



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#: 26-1224	RFP, BID, QUOTE OR RENEWAL #: 26-019-HR	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$0.00
COMMITTEE: FINANCE	TARGET COMMITTEE DATE: 04/28/2026	PROMPT FOR RENEWAL: 6 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$0.00
	CURRENT TERM TOTAL COST: \$0.00	MAX LENGTH WITH ALL RENEWALS: FIVE YEARS*	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: The International City Mgmt Asso Retirement Corp d/b/a Mission Square Retirement	VENDOR #:	DEPT: Human Resources	DEPT CONTACT NAME: Christine Clevenger
VENDOR CONTACT: Raymond Fortin	VENDOR CONTACT PHONE: 202-962-4600	DEPT CONTACT PHONE #: 630-407-6228	DEPT CONTACT EMAIL: christine.clevenger@dupagecounty.gov
VENDOR CONTACT EMAIL: RFortin@missionsq.org	VENDOR WEBSITE: missionsq.org	DEPT REQ #: N/A	
<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.). A Request for Proposal (RFP) was issued to procure a 457 tax advantaged deferred-compensation plan for County employees. There is no cost to the County as the cost is born by plan participants. This will be a three-year agreement with two optional renewals.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The County's 457 tax advantaged deferred-compensation retirement plan provides County employees with one provider which helps to drive down the investment related fees and allow for better outreach and communication for current and potential participants. This directly benefits our participants/employees. Fiduciary services, under section 3(21) of the Employee Retirement Income Security Act of 1974, will allow the County to delegate the investment option selection, monitoring, analysis, and replacement, lowering the County's liability. Regular updates will be provided as well as quarterly meetings and an annual Board update.			

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 lowest, responsible bidder. Four submittals were reviewed and scored. The review team finalized the selection through consensus.
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 Mission Square to provide consolidated 457 tax advantaged deferred-compensation administration. Alternatives: 1) Select and recommend another 457 retirement plan administrator from the RFP shortlist. 2) Release a new RFP.

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: The International City Mgmt Asso Retirement Corp d/b/a Mission Square Retirement	Vendor#:	Dept: Human Resources	Division: N/A
Attn: Raymond Fortin	Email: RFortin@missionsq.org	Attn: N/A	Email: dpchumanresources@ dupagecounty.gov
Address: 777 N Capitol St, NE Suite 600	City: Washington	Address: 421 N County Farm Rd	City: Wheaton
State: DC	Zip: 20002	State: IL	Zip: 60187
Phone: 202-962-4600	Fax:	Phone: 630-407-6300	Fax: 630-407-6301
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: The International City Mgmt Asso Retirement Corp d/b/a Mission Square Retirement	Vendor#:	Dept: Human Resources	Division: N/A
Attn:	Email:	Attn: N/A	Email: dpchumanresources@ dupagecounty.gov
Address: 777 N Capitol St, NE Suite 600	City: Washington	Address: 421 N County Farm Rd	City: Wheaton
State: DC	Zip: 20002	State: IL	Zip: 60187
Phone: 202-962-4600	Fax:	Phone: 630-407-6300	Fax: 630-407-6301
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Jul 8, 2026	Contract End Date (PO25): Jul 7, 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	457 deferred-compensation plan							0.00
<i>FY is required, ensure the correct FY is selected.</i>										Requisition Total	\$ 0.00

Comments

HEADER COMMENTS	Provide comments for P020 and P025. Contract Purchase Order with Mission Square for 457 tax advantaged deferred-compensation administration services per request for proposal 26-019-HR. This is a 3-year agreement with two 1-year optional renewals.
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.