



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#: 25-2859	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$22,950.00
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 11/25/25 - Discharging at Finance	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$22,950.00
	CURRENT TERM TOTAL COST: \$22,950.00	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: EPM Pros Inc. d/b/a/Bakerfield Solutions	VENDOR #:	DEPT: Information Technology	DEPT CONTACT NAME: Roy Clancy
VENDOR CONTACT: Mark Cawi	VENDOR CONTACT PHONE:	DEPT CONTACT PHONE #: 630-407-5015	DEPT CONTACT EMAIL: roy.clancy@dupagecounty.gov
VENDOR CONTACT EMAIL: mark.cawi@bakerfieldsolutions.com	VENDOR WEBSITE:	DEPT REQ #:	
<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.). Professional services to implement reconciliation software Adra by Trintech to optimize bank statements to the ERP system, per 55 ILCS 5/5-1022 'Competitive Bids' (D) IT/Telecom Purchases Under \$35,000.00.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The implementation services by Bakerfield is necessary since internal staff due not have the expertise with the implementation of these services. These services will ensure the implementation proceeds on time and on a set budget.			

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. PER 55 ILCS 5/5-1022 'COMPETITIVE BIDS' (D) IT/TELECOM PURCHASES UNDER \$35,000.00
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

SECTION 3: DECISION MEMO	
SOURCE SELECTION	Describe method used to select source.
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).

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: EPM Pros Inc. d/b/a/Bakerfield Solutions	Vendor#:	Dept: IT	Division:
Attn: Mark Cawi	Email: mark.cawi@bakerfieldsolutions.com	Attn: Sarah Godzicki	Email: ITAP@dupagecounty.gov
Address: 550 Congressional Blvd, Suite 115 - #1007	City: Carmel	Address: 421 N. County Farm Road	City: Wheaton
State: IN	Zip: 46032	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5037	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: EPM Pros Inc. d/b/a/Bakerfield Solutions	Vendor#:	Dept: IT	Division:
Attn:	Email:	Attn: Roy Clancy	Email: roy.clancy@dupagecounty.gov
Address: 550 Congressional Blvd, Suite 115 - #1007	City: Carmel	Address: 421 N. County Farm Road	City: Wheaton
State: IN	Zip: 46032	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5015	Fax:
<i>Shipping</i>		<i>Contract Dates</i>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Nov 26, 2025	Contract End Date (PO25): Nov 30, 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	102	HR		Implementation Services	FY26	1000	1110	53020		225.00	22,950.00
FY is required, ensure the correct FY is selected.										Requisition Total	\$ 22,950.00

Comments	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Please send PO to Sarah Godzicki & Roy Clancy and copy both when emailing to vendor.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO. Discharge Technology Committee at 11/25/2025 Finance Meeting.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.