



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>	
MINUTETRAQ ID#: 23-1638	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS: 3 YRS + 1 X 1 YR TERM PERIOD	INITIAL TERM TOTAL COST: \$238,500.00
COMMITTEE: FINANCE	TARGET COMMITTEE DATE: 05/09/2023	PROMPT FOR RENEWAL: 6 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$318,000.00
	CURRENT TERM TOTAL COST: \$79,500.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: FIRST RENEWAL
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Mesirow Insurance Services, Inc. (an Alliant-owned company)	VENDOR #: 12104	DEPT: Finance - Tort Liability	DEPT CONTACT NAME: Jim Morrissy
VENDOR CONTACT: Cathy Juricic	VENDOR CONTACT PHONE: 312-595-8149	DEPT CONTACT PHONE #: 630-407-6116	DEPT CONTACT EMAIL: Jim.Morrissy@dupageco.org
VENDOR CONTACT EMAIL: Catherine.Juricic@alliant.com	VENDOR WEBSITE: alliant.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.). Approval of a one-year renewal to Mesirow Insurance Services, Inc. (an Alliant-owned company) to provide insurance brokerage services for DuPage County.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The County does not have the ability to broker its own insurance and has historically utilized insurance brokers to ensure the best coverages at the best prices.			

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.
RENEWAL OF RFP	

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. FINANCIAL PLANNING
SOURCE SELECTION	Describe method used to select source. Mesirow Insurance Services, Inc. (an Alliant-owned company) was chosen from four broker submittals. Mesirow Insurance Services, Inc. is our current broker and has saved the County over a 50% reduction in broker service fees/costs since the initial contract in 2011. In addition, their vast experience in providing brokerage services to over 100 counties including Cook, Kendall, Lake and Will, allows for increased marketing leverage with our numerous coverages, including the difficult to obtain Law Enforcement and Employee Practices Liability.
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 approving the renewal. Other options would include doing nothing, or starting the RFP process over again.

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: Mesirow Insurance Services, Inc. (an Alliant-owned company)	Vendor#: 12104	Dept: DuPage County	Division: Finance - Tort Liability
Attn: Cathy Juricic	Email: Catherine.Juricic@alliant.com	Attn: Jim Morrissy	Email: jim.morrissy@dupageco.org
Address: 353 N. Clark St	City: Chicago	Address: 421 N. County Farm Road	City: Wheaton
State: IL	Zip: 60654	State: IL	Zip: 60187
Phone: 312-595-8149	Fax:	Phone: 630-407-6116	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Mesirow Insurance Services, Inc. (an Alliant-owned company)	Vendor#: 12104	Dept: DuPage County	Division: Finance - Tort Liability
Attn:	Email:	Attn: Jim Morrissy	Email: jim.morrissy@dupageco.org
Address: 29278 Network Place	City: Chicago	Address: 421 N. County Farm Road	City: Wheaton
State: IL	Zip: 60673-1292	State: IL	Zip: 60187
Phone:	Fax:	Phone:	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): 06/01/2023	Contract End Date (PO25): 05/31/2024
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		Insurance Brokerage Services	FY23	1100	1212	53090		79,500.00	79,500.00
<i>FY is required, assure the correct FY is selected.</i>										Requisition Total	\$ 79,500.00

<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