



Procurement Review Comprehensive Checklist

Procurement Services Division

This form must accompany all Purchase Order Requisitions

SECTION 1: DESCRIPTION

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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|---------------------------------------|-------------------------------------------------------|
| <i>General Tracking</i> | | <i>Contract Terms</i> | |
| FILE ID#: | RFP, BID, QUOTE OR RENEWAL #: | INITIAL TERM WITH RENEWALS: OTHER | INITIAL TERM TOTAL COST: \$27,152.00 |
| COMMITTEE: ECONOMIC DEVELOPMENT | TARGET COMMITTEE DATE: 6/18/2024 | PROMPT FOR RENEWAL: | CONTRACT TOTAL COST WITH ALL RENEWALS: \$27,152.00 |
| | CURRENT TERM TOTAL COST: \$27,152.00 | MAX LENGTH WITH ALL RENEWALS: | CURRENT TERM PERIOD: INITIAL TERM |
| <i>Vendor Information</i> | | <i>Department Information</i> | |
| VENDOR: Walker-Miller Energy Services | VENDOR #: | DEPT: HR-WDD | DEPT CONTACT NAME: Lisa Schvach |
| VENDOR CONTACT: Crystal Davis | VENDOR CONTACT PHONE: 708-928-9890 | DEPT CONTACT PHONE #: 630.955.2066 | DEPT CONTACT EMAIL: lschvach@worknetdupage.org |
| VENDOR CONTACT EMAIL: cdavis@wmenergy.com | VENDOR WEBSITE: www.wmenergy.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.). Training and supportive services costs aligned with workforce development component of Energy Efficiency & Conservation Block Grant (EECBG); funds will be utilized to expand capacity of the Novice Workforce Training & Employment program provided by Walker-Miller Energy Services and Nicor Gas by up to two students ; sole source as the program is proprietary to Nicor/Walker-Miller | | | |
| JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished To meet objectives and key activities of the Energy Efficiency & Conservation Block Grant (EECBG) workforce development component through provision of job training and work-based learning leading to careers in energy efficiency relevant areas | | | |

SECTION 2: DECISION MEMO REQUIREMENTS

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|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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

| | |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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

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|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JUSTIFICATION | Select an item from the following dropdown menu to justify why this is a sole source procurement. OTHER |
| 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. The Novice Workforce Training & Employment program designed and offered by Nicor and Walker-Miller Energy Services is a proprietary program that seeks to diversify and expand the energy efficiency workforce. The program prepares students for industry-recognized credentials, provides for wraparound supports, and connects students to paid on-the-job training opportunities; thus, aligning with the objectives of the EECBG workforce component. |
| 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. This program was designed by Nicor and Walker-Miller Energy Services. |
| 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. Various other clean energy and energy efficiency options have been explored and ruled out due to cost exceeding available funds, vendor not having a physical location at which to offer training, lack of satisfactory outcomes tied to energy efficient employment, etc. |

SECTION 5: Purchase Requisition Information

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|------------------------------------------|---------------------------------------------|-----------------------------------------|-----------------------------------------|
| <i>Send Purchase Order To:</i> | | <i>Send Invoices To:</i> | |
| Vendor: Walker-Miller Energy Services | Vendor#: | Dept: HR | Division: WDD |
| Attn: Greg Walker | Email: gwalker@wmenergy.com | Attn: Lisa Schvach | Email: lschvach@worknetdupage.org |
| Address: 8045 Second Ave | City: Detroit | Address: 2525 Cabot Drive, Suite 302 | City: Lisle |
| State: MI | Zip: 48202 | State: IL | Zip: 60532 |
| Phone: 313-366-8535 | Fax: | Phone: 630-955-2066 | Fax: |
| <i>Send Payments To:</i> | | <i>Ship to:</i> | |
| Vendor: Walker-Miller Energy Services | Vendor#: | Dept: | Division: |
| Attn: Cassandra Mayes | Email: wmaccountsreceivable@wmenergy.com | Attn: | Email: |
| Address: 8045 Second Avenue | City: Detroit | Address: | City: |
| State: MI | Zip: 48202 | State: | Zip: |
| Phone: | Fax: | Phone: | Fax: |
| Shipping | | Contract Dates | |
| Payment Terms: PER 50 ILCS 505/1 | FOB: Destination | Contract Start Date (PO25): 7/1/2024 | Contract End Date (PO25): 10/31/2024 |

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 | | EECBG Workforce Training & Employment Program | FY24 | 5000 | 2704 | 53820 | DE-SE0000181 | 27,152.00 | 27,152.00 |
| Requisition Total | | | | | | | | | | | \$ 27,152.00 |

FY is required, ensure the correct FY is selected.

Comments

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|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 copy the following individuals when sending so they route for signature: Delilah Burnside - dburnside@wmenergy.com Dr. Crystal Davis - cdavis@wmenergy.com Derrick Meeking – dmeeking@wmenergy.com Jad Bazzi - Jad Bazzi jbazzi@wmenergy.com Nazzar Smith - nsmith@wmenergy.com Jessica Farjo - jfarjo@wmenergy.com |
| 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. |