



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

SECTION 1: DESCRIPTION

General Tracking		Contract Terms	
FILE ID#:	RFP, BID, QUOTE OR RENEWAL #: RFP# 23-024-CB	INITIAL TERM WITH RENEWALS:	INITIAL TERM TOTAL COST: \$79,600.00
COMMITTEE: STRATEGIC PLAN	TARGET COMMITTEE DATE: 03/21/2023	PROMPT FOR RENEWAL:	CONTRACT TOTAL COST WITH ALL RENEWALS: \$79,600.00
	CURRENT TERM TOTAL COST: \$79,600.00	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
Vendor Information		Department Information	
VENDOR: BerryDunn	VENDOR #:	DEPT: County Board	DEPT CONTACT NAME: Jason Blumenthal
VENDOR CONTACT: Seth Hedstrom	VENDOR CONTACT PHONE: 207-541-2212	DEPT CONTACT PHONE #: 630-407-6143	DEPT CONTACT EMAIL: Jason.Blumenthal@dupageco.org
VENDOR CONTACT EMAIL: shedstrom@berrydunn.com	VENDOR WEBSITE: berrydunn.com	DEPT REQ #: 23-024 CB	
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.). In order to update the DuPage County Strategic Plan a third-party is needed to hear feedback from internal and external stakeholders on the vision for the County moving forward. To do such a contractor must be hired to coordinate all of these efforts. This vendor will work to survey the community, facilitate strategic planning sessions with elected officials and staff, and craft a final strategic plan for County Board approval. The County budgeted \$80,000 for this matter in the FY23 budget. An RFP was released and various entities submitted proposals. After interview's and scoring of the vendors, BerryDunn was selected to coordinate and produce a new strategic plan for \$79,600. This will be a one year contract.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The County Strategic Plan has been enacted for more than five years and requires updates to meet the current needs of the County. Hiring an outside firm to assist in the writing and creation of a new Strategic Plan is necessary. To ensure that generally accepted strategic planning principles are used, BerryDunn will assist in coordinating surveys with the public, board members, and internal stakeholders to find an all encompassing strategic plan for the future of the County. At the end of this process the County Board will vote on the final product and determine the guiding principles for the next five years of the County.			

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

STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact. QUALITY OF LIFE
SOURCE SELECTION	Describe method used to select source. A Request for Proposal was sent out. Firms were interviewed and scored.
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. The County Board can decide not to award a contract and not update the current strategic plan. 2. The County Board can decide to have staff update the strategic plan.

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: BerryDunn	Vendor#:	Dept: County Board Office	Division:
Attn: Seth Hedstrom	Email: shedstrom@berrydunn.com	Attn: Jason Blumenthal	Email: Jason.Blumenthal@dupageco.org
Address: 2211 Congress Street	City: Portland	Address: 421 N. County Farm Road	City: Wheaton
State: Maine	Zip: 04102	State: Illinois	Zip: 60187
Phone: 207-541-2212	Fax:	Phone: 630-407-6143	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: BerryDunn	Vendor#:	Dept: County Board Office	Division:
Attn: Seth Hedstrom	Email: shedstrom@berrydunn.com	Attn: Jason Blumenthal	Email: Jason.Blumenthal@dupageco.org
Address: 2211 Congress Street	City: Portland	Address: 421 N. County Farm Road	City: Wheaton
State: Maine	Zip: 04102	State: Illinois	Zip: 60187
Phone: 207-541-2212	Fax:	Phone: 630-407-6143	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Mar 28, 2023	Contract End Date (PO25): Mar 28, 2024
Contract Administrator (PO25):			

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		Strategic Plan Consultant	FY23	1000	1001	53080		79,600.00	79,600.00
FY is required, assure the correct FY is selected.										Requisition Total	\$ 79,600.00

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.

The following documents have been attached: ☐ W-9 ☒ Vendor Ethics Disclosure Statement