

Intent to Award Sole Source Contracts

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| Title | Intent to Award Sole Source Contract Extension-Determination and Findings |
| Notice Date | September 10, 2013 |
| Response Due Date | September 20, 2013 |
| Contract Number | CFOPD-07-C-026D |
| Contract Description | Financial Advisory Services Description: The Government of the District of Columbia (District), Office of the Chief Financial Officers, Office of Finance and Treasury has an immediate need for continuing financial advisory services relative to the District's debt obligations, economic development financings, real property, and financing programs. |
| Vendor Name | Phoenix Capital Partners, LLP |
| Procuring Agency | Office of the Chief Financial Officer, Office of Contracts |
| Point of Contact | Peter Lloyd, Contract Specialist peter.lloyd@dc.gov 202-442-6431 |

**Government of the District of Columbia
Office of the Chief Financial Officer
Determination and Findings
for a
SOLE SOURCE EXTENSION OF CONTRACT**

CONTRACT NUMBER: CFOPD-07-C-026D

CONTRACTOR: Phoenix Capital Partners, LLP

CAPTION: Financial Advisory Services

PROGRAM AGENCY: Office of Finance and Treasury

CONTRACTING AGENCY: Office of Contracts

1. AUTHORIZATION

D.C. Official Code §2-354.04; 27 DCMR 1304, 1700, 1701 and 2005.6(b)

2. MINIMUM NEED

The Government of the District of Columbia (District), Office of the Chief Financial Officers, Office of Finance and Treasury has an immediate need for continuing financial advisory services.

3. ESTIMATED REASONABLE PRICE

The contract extension period is from October 1, 2013 through January 31, 2014. Funds shall be obligated at the time orders are issued by the District under the contract. The contractor's pricing was determined fair and reasonable at the time of contract award. The contractor shall maintain its pricing for the extension period.

4. FACTS WHICH JUSTIFY SOLE SOURCE PROCUREMENT

Phoenix Capital Partners, LLP was awarded Contract No. CFOPD-07-C-026D to provide financial advisory services, on an as-needed basis for the Office of Finance and Treasury, the Office of Economic Development Finance, and the Office of the Deputy Mayor for Planning and Economic Development. The contract term ends September 30, 2013.

In preparation for a replacement contract, the Office of Finance and Treasury has developed requirements based on new District initiatives, latest trends in the financial marketplace, and relevant federal legislative changes. The Office of Finance and Treasury is preparing its recommendation of pre-qualified vendors for participation in the second step of the procurement process. Therefore, the anticipated contract effective date

for the replacement contract is February 1, 2014. The District has a critical need for uninterrupted services, as the contractor is available to provide financial advisory services regarding the District's debt obligations, economic development financings, real property, and financing programs. The District requires services on an as-needed basis to timely assist in decision making for ensuring the District's financial stability. The contractor is the uniquely qualified with demonstrated performance and the capacity to provide immediate and consistent services; as such, a market survey was not conducted.

Therefore, it is necessary to extend the contract through January 31, 2014 to allow for continuity of service and to allow time for the completion of the competitive procurement process for a new contract that best meets the District's needs.

5. **CERTIFICATION BY AGENCY HEAD**

I hereby certify that the above findings are true, correct and complete.

Jeffrey Barnette
D.C. Treasurer
Office of Finance and Treasury

Date

6. **CERTIFICATION BY CONTRACTING OFFICER**

I have reviewed the above findings and certify that they are sufficient to justify the sole source extension of this contract under the cited authority. I recommend that the Director approve the sole source extension of this contract.

Drakus Wiggins
Contract Officer
Office of Contracts

Date

DETERMINATION

Based on the above findings and in accordance with the cited authority, I hereby determine that it is not feasible or practical to invoke the competitive solicitation process under either Section 402 or 403 of the District of Columbia Procurement Practices Reform Act of 2010 (D.C. Law 18-371; D.C. Official Code § 2-354.02 or 2-354.03). Accordingly, I determine that it is in the best interest of the District and the District is justified in using the sole source method of procurement to extend the contract term beyond the total term specified in the contract, pursuant to 27 DCMR § 2005.6(b).

