

AMENDMENT OF SOLICITATION / MODIFICATION OF CONTRACT			1. Solicitation Number CFOPD-25-I-017		Page of Pages 1 Attachments		
2. Amendment/Modification Number Amendment No. 1		3. Effective Date See Box 16C		4. Requisition/Purchase Request No.		5. Solicitation Caption Actuary Services	
6. Issued by: Code _____ Office of the Chief Financial Officer Office of Contracts 1100 4 th Street SW Suite E610 Washington, DC 20024				7. Administered by (If other than line 6)			
8. Name and Address of Contractor (No. street, city, county, state and zip code) ALL POTENTIAL OFFERORS Code _____ Facility _____				9A. Amendment of Solicitation No. CFOPD-25-I-017			
				9B. Dated (See Item 11) February 3, 2025			
				10A. Modification of Contract/Order No.			
				10B. Dated (See Item 13)			
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS							
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended. <input checked="" type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning a <u>1</u> written copy of the amendment: (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) BY separate letter or fax which includes a reference to the solicitation and amendment number. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such may be made by letter or fax, provided each letter or telegram makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.							
12. Accounting and Appropriation Data (If Required)							
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS , IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14							
A. This change order is issued pursuant to (Specify Authority):							
B. The above numbered contract/order is modified to reflect the administrative changes.							
C. This supplemental agreement is entered into pursuant to authority of:							
D. Other (Specify type of modification and authority) Administrative							
E. IMPORTANT: Contractor <input type="checkbox"/> is not <input type="checkbox"/> is required to sign this document and return 1 copy to the issuing office.							
14. Description of Amendment/Modification (Organized by UCF Section headings, including solicitation/contract subject matter where feasible.) <p style="text-align: center;">The above referenced solicitation to provide Actuary Services is hereby amended to reflect the following changes (Attachment A) and response to inquiries received (Attachment B).</p> <p style="text-align: center;">ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED</p>							
Except as provided herein, all terms and conditions of the document is referenced in Item 9A or 10A remain unchanged and in full force and effect.							
15A. Name and Title of Signer (Type or print)				16A. Name of Contracting Officer Anthony A. Stover or Drakus Wiggins			
15B. Name of Contractor (Signature of person authorized to sign)		15C. Date Signed		16B. District of Columbia  (Signature of Contracting Officer)		16C. Date Signed Feb 19, 2025	

Attachment A

The following changes are hereby incorporated into the solicitation.

1. **Section B.2** of the solicitation is hereby deleted and replaced as follows:

B.2 CONTRACT TYPE

The District contemplates the award of an Indefinite Delivery Indefinite Quantity (IDIQ) contract based on Firm Fixed unit prices *with a Firm Fixed price component*.

2. **Section B.6** Price schedule is hereby deleted its entirety and replaced as follows:

B.6 PRICE SHEDULE-IDIQ

B.6.1 The Contractor shall list all positions/staff that may be required to perform tasks related to the resultant contract.

B.6.2 BASE YEAR

CLIN	Professional Category	Firm Fixed Price Unit Hourly Rate
001	Principal Actuary/Project Manager/Task Manager	\$_____/Hour
002	Actuary	\$_____/Hour
003	Consultant/Actuarial Assistant	\$_____/Hour
004		\$_____/Hour
005		\$_____/Hour

B.6.2.1 FIRM FIXED PRICE COMPONENT

CLIN	Description	Firm Fixed Price
006	Transition Fee	\$_____

B.6.3 OPTION YEAR ONE

CLIN	Professional Category	Firm Fixed Price Unit Hourly Rate
101	Principal Actuary/Project Manager/Task Manager	\$_____/Hour
102	Actuary	\$_____/Hour
103	Consultant/Actuarial Assistant	\$_____/Hour
104		\$_____/Hour
105		\$_____/Hour

B.6.4 OPTION YEAR TWO

CLIN	Professional Category	Firm Fixed Price Unit Hourly Rate
201	Principal Actuary/Project Manager/Task Manager	\$_____/Hour
202	Actuary	\$_____/Hour
203	Consultant/Actuarial Assistant	\$_____/Hour
204		\$_____/Hour
205		\$_____/Hour

