

Sole Source Justification Form

Bulletin Reference Number

814-010-083

Requesting Agency/University

Capital Development Board

Sole Source Justification Form - Part I

Section I - General Information

Department/Bureau/Section: Capital Development Board - Construction

Need Identified Date: 8/23/2023

Supply/Service Need By Date: 3/25/2025

Project Title: Repair HVAC and Pool - Jacoby Dickens Center

Vendor: Mechanical, Inc.

Provide a description of the supplies or services required:

Complete the HVAC installation required for the project and complete the project closeout, including project substantial completion and project final acceptance, including punch list items.

Value: Actual

Value of Initial Term, this Change Order or Amendment: 498,987.62

Will this Sole Source amend a Professional or Artistic Services contract? ☐ Yes ☒ No

*Sole Source may not be used for amendments for Professional or Artistic Services if the amendment would increase the value by more than 5% of the initial award or extend the term by more than 60 days.

Type: New Sole Source

Section II - Proposed Term

☐ One-Time Purchase ☒ Term Contract

Estimated Contract Begin Date: 3/25/2025

Estimated Contract End Date: 1/31/2026

Number of Potential Renewals: 0

Length of Each Renewal in Months: 0

Total Value of All Renewals: 0

If a Term Contract, does the term, including renewals, exceed 12 months? ☐ Yes ☒ No

Section III - Funding Source

Select the type of funding to be used (Check all that apply): ☒ State Appropriate Funds ☐ Federal Funds ☐ Other (Explain):

Section IV - Sole Source Justification

This purchase is economically only available from a single source **primarily** because it is: (If "Other" explain in one sentence)

Pursuant to 44 ILL Adm Code 8.2025 b)5), contract has expired, but the supplies or services have not been fully received.

Are there secondary justification(s) for this sole source? ☐ Yes ☒ No

Section V - Purchase History

Has the Agency or University Purchased these supplies or services in the past? ☐ Yes ☒ No

Section VI - Business Rationale

1. Provide a detailed explanation of the need for the supplies or services:

Contract expired with HVAC installation and project closeout at the Jacoby Dickens Center not yet completed.

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2. Provide a list and describe in detail the specifications required to satisfy the need:

Contract needs to be reestablished to complete work and pay the Mechanical Contractor and subcontractors for work completed.

3. Provide detail explaining the justification selected in Section IV to explain why the requested supplies or services are the only ones available that can satisfy the agency or university requirements?

Mechanical Contractor has previously established contract that expired, new contract needed to keep warranties valid after completion.

4. What are the unique features of the supplies or services that are not available in any other product or by any other vendor? Provide specific quantifiable factors/qualifications:

Mechanical Contractor has the warranties and subcontractor contracts to complete this project as originally intended.

5. Has the Agency or University considered alternative supplies or services to satisfy their need? ☐ Yes ☒ No

5a. If no, why weren't alternatives evaluated?

Contractor holds warranty for work and materials completed.

6. Are there resellers or distributors?

☐ Yes ☐ No ☒ N/A

7. What efforts were made to get the best possible price (i.e. did the agency/university negotiate) and how did you determine the price for this purchase is considered fair and reasonable?

Project was originally competitively bid to the general public, and Mechanical Contractor was determined to be the low, responsive bidder.

8. Will this purchase obligate the State to this vendor for future purchases such as maintenance, licensing or continuing need?

☐ Yes ☒ No

9. What will be the financial or other impact to the State if this sole source is not approved and a competitive bid is required?

Project will remain stopped, and HVAC installation will remain incomplete which may lead to damage if the contractor is not under contract to maintain site.

10. Is there any additional information you would like to add to justify this sole source?

The initial RFPCO CO H-5 attempted to extend this contract, but was submitted on 9/4/23, after the contract expiration date of 8/23/23. RFPCO H-011 was issued to extend this contract and was CARFED by the CPO on 12/12/24. The completion of the Mechanical Contractor's scope of work is imperative for the completion of the project.

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Section VII

Requesting Department Signature Required

I know and understand the contents of this Sole Source Justification and attest that all statements are true and correct and the fairness and reasonableness of the price was adequately confirmed.

Requesting Department Representative

Phone Number

312-814-8806

Date

1/23/2025

Printed Name

Mark Jones

E-mail Address

mark.jones2@illinois.gov

State Agency Bureau/Division Head or University Purchasing Director Approval and Signature Required

I know and understand the contents of this Sole Source Justification and attest that all statements are true and correct and the fairness and reasonableness of the price was adequately confirmed. (All prior form fields will lock once this e-signature is completed)

Agency Bureau/Division Head or University
Purchasing Director and Not a Designee

Phone Number

217-782-0601

Date

Feb 25, 2025

Printed Name

Timothy E. Patrick

E-mail Address

tim.patrick@illinois.gov

SPO Approval and Signature Required

☒ I have reviewed and understand the contents of this Sole Source Justification and agree with the State Agency or University determination.

☐ I have reviewed and understand the contents of this Sole Source Justification and do not agree with the State Agency or University determination. As a result, the State Agency or University must explore other sourcing methods to satisfy their need.

State Purchasing Officer Signature

Phone Number

217-836-0185

Date

Feb 26, 2025

Printed Name

Gerald S. Burlingham, CPPO

E-mail Address

gerald.burlingham@illinois.gov

Sole Source Justification Form

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Sole Source Justification Form - Part II

Section I - General Information

Project Title

Repair HVAC and Pool - Jacoby Dickens Center

Vendor

Mechanical, Inc.

Initial Date of Procurement Bulletin Posting

Feb 26, 2025

Was a Sole Source hearing held per 30 ILCS 500/20-25?

☐ Yes - Complete Section II and III below (Section II will only be visible when this option is selected)

☒ No - Section II not required, go to Section III below

Section III - CPO Approval and Signature Required

☒ Based on my review, I authorize the Agency/University to proceed in accordance with the published Notice referenced above.

☐ Based upon my review, I authorize the Agency/University to proceed with the following Changes.

☐ Based on my review, the Agency/University is not authorized to proceed with this sole source as presented and my recommendation is that it be cancelled.

☐ Other

CPO Signature

CPO Phone

217-836-0185

Printed Name

Gerald S. Burlingham

Date

Mar 10, 2025

CPO E-mail

gerald.burlingham@illinois.gov