Joseph Giddis
Director
Office of Contracts






Date

DRAFT







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| <input type="checkbox"/> |  CFOPD-05-C-904 -Instant Tickets - Notice of Sole Source - DF.pdf View Download | Title: Intent to Award Sole Source Contract Extension-Determination and Findings Instant Tickets Document #: CFOPD-05-C-904 Due Date: November 24, 2012 POC: Carla Roane (email – Carla.Roane@dc.gov or telephone 202-442-6452) | 228k | v. 1 | Nov 14, 2012, 4:22 PM | Drakus Wiggins |
| <input type="checkbox"/> |  CFOPD-05-C-904 - Instant Tickets Products - Notice of Sole Source - DF.pdf View Download | Title: Notice of Intent to Award Sole Source Contract Extension -- Document No.: CFOPD-05-C-904 -- Due Date: February 8, 2013 -- POC: Carla Roane email: Carla.Roane@dc.gov Telephone: 202-442-6452 | 142k | v. 1 | Jan 29, 2013, 4:57 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-07-C-026A - Financial Advisory Services - Notice of Sole Source D&F.pdf View Download | Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Financial Advisory Services -- Document #: CFOPD-07-C-026A -- Due Date: September 20, 2013 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 156k | v. 1 | Sep 10, 2013, 4:06 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-07-C-026B Financial Advisory Services -Notice to Award Sole Source - D&F.pdf View Download | Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Financial Advisory Services -- Document #: CFOPD-07-C-026B -- Due Date: September 20, 2013 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 156k | v. 1 | Sep 10, 2013, 4:08 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-07-C-026C Financial Advisory Services -Notice to Award Sole Source - D&F.pdf View Download | Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Financial Advisory Services -- Document #: CFOPD-07-C-026C -- Due Date: September 20, 2013 -- POC: Peter Lloyd | 155k | v. 1 | Sep 10, 2013, 4:09 PM | Doretha Johnson (OCFO) |






(email – peter.lloyd@dc.gov or telephone 202-442-6431)

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| <input type="checkbox"/> |  CFOPD-07-C-026D Financial Advisory Services -Notice to Award Sole Source - D&F.pdf View Download | Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Financial Advisory Services -- Document #: CFOPD-07-C-026D -- Due Date: September 20, 2013 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 156k | v. 1 | Sep 10, 2013, 4:10 PM | Doretha Johnson (OCFO) |
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| <input type="checkbox"/> |  CFOPD-07-C-026F - Financial Advisory Services - Notice of Sole Source - D&F.pdf View Download | Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Financial Advisory Services -- Document #: CFOPD-07-C-026F -- Due Date: September 20, 2013 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 155k | v. 3 | Sep 10, 2013, 4:14 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-07-C-056 - Universal COllection Services - Notice of Sole Source - DF - May June 2013.pdf View Download | Title: Intent to Award Sole Source Contract -- Determination & Findings for Universal Collection Services -- Document #: CFOPD-07-C-056 - - Due Date: April 25, 2013 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 105k | v. 1 | Apr 15, 2013, 1:47 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-07-C-056 - Universal Collection Services - Notice of Sole Source - DF.pdf View Download | Title: Intent to Award Sole Source Contract -- Determination & Findings for Universal Collection Services -- Document #: CFOPD-07-C-056 - - Due Date: December 21, 2012 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 130k | v. 1 | Apr 15, 2013, 1:47 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-08-C-009A - Copier | Title: Intent to Award Sole | 100k | v. 1 | Aug 8, 2013, 1:30 PM | Doretha Johnson |

