



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#: 26-1520	RFP, BID, QUOTE OR RENEWAL #: 25-028-FM	INITIAL TERM WITH RENEWALS: 1 YR + 3 X 1 YR TERM PERIODS	INITIAL TERM TOTAL COST: \$23,500.00
COMMITTEE: PUBLIC WORKS	TARGET COMMITTEE DATE: 06/02/2026	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$94,000.00
	CURRENT TERM TOTAL COST: \$23,500.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: FIRST RENEWAL
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Baker Tilly Advisory Group Parent, LP	VENDOR #:	DEPT: Facilities Management	DEPT CONTACT NAME: Cathie Figlewski
VENDOR CONTACT: Jesse Nelson	VENDOR CONTACT PHONE: 517-336-3951	DEPT CONTACT PHONE #: X5665	DEPT CONTACT EMAIL: catherine.figlewski@dupagecounty.gov
VENDOR CONTACT EMAIL: jesse.nelson@bakertilly.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.). Recommendation for the approval of a contract to Baker Tilly Advisory Group Parent, LP, to provide accounting services and support related to the Pursuit of the Federal Renewable Energy Tax Credit as part of the Inflation Reduction Act 2022, for Facilities Management, for the period June 17, 2026 through June 16, 2027, for a total contract amount not to exceed \$23,500, per RFP#25-028-FM, first of three options to renew.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The Phase II solar array installation at the JTK Building is currently under construction and eligible under the Inflation Reduction Act (IRA) for a credit/ rebate of 40% of the project cost. The forecast expenditure from the County Infrastructure fund for the project is \$504,612 which would be approximately \$201,845 in rebate/credit for the county. County staff does not have the experience or expertise to file the correct documents and requires professional accounting services and support to obtain this rebate/credit from the Federal government.			

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.
RENEWAL OF RFP	

SECTION 3: DECISION MEMO

SOURCE SELECTION	Describe method used to select source. RFP#25-028-FM was released to the public on 1/23/24. Four vendors submitted proposals and those proposals were evaluated in four categories. Baker Tilly Advisory Group Parent, LP met the criteria and was rated the highest points.
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) Approve a contract to Baker Tilly Advisory Group Parent, LP due to their experience and expertise in this matter. 2) Do not approve a contract to Baker Tilly Advisory Group Parent, LP . 3) Perform services in-house. Department does not have qualified staff with experience or expertise to provide this service in-house.

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: Baker Tilly Advisory Group Parent, LP	Vendor#:	Dept: Facilities Management	Division:
Attn: Jesse Nelson	Email: jesse.nelson@bakertilly.com	Attn:	Email: FMAccountsPayable@dupagecounty.gov
Address: PO Box 7398	City: Madison	Address: 421 N. County Farm Road	City: Wheaton
State: WI	Zip: 53707-7398	State: IL	Zip: 60187
Phone: 517-336-3951	Fax:	Phone: 630-407-5700	Fax: 630-407-5701
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor:	Vendor#:	Dept: Facilities Management	Division:
Attn:	Email:	Attn:	Email:
Address:	City:	Address: 421 N. County Farm Road	City: Wheaton
State:	Zip:	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5700	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Jun 17, 2026	Contract End Date (PO25): Jun 16, 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	LO		Accounting Services	FY26	1000	1100	53000		23,500.00	23,500.00
<i>FY is required, ensure the correct FY is selected.</i>										Requisition Total	\$ 23,500.00

Comments

HEADER COMMENTS	Provide comments for P020 and P025. Provide accounting services and support related to the Pursuit of the Federal Renewable Energy Tax Credit as part of the Inflation Reduction Act 2022, for Facilities Management.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Send PO to Cathie Figlewski, Brian Rovik, & Clara Gomez
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO. PW: 6/2/26
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.