



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#: 25-0186	RFP, BID, QUOTE OR RENEWAL #: RFP #24-064-FIN	INITIAL TERM WITH RENEWALS: 3 YRS + 1 X 1 YR TERM PERIOD	INITIAL TERM TOTAL COST: \$22,500.00
COMMITTEE: FINANCE	TARGET COMMITTEE DATE: 01/14/2024	PROMPT FOR RENEWAL: 6 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$30,000.00
	CURRENT TERM TOTAL COST: \$22,500.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: MAXIMUS US SERVICES, INC	VENDOR #: 45127	DEPT: Finance	DEPT CONTACT NAME: Jim Morrissy
VENDOR CONTACT: Lucas Williamson	VENDOR CONTACT PHONE: 217-725-2836	DEPT CONTACT PHONE #: 630-407-6116	DEPT CONTACT EMAIL: Jim.Morrissy@dupagecounty.gov
VENDOR CONTACT EMAIL: LucasWilliamson@maximus.com	VENDOR WEBSITE: maximus.com	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.). Assistance in preparing the federally accepted Cost Allocation Plan. The County uses the information from its internal cost reporting system to aid in the preparation of the annual cost allocation plan. The County has completed a federally accepted cost allocation plan each year since 1979.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The annual County Cost Allocation Plan is prepared according to federal regulations and is required for reimbursement of costs from federal grants.			

**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. RFP #24-064-FIN
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. Proceed with issuing a PO to Maximus US Services, Inc. as this is in the best interest for the County. 2. Pursue a different vendor with a new RFP. 3. Do not pursue a vendor for assisting with the County's Cost Allocation Plan.

## 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: MAXIMUS US SERVICES, INC	Vendor#: 45127	Dept: DuPage County	Division: Finance
Attn: Lucas Williamson	Email: LucasWilliamson@maximus.com	Attn: Jim Morrissy	Email: Jim.Morrissy@dupagecounty.gov
Address: 2309 West White Oaks Dr	City: Springfield	Address: 421 N County Farm Rd	City: Wheaton
State: Illinois	Zip: 62704	State: IL	Zip: 60187
Phone: 217-725-2836	Fax:	Phone: 630-407-6116	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Maximus US Services, Inc	Vendor#: 45127	Dept: DuPage County	Division: Finance
Attn:	Email:	Attn: Jim Morrissy	Email: Jim.Morrissy@dupagecounty.gov
Address: PO BOX 791188	City: Baltimore	Address: 421 N County Farm Rd	City: Wheaton
State: MD	Zip: 21279-1188	State: IL	Zip: 60177
Phone:	Fax:	Phone:	Fax:
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): 01/14/2025	Contract End Date (PO25): 11/30/2027

**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		Fiscal Year 2024 Cost Allocation Plan	FY25	1000	1150	53000		7,500.00	7,500.00
2	1	EA		Fiscal Year 2025 Cost Allocation Plan	FY26	1000	1150	53000		7,500.00	7,500.00
3	1	EA		Fiscal Year 2026 Cost Allocation Plan	FY27	1000	1150	53000		7,500.00	7,500.00
<b><i>FY is required, ensure the correct FY is selected.</i></b>										Requisition Total	\$ 22,500.00

<i>Comments</i>	
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.
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.