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

SECTION 1: DESCRIPTION

General Tracking		*Contract Terms*	
FILE ID#:	RFP, BID, QUOTE OR RENEWAL #: PSA	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: $358,415.10
COMMITTEE: TRANSPORTATION	TARGET COMMITTEE DATE: 05/18/2024	PROMPT FOR RENEWAL:	CONTRACT TOTAL COST WITH ALL RENEWALS: $358,415.10
	CURRENT TERM TOTAL COST: $358,415.10	MAX LENGTH WITH ALL RENEWALS:	CURRENT TERM PERIOD: INITIAL TERM
Vendor Information		*Department Information*	
VENDOR: H.W. Lochner, Inc.	VENDOR #: 12406	DEPT: Division of Transportation	DEPT CONTACT NAME: William C. Eidson
VENDOR CONTACT: Michael Zorn	VENDOR CONTACT PHONE: 312-994-9762	DEPT CONTACT PHONE #: 630-407-6900	DEPT CONTACT EMAIL: william.eidson@dupagecounty.gov
VENDOR CONTACT EMAIL: mzorn@hwlochner.com	VENDOR WEBSITE:	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.). Professional Concept Development Engineering Services and PHI-update for the 31st Street Multi-Use Trail from Highland Avenue to Meyers Road. Section #11-00201-02-BT for a total contract encumbrance of $358,415.10.

JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished
The Division of Transportation is in need of preliminary concept development, and PHI/PHII engineering services for a proposed multi-use trail along Highland Avenue from the Highland Avenue to Meyers Road in the Village of Downers Grove and the Village of Oak Brook.

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.
PROFESSIONAL SERVICES EXCLUDED PER DUPAGE ORDINANCE (SECTION 2-353) AND 50 ILCS 510/2 (ARCHITECTS, ENGINEERS & LAND SURVEYORS)	

SECTION 3: DECISION MEMO

SOURCE SELECTION	Describe method used to select source. The DOT only selects firms that are pre-qualified in accordance with IDOT guidelines. Requests for Statements of Interest were sent to firms throughout the industry. Statements of Interest were received from 25 firms. Based on the review of the Statements of Interest, 3 firms were shortlisted and requested to submit a Statement of Qualification. The DOT reviewed each submittal taking into consideration the technical approach to the project, understanding of key considerations, experience with similar projects, experience with key team members, and strategies to ensure timely completion of all phases. Based on a comprehensive review of the submittals, the DOT determined that the project team assembled by H.W. Lochner, Inc. was most qualified and had the staff available to perform the work on behalf of the County.
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). 1. Award a contract to H.W. Lochner, Inc., this is the recommended option. 2. Contract with another firm. Not recommended due to staff's determination that H.W. Lochner, Inc., is the most qualified. 3. Do not award a contract. Not recommended as the DOT does not possess the staff resources to perform this work and must contract for these services.

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			
Send Purchase Order To:		*Send Invoices To:*	
Vendor: DO NOT SEND TO VENDOR	Vendor#:	Dept: DOT Finance	Division:
Attn:	Email:	Attn:	Email: DOTFinance@dupagecounty.gov
Address:	City:	Address: 421 N County Farm Road	City: Wheaton
State:	Zip:	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-6900	Fax: 630-407-6901
Send Payments To:		*Ship to:*	
Vendor: H.W. Lochner, Inc.	Vendor#:	Dept:	Division:
Attn:	Email:	Attn:	Email:
Address: ACH	City:	Address:	City:
State:	Zip:	State:	Zip:
Phone:	Fax:	Phone:	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Jun 25, 2024	Contract End Date (PO25): Oct 31, 2026

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		11-00201-02-BT (FY24)	FY24	1500	3500	54040	31_HGHLD _MYRS	89,000.00	89,000.00
2	1	EA		11-00201-02-BT (FY25)	FY25	1500	3500	54040	31_HGHLD _MYRS	180,415.10	180,415.10
3	1	EA		11-00201-02-BT (FY26)	FY26	1500	3500	54040	31_HGHLD _MYRS	89,000.00	89,000.00

FY is required, ensure the correct FY is selected.

Requisition Total $ 358,415.10

Comments	
HEADER COMMENTS	Provide comments for P020 and P025. Professional Concept Development Engineering Services and PHI-update for the 31st Street Multi-Use Trail from Highland Avenue to Meyers Road. Section #11-00201-02-BT
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. DOT will issue a formal NTP, do not send copy of PO to vendor.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO. Last invoice date October 31, 2027. Send copy of PO via email to DOTFinance@dupagecounty.gov & Joan.McAvoy@dupagecounty.gov
APPROVALS	Department Head signature approval for procurements under $15,000. Procurement Officer Approval for ETSB.