTAL COST:	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD:
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: WellSky Corporation	VENDOR #: 30141	DEPT: Community Services	DEPT CONTACT NAME: Julie Burdick
VENDOR CONTACT: Marsha Blankenship	VENDOR CONTACT PHONE: 318-524-7611	DEPT CONTACT PHONE #: 630-407-6462	DEPT CONTACT EMAIL: Julie.Burdick@dupageco.org
VENDOR CONTACT EMAIL: Marsha.Blankenship@WellSky.com	VENDOR WEBSITE: https://wellsky.com	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.). Renewal of Homeless Management Information System (HMIS) software , support, 150 HMIS user licenses, and 75 211 user licenses totaling \$43,720.48. Sole Source.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished Continue shared use of a regional Homeless Management Information System (HMIS) to meet the data and reporting requirements of the US Dept. of Housing and Urban Development, Veterans Administration, and Health and Human Services, and to address regional reporting and resource coordination. This software also hosts 211 DuPage program and resource data.			

### 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. SOLE SOURCE PER DUPAGE ORDINANCE, SECTION 2-350 (MUST FILL OUT SECTION 4)
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

### 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.
SOURCE SELECTION	Describe method used to select source.
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).

## 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. SOFTWARE MANUFACTURER AND SOLE MAINTENANCE/UPDATE PROVIDER
<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. WellSky provides a HMIS and 211 compliant software, mandated reports, and report writing capabilities that we share with another Continuum of Care (CoC). This software is used by multiple CoC's in our region and statewide, which allows for improved service and system management collaboration. It also hosts our resource database, 211dupage.gov and is used to track and report on the 211 DuPage call and need data.
<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. We continue to monitor for HMIS software vendors who meet all of the minimum Federal requirements and are also 211 compliant. At this time, WellSky is the only vendor offering both solutions.
<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. Attended a CAP60 (1/17/23) and ClientTrack (1/20/23) Demo. CAP60 is not HMIS or 211 compliant and ClientTrack meets HMIS standards but is not 211 compliant. We participate in national, statewide and regional collaborations, which gives us an opportunity to speak with HMIS and 211 customers and vendors in formal and informal settings to better assess what options are available to meet our needs. We have yet to find another vendor who offers software that is compliant with both HMIS and 211.

## SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: WellSky Corporation	Vendor#: 30141	Dept: Community Services	Division: Intake and Referral
Attn: Marsha Blankenship	Email: Marsha.Blankenship@WellSky.com	Attn: Julie Burdick	Email: Julie.Burdick@dupageco.org
Address: 113005 Switzer Rd.	City: Overland Park	Address: 421 N County Farm Rd.	City: Wheaton
State: KS	Zip: 66210	State: IL	Zip: 60187
Phone: 318-524-7611	Fax:	Phone: 630-407-6462	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: WellSky Corporation	Vendor#: 30141	Dept: Community Services	Division: Intake and Referral
Attn:	Email:	Attn: Julie Burdick	Email: Julie.Burdick@dupageco.org
Address: PO Box 204176	City: Dallas	Address: 421 N County Farm Rd.	City: Wheaton
State: TX	Zip: 75320-4176	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-6462	Fax:
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Nov 1, 2023	Contract End Date (PO25): Oct 31, 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		Software, Support, API, 225 user licenses	FY23	1100	1215	53806	COVID-19 CS	9,372.00	9,372.00
2	1	EA		Software, Support, API, 225 user licenses	FY23	5000	1480	53806	IL0306L5T1 42215	21,700.00	21,700.00
3	1	EA		Software, Support, API, 225 user licenses	FY23	5000	1470	53820	ESG23HMI S22	8,700.00	8,700.00
4	1	EA		Software, Support, API, 225 user licenses	FY23	1000	1750	53806		3,948.48	3,948.48
<b><i>FY is required, assure the correct FY is selected.</i></b>										Requisition Total	\$ 43,720.48

<i>Comments</i>	
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