B.6.5 OPTION YEAR THREE

CLIN	Professional Category	Firm Fixed Price Unit Hourly Rate
301	Principal Actuary/Project Manager/Task Manager	\$_____/Hour
302	Actuary	\$_____/Hour
303	Consultant/Actuarial Assistant	\$_____/Hour
304		\$_____/Hour
305		\$_____/Hour

B.6.6 OPTION YEAR FOUR

CLIN	Professional Category	Firm Fixed Price Unit Hourly Rate
401	Principal Actuary/Project Manager/Task Manager	\$_____/Hour
402	Actuary	\$_____/Hour
403	Consultant/Actuarial Assistant	\$_____/Hour
404		\$_____/Hour
405		\$_____/Hour

Attachment B

Set forth below are the District's responses to Offeror question(s):

Question 1. Is this a new services requirement, or is there a current actuary/contract in place providing guidance, advice, and recommendations to the Office of the Chief Financial Officer ("OCFO")?

Response1. *This is a new requirement.*

Question 2. Given that Section B.5.a) states that the maximum quantity is \$150,000.00, can you verify that Sections H.3 and I.31. do not apply?

Response 2. *Sections H.3 and I.3 are required by law and are only applicable if the contract reaches or exceeds those thresholds.*

Question 3. Will the OCFO consider amending Section H.1 to read "The Contractor shall be responsible to the District for all acts and omissions of the Contractor's employees, agents and subcontractors while performing services under the Contract and the Contractor shall oversee the Contractor's employees, agents and subcontractors performing the services under the Contract."?

Response 3. *This can be discussed during the contract award.*

Question 4. Will the OCFO consider removing Section I.18.F? If not, can you clarify whether our indemnity obligations would apply only with respect to what we do?

Response 4. *This can be discussed during the contract award.*

Question 5. Would the OCFO consider decreasing the minimum limits for Commercial Umbrella or Excess Liability (Section I.30.9) from \$5,000,000 to \$3,000,000?

Response 5. *This can be discussed during the contract award.*

Question 6. Will the OCFO accept a Contractor Performance Assessment Reporting System (CPARS) evaluation in place of the required reference form if a federal client is unable to complete the form? Please let us know if this would be an acceptable alternative.

Response 6. *The District may consider this alternative approach if the evaluation contains the same or similar information.*

Question 7. Please confirm that we are correctly understanding B.6 PRICE SCHEDULE-IDIQ and that we should supply the list of all positions/staff that may be required to perform the tasks identified in SECTION C (B.6.1) and then provide the hourly rate for each such named position for the base year (B.6.2) and the four option years (B.6.3 – B.6.6).

Response 7. ***Yes, the Contractor shall propose the personnel that will perform the services along with the hourly rates for each position. This information will be utilized to evaluate pricing in accordance with Section M of the solicitation.***

Question 8. Would including a brief narrative in our bid submission providing information about our firm and personnel's experience, methodology, and approach related to the IDIQ tasks as described in Section C be permissible?

Response 8. ***Including supporting narratives that reflect the past performance information is allowed. Offerors are required to have Associate or Fellow credentials from the Society of Actuaries and have more than one year's employment in the Offeror's firm per Section C.3.1. and Section L.17.and b.***

Question 9. What is the reason for issuing this RFP?

Response 9. ***The District has a need for actuary services.***

Question 10. Should our proposal include a transition fee to set up our valuation systems and match the enrolled actuary's valuation or will that be included (billed for) in the first request?

Response 10. ***Yes, see the revision to Section B per Attachment A.***

Question 11. Our firm requires a reasonable limit of liability and a hold harmless/indemnification provision in all of its services contracts. Would this requirement prevent our proposal from being considered?

Response 11. ***This can be discussed during the contract award***

Question 12. Our firm holds insurance policies at least equal to the minimum requirements outlined in the RFP. However, we do not add clients as named insureds to our policies. Would this prevent our proposal from being considered?

Response 12. ***Yes, the District must be named as an additional insured per Section I.30.***