



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#: 25-0664	RFP, BID, QUOTE OR RENEWAL #: 25-028-FM	INITIAL TERM WITH RENEWALS: 1 YR + 3 X 1 YR TERM PERIODS	INITIAL TERM TOTAL COST: \$16,370.00
COMMITTEE: PUBLIC WORKS	TARGET COMMITTEE DATE: 03/18/2025	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$65,480.00
	CURRENT TERM TOTAL COST: \$16,370.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Wipfli LLP	VENDOR #:	DEPT: Facilities Management	DEPT CONTACT NAME: Cathie Figlewski
VENDOR CONTACT: George Persekian	VENDOR CONTACT PHONE: 312-205-0977	DEPT CONTACT PHONE #: X5665	DEPT CONTACT EMAIL: catherine.figlewski@dupagecounty.gov
VENDOR CONTACT EMAIL: gpersekian@wipfli.com	VENDOR WEBSITE:	DEPT REQ #:	

### Overview

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 Wipfli LLP, 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 March 18, 2025 through March 17, 2026, for a total contract amount not to exceed \$16,370, per RFP#25-028-FM.

JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished  
The Phase I solar array installation at the JTK Building that was completed in 2024 is currently eligible under the Inflation Reduction Act (IRA) for a credit/rebate of 40% of the project cost. The total expenditure of the project is \$423,468 which would be approximately \$169,000 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.  
RFP (REQUEST FOR PROPOSAL)

## 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. Wipfli LLP 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 Wipfli LLP due to their experience and expertise in this matter. 2) Do not approve a contract to Wipfli LLP. 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

<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: Wipfli LLP	Vendor#:	Dept: Facilities Management	Division:
Attn: George Persekian	Email: GPersekian@wipfli.com	Attn:	Email: FMAccountsPayable@dupagecounty.gov
Address: 500 N. First St., Ste 7000 PO BOX 8010	City: Wausau	Address: 421 N. County Farm Road	City: Wheaton
State: Wi	Zip: 54403	State: IL	Zip: 60187
Phone: 312-205-0977	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): Mar 18, 2025	Contract End Date (PO25): Mar 17, 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	1	LO		Accounting Services	FY25	1000	1100	53000		15,370.00	15,370.00
2	1	LO		Contingency	FY26	1000	1100	53000		1,000.00	1,000.00
<b><i>FY is required, ensure the correct FY is selected.</i></b>										Requisition Total	\$ 16,370.00

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, Mary Ventrella, & Clara Gomez
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO. PW: 3/18/25
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.