



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#: FI-P-0021-23	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$784,298.00
COMMITTEE: FINANCE	TARGET COMMITTEE DATE: 11/14/2023	PROMPT FOR RENEWAL:	CONTRACT TOTAL COST WITH ALL RENEWALS: \$784,298.00
	CURRENT TERM TOTAL COST: \$784,298.00	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD:
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Alliant/Mesirow Insurance Services, Inc. (Safety National/Upland Speciality/AWAC)	VENDOR #: 12104 R02	DEPT: Finance	DEPT CONTACT NAME: Jim Morrissy
		DEPT CONTACT PHONE #: (630) 407-6116	DEPT CONTACT EMAIL: Jim.Morrissy@dupageco.org
VENDOR CONTACT: Wendy Teller	VENDOR CONTACT PHONE: (312) 595-7495	DEPT REQ #:	
VENDOR CONTACT EMAIL: Wendy.Teller@alliant.com	VENDOR WEBSITE:		
<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.). Secure Excess Liability Insurance for DuPage County and the DuPage County Health Department at a cost of \$784,298.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished To protect the County and the Health Department against catastrophic liability loss. The County has carried excess liability coverage since 1995, to ensure that if a major loss occurs, there is coverage without the risk of depleting our reserves.			

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.
OTHER PROFESSIONAL SERVICES (DETAIL SELECTION PROCESS ON DECISION MEMO)	

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. Broker solicited 16 insurance carriers.
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). Safety National continues to provide the best option for the lead excess layer and the workers compensation. The incumbent carriers on the excess limits also provide the best renewal. A 14% increase on the excess liability. Premiums are increased from expiring, but this is largely due to increased payroll and overall budget numbers which have increased 13% and 20% from expiring. On the excess layers, we were successful in securing competitive options from Berkley and Upland on the \$5 million layer above Safety National. This layer is currently shared by Homesite and Kinsale, Berkley quoted the entire layer at a similar premium, and Upland provided a competitive quote that will save about \$19,000. The Upland quote provides defense is outside the limits on Law Enforcement Liability, where Kinsale is defense inside the limits.

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: Alliant/Mesirow Insurance Services, Inc.	Vendor#: 12104 R02	Dept: DuPage County	Division: Finance Department
Attn: Wendy Teller	Email: Wendy.Teller@alliant.com	Attn: Jim Morrissy	Email: jim.morrissy@dupageco.org
Address: 353 N. Clark St	City: Chicago	Address: 421 N. County Farm Rd	City: Wheaton
State: IL	Zip: 60654	State: IL	Zip: 60187
Phone: (312)595-7495	Fax: (312) 595-7163	Phone: (630) 407-6116	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Alliant/Mesirow Insurance Services, Inc.	Vendor#: 12104 R02	Dept: DuPage County	Division: Finance Department
Attn:	Email:	Attn: Jim Morrissy	Email: jim.morrissy@dupageco.org
Address: 29278 Network Place	City: Chicago	Address: 421 N. County Farm Rd.	City: Wheaton
State: IL	Zip: 60673-1292	State: IL	Zip: 60187
Phone:	Fax:	Phone: (630) 407-6116	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Dec 1, 2023	Contract End Date (PO25): Dec 1, 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		This requisition is for General and Automobile Liability Insurance Services. Safety National	FY24	1100	1212	53130		317,354.00	317,354.00
2	1	EA		Upland Specialty	FY24	1100	1212	53130		290,062.00	290,062.00
3	1	EA		AWAC	FY24	1100	1212	53130		176,882.00	176,882.00
<i>FY is required, assure the correct FY is selected.</i>										Requisition Total	\$ 784,298.00

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025. \$5,000,000 Total Excess; \$2,000,000 SIR - \$5M excess \$5M primary - \$10M excess \$10M Excess Liability. This contract covers the period of December 1, 2023 to December 1, 2024.
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