

**GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER**

**DETERMINATION AND FINDINGS
FOR
CONTRACTOR'S RESPONSIBILITY**

AGENCY: Office Finance and Treasury (OFT)
CONTRACT NO: CFOPD-23-C-016
CONTRACTOR: NEPC, LLC
CAPTION: OPEB Outsourced Chief Investment Officer Services (OCIO)

1. AUTHORIZATION:

27 DCMR § 2200.4; PPRA § 301 (D.C. Official Code §2-353.01)

2. MINIMUM REQUIREMENTS:

The District of Columbia Office of the Chief Financial Officer, Office of Contracts, on behalf of the Office Finance and Treasury (the "District") is seeking Outsourced Chief Investment Officer ("OCIO") services for the District of Columbia Other Post-Employment Benefits Fund ("OPEB", "Plan", or "Trust Fund").

3. ESTIMATED REASONABLE COST:

The estimated contract total price is not to exceed \$615,000.00.

4. FACTS WHICH JUSTIFY CONTRACTOR'S RESPONSIBILITY:

The contractor has:

- (a) the financial resources adequate to perform the contract;
- (b) the ability to perform the proposed schedules, taking into consideration all existing commercial and governmental business commitments;
- (c) a satisfactory performance record, as depicted in their past performance references;
- (d) a satisfactory record of integrity and business ethics, as depicted in their past performance references;
- (e) a satisfactory record of compliance with the law, including licensing and tax laws, labor laws, civil rights laws and First Source Employment Act;

- (f) the necessary organization, experience, accounting and operational controls, and technical skills, or the ability to obtain them;
- (g) the necessary production, construction, and technical equipment and facilities or the ability to obtain them;
- (h) not exhibited a pattern of overcharging the District;
- (i) the contractor does not have an outstanding debt with the District or Federal government in delinquent status of more than the greater of \$1,000 or 1% of the contract value, up to \$25,000; and
- (j) the contractor is otherwise qualified and is eligible to receive an award under applicable laws and rules.

5. **CERTIFICATION BY THE CONTRACT SPECIALIST:**

I hereby certify that the above findings are correct and complete to the best of my knowledge.

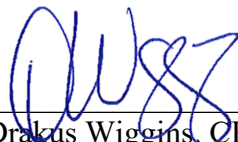
Date

Annmarie R. McQueen
Contract Specialist

DETERMINATION

Based on the above findings, it is hereby determined that the Contractor is responsible in accordance with the applicable regulations set forth above and award of the proposed contract with **NEPC, LLC** is in the best interest of the Government of the District of Columbia.

01/20/2023
Date



Drakus Wiggins, CPPB, CPPO
Contracting Officer