Procurement Review Comprehensive Checklist
Procurement Services Division
This form must accompany all Purchase Order Requisitions

SECTION 1: DESCRIPTION

General Tracking		*Contract Terms*	
FILE ID#: FI-P-0011-25	RFP, BID, QUOTE OR RENEWAL #: 24-098-FIN	INITIAL TERM WITH RENEWALS: 1 YR + 3 X 1 YR TERM PERIODS	INITIAL TERM TOTAL COST: $65,000.00
COMMITTEE: FINANCE	TARGET COMMITTEE DATE: 10/28/2025	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: $260,000.00
	CURRENT TERM TOTAL COST: $65,000.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: FIRST RENEWAL

Vendor Information		*Department Information*	
VENDOR: Nugent Consulting Group, LLC	VENDOR #: 44763	DEPT: Finance	DEPT CONTACT NAME: Jim Morrissy
VENDOR CONTACT: Michael Nugent	VENDOR CONTACT PHONE: 847-412-0410	DEPT CONTACT PHONE #: 630-407-6116	DEPT CONTACT EMAIL: jim.morrissy@dupagecounty.gov
VENDOR CONTACT EMAIL: Nugentllc@comcast.net	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.).
Nugent Consulting Group (NCG) will provide risk management consulting services, including but not limited to, ensuring County compliance with risk management policies, procedures and protocols. Review of insurance policies, contracts, and Certificates of Insurance for adequate coverage. Gather loss information, address rick exposures, recommend steps for resolution, and perform risk assessments.

JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished
Risk management consulting services will ensure compliance with state and federal laws, in addition to maximizing the reduction of safety and County risk.

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 RENEWAL OF RFP	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. RFP #24-098-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). Recommendation to renew contract with Nugent Consulting Group to provide consulting. An alternative would be to do nothing or hire a full-time employee to provide the same service at a higher cost.

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			
Send Purchase Order To:		*Send Invoices To:*	
Vendor: Nugent Consulting Group, LLC	Vendor#: 44763	Dept: Finance	Division: Risk
Attn: Michael Nugent	Email: Nugentllc@comcast.net	Attn: Jim Morrissy	Email: Jim.Morrissy@dupagecounty.gov
Address: 2409 Peachtree Lane	City: Northbrook	Address: 421 N. COUNTY FARM ROAD	City: Wheaton
State: IL	Zip: 60062	State: IL	Zip: 60187
Phone: 847-412-0410	Fax: 847-919-3805	Phone: 630-407-6116	Fax:
Send Payments To:		***Ship to:***	
Vendor: Nugent Consulting Group, LLC	Vendor#: 46130	Dept:	Division:
Attn: Michael Nugent	Email: Nugentllc@comcast.net	Attn:	Email:
Address: 2409 Peachtree Lane	City: Northbrook	Address:	City:
State: IL	Zip: 60062	State:	Zip:
Phone: 847-412-0410	Fax: 847-919-3805	Phone:	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Dec 1, 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	1	EA		FY26	FY26	1100	1212	53090		65,000.00	65,000.00
FY is required, ensure the correct FY is selected.										Requisition Total	$ 65,000.00

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.
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.