



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#: 26-0751	RFP, BID, QUOTE OR RENEWAL #: 25-012-HR	INITIAL TERM WITH RENEWALS: 3 YRS + 1 X 1 YR TERM PERIOD	INITIAL TERM TOTAL COST: \$600,000.00
COMMITTEE: FINANCE	TARGET COMMITTEE DATE: 02/24/2026	PROMPT FOR RENEWAL: 6 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$800,000.00
	CURRENT TERM TOTAL COST: \$600,000.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Marsh & McLennan Agency, LLC	VENDOR #: 27831	DEPT: Human Resources	DEPT CONTACT NAME: Christine Clevenger
VENDOR CONTACT: Christopher Bouschet	VENDOR CONTACT PHONE: 248-822-8000	DEPT CONTACT PHONE #: 630-407-6300	DEPT CONTACT EMAIL: christine.clevenger@dupagecounty.gov
VENDOR CONTACT EMAIL: christopher.bouschet@marshmma.com	VENDOR WEBSITE: marshmma.com	DEPT REQ #: N/A	

<b>Overview</b>
<p><b>DESCRIPTION</b> Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). A Request For Proposal (RFP) was issued to procure a Health and Wellness Benefits Consultant to assist the County in assessing and evaluating County health and welfare plans, renewal offers, plan design developments and alternatives. A Health and Wellness Benefits Consulting Service is necessary to assist Human Resources and Finance in maintaining competitive and fiscally sound benefits for County employees. The contract will be \$600,000 for three years. Additionally the consultant will be allowed to receive any payable commissions which offset annual consultant fees, not to exceed \$200,000 per year.</p> <p><b>JUSTIFICATION</b> Summarize why this procurement is necessary and what objectives will be accomplished  The County's healthcare planning and administration consultants provide vital assistance to the Human Resources and Finance Departments in planning and designing the County's self-insured healthcare program. The consultant provides the County with trend data, information, and research on critical issues regarding rising healthcare costs and significant changes to federal and state healthcare laws. The consultant assists the County in determining what healthcare and benefit plans to make available to its employees and implementing best practice methods to reduce costs. One of the pinnacle components of information consultants submit is their pride in having established relationships with their clients. Knowing them and their organization and being able to help them quickly adjust, pivot, and/or change direction when needed. Marsh &amp; McLennan have played a key role in helping the County Board reset its benefits programs and direction that have yielded substantial savings to the County.</p>

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.
RFP (REQUEST FOR PROPOSAL)	

SECTION 3: DECISION MEMO

SOURCE SELECTION	Describe method used to select source. A Request For Proposal (RFP) was issued to find the the lowest, responsible bidder. Six submittals were reviewed and scored. The review team finalized the selection through consensus. Partnering with Marsh & McLennan provides the County with a sizable health and benefits practice, substantial pharmaceutical market experience and extensive public sector experience.
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 approval of a three-year agreement with Marsh & McLennan for benefits consulting services. Alternatives: 1) Select and recommend another benefits consultant from the RFP shortlist. 2) Process another shortlist from the RFP in order to identify a candidate firm for recommending to the Board.

### SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b> Select an item from the following dropdown menu to justify why this is a sole source procurement.	
<b>NECESSITY AND UNIQUE FEATURES</b>	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.
<b>MARKET TESTING</b>	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.
<b>AVAILABILITY</b>	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: Marsh & McLennan Agency, LLC	Vendor#: 27831	Dept: Human Resources	Division:
Attn: Christopher Bouschet	Email: christopher.bouschet@marshmma.com	Attn:	Email: dpchumanresources@dupagecounty.gov
Address: 755 West Big Beaver Rd, Suite 2300	City: Troy	Address: 421 N. County Farm Rd	City: Wheaton
State: MI	Zip: 48084	State: IL	Zip: 60187
Phone: 248-822-6292	Fax:	Phone: 630-407-6300	Fax: 630-407-6301
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Marsh & McLennan Agency, LLC	Vendor#: 27831	Dept: Human Resources	Division:
Attn:	Email:	Attn:	Email: dpchumanresources@dupagecounty.gov
Address: 62886 Collection Center Drive	City: Chicago	Address: 421 N. County Farm Rd	City: Wheaton
State: IL	Zip: 60693-0828	State: IL	Zip: 60187
Phone: 763-746-8000	Fax:	Phone: 630-407-6300	Fax: 630-407-6301
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Apr 1, 2026	Contract End Date (PO25): Mar 31, 2029

**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	N/A	Health & Wellness Benefits Consulting Services		1000	1200	53090		600,000.00	600,000.00
<b><i>FY is required, ensure the correct FY is selected.</i></b>										Requisition Total	\$ 600,000.00

*Comments*

HEADER COMMENTS	Provide comments for P020 and P025. Contract Purchase Order with Marsh & McLennan Agency for consulting services to assist the County in the evaluation of its health and wellness benefits program administration per request for proposal 25-012-HR. This is an initial 3-year contract with a 1-year optional renewal.
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.