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| | | Services - Notice of Sole Source - DF.pdf View Download | Source Contract Extension - Determination and Findings for Copier Services -- Document #: CFOPD-08-C-009A -- Due Date: August 16, 2013 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | | | | (OCFO) |
| <input type="checkbox"/> |  | CFOPD-08-C-009B - Copier Services - Notice of Sole Source - DF.pdf View Download | Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Copier Services -- Document #: CFOPD-08-C-009B -- Due Date: August 16, 2013 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 96k | v. 1 | Aug 6, 2013, 5:16 PM | Drakus Wiggins |
| <input type="checkbox"/> |  | CFOPD-08-C-028 - Cost Allocation Plan - Notice of Intent Sole Source - DF.pdf View Download | Title: Notice of Intent to Award Sole Source Contract Extension -- Document No.: CFOPD-08-C-028 -- Due Date: July 17, 2013 -- POC: Carla Roane email: Carla.Roane@dc.gov Telephone: 202-442-6452 | 101k | v. 1 | Jul 8, 2013, 4:44 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  | CFOPD-08-C-031A - Medicaid Audit Services - Notice of Sole Source - DF.docx View Download | DF -- CFOPD-08-C-031A -- Medicaid Audit Services -- Notice of Sole Source | 24k | v. 1 | Apr 23, 2013, 11:25 AM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  | CFOPD-08-C-031A - Modification 7 - Sole Source Extension.doc View Download | Modification #7 -- CFOPD-08-C-031A -- Williams, Adley, and Company -- Medicaid Audit Services | 57k | v. 1 | Apr 23, 2013, 11:23 AM | Doretha Johnson (OCFO) |
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| <input type="checkbox"/> |  | CFOPD-08-C-046A Disclosure Counsel Services - Notice of Sole Source Extension & DF.pdf View Download | Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Disclosure Counsel Services -- Document #: CFOPD-08-C-046A -- Due Date: October 7, 2013 -- POC: Anthony Stover | 243k | v. 1 | Sep 27, 2013, 3:48 PM | Drakus Wiggins |

(email – anthony.stover@dc.gov
or telephone 202-442-7122)

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| <input type="checkbox"/> |  CFOPD-09-C-018 - Website Development - Notice of Sole Source Extension & DF.pdf View Download | Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Website Development -- Document #: CFOPD-08-C-018 - - Due Date: October 7, 2013 -- POC: Anthony Stover (email – anthony.stover@dc.gov or telephone 202-442-7122) | 237k | v. 1 | Sep 27, 2013, 3:37 PM | Drakus Wiggins |
| <input type="checkbox"/> |  CFOPD-11-C-033 - Data Warehouse Maintenance - Notice of Sole Source - DF.pdf View Download | Title: Notice of Intent to Award Sole Source Contract Extension -- Document No.: CFOPD-11-C-033 -- Due Date: March 29, 2013 -- POC: Carla Roane email: Carla.Roane@dc.gov Telephone: 202-442-6452 | 38k | v. 1 | Mar 19, 2013, 1:59 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-13-C-001 - Consulting Services - Notice of Sole Source - DF.pdf View Download | Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Consulting Services -- Document #: CFOPD-13-C-001 - - Due Date: October 13, 2012 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 112k | v. 1 | Oct 3, 2012, 9:37 AM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-13-C-002 - Research and Analysis Tax Consultant - Notice of Sole Source - DF.pdf View Download | Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Research and Analysis Tax Consultant -- Document #: CFOPD-13-C-002 -- Due Date: October 13, 2012 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 110k | v. 1 | Oct 11, 2012, 4:45 PM | Doretha Johnson (OCFO) |
| <input type="checkbox"/> |  CFOPD-13-C-014 - Real Estate Analytic Services - Notice of Sole Source - DF.pdf View Download | Title: Intent to Award Sole Source Contract - Determination and Findings for Commercial Real Estate Information and Analytic Services -- Document #: CFOPD-13-C-014 -- Due Date: November 26, 2012 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431) | 230k | v. 1 | Nov 16, 2012, 4:47 PM | Drakus Wiggins |
| <input type="checkbox"/> |  DCKV-2007-C-0001 -DMV | Title: Intent to Award Sole | 161k | v. 1 | Aug 7, 2013, 4:55 PM | Doretha Johnson |

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| | | Collections Services - Notice of Sole Source D&F.pdf View Download | Source Contract Extension -- Determination and Findings for Lock Box and Collection Services -- Document #: DCKV-2007-C-0001 -- Due Date: August 17, 2013 -- POC: Drakus Wiggins (email – drakus.wiggins@dc.gov telephone 202-442-7121) | | | | (OCFO) |
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| <input type="checkbox"/> |  | RQ811523 - Reconfiguration of OTR Customer Service Call Center - Notice of Intent to Award Sole Source - DF.pdf View Download | Title: Intent to Award Sole Source Procurement Determination and Findings for Reconfiguration of OTR Customer Service Call Center -- Document#: RQ811523 -- Due Date: July 8, 2013 -- POC: Sharon Guilford (email – sharon.guilford@dc.gov) | 18k | v. 1 | Jun 27, 2013, 4:58 PM | Doretha Johnson (OCFO) |
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