

Intent to Award Sole Source Contracts

Title	Intent to Award Sole Source Contract Extension-Determination and Findings
Notice Date	April 9, 2015
Response Due Date	April 19, 2015
Contract Number	CFOPD-08-C-031B
Contract Description	<p>Medicaid Audit Services</p> <p>Description: The Government of the District of Columbia (District), Department of Health Care Finance (DOH) has an immediate need for the Contractor to continue to provide audit advisory services of Medicaid providers for the Department of Health Care Finance to ensure that payments to Medicaid providers comply with all federal and District laws, regulations, and rules as required by the Comprehensive Annual Financial Report (CAFR) to allow the District to complete a competitive award process for these services.</p>
Vendor Name	Bert Smith and Company
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-08-C-031B

CONTRACTOR: Bert Smith and Company

CAPTION: Medicaid Audit Services

PROGRAM AGENCY: Department of Health Care Finance/Office of the Agency
Fiscal Officer

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 District of Columbia Office of the Chief Financial Officer, Office of Contracts (District) on behalf of the Department of Health Care Finance (DHCF) has an immediate need for the Contractor to continue to provide audit advisory services of Medicaid providers for the Department of Health Care Finance to ensure that payments to Medicaid providers comply with all federal and District laws, regulations, and rules as required by the Comprehensive Annual Financial Report (CAFR).

3. ESTIMATED REASONABLE PRICE

This is an indefinite-quantity contract which requires the District to order and the contractor to furnish at least the stated minimum quantity of services in the amount of \$1,000. The contractor shall also be required to furnish, if and as ordered via task order, any additional quantities, not to exceed a stated maximum of \$325,000.00 for this period. Funds shall be obligated at the time orders are issued under the contract. The contract price is based on the agency's usage and the contractor's rate which was determined as reasonable at the time of contract award based on the competition.

4. **FACTS WHICH JUSTIFY SOLE SOURCE PROCUREMENT**

Bert Smith and Company was awarded Contract No. CFOPD-08-C-031B to provide advisory services of Medicaid providers for the Department of Health Care Finance to ensure that payments to Medicaid providers comply with all federal and District laws, regulations, and rules as required by the Comprehensive Annual Financial Report (CAFR). The contract term ends May 8, 2015.

In preparation for a replacement contract, the Department of Health Care Finance is developing requirements based on latest federal requirements in the Medicaid Audit field. The improved requirements will be procured through a competitive process with an anticipated contract effective date of September 1, 2015. The District has a critical need for uninterrupted availability of services, as federal regulations and laws require audits to be performed on a consistent basis. Bert Smith and Company has 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 August 31, 2015, to allow for continuity of service and to allow time for the completion of the competitive procurement process for a new contract with modern requirements.

5. **CERTIFICATION BY PROGRAM HEAD**

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

Darrin Shaffer
Agency Fiscal Officer
Department of Health Care Finance

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, CPPB, CPPO
Contracting 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).

Dorothy Whisler Fortune, Esq., CPPO
Director
Office of Contracts






Date

DRAFT




Navigation

[Procurement Statutes](#)
[Regulations Guidance](#)
[Master Contract Clauses](#)
[OC Staff Directory](#)
[OCFO Agency Forms](#)
[OCFO Agency Training Materials](#)
[Contractor Requirements](#)
[FY12 Sole Source Procurements](#)
[FY13 Sole Source Procurements](#)
[FY14 Sole Source Procurements](#)
[FY15 Sole Source Procurements](#)
[FY16 Sole Source Procurements](#)
[FY17 Sole Source Procurements](#)
[FY18 Sole Source Procurements](#)
[FY19 Sole Source Procurements](#)
[FY20 Sole Source Procurements](#)
[FY21 Sole Source Procurements](#)
[FY22 Sole Source Procurements](#)
[FY14 Solicitations](#)
[FY15 Solicitations](#)
[FY16 Solicitations](#)
[FY17 Solicitations](#)
[FY18 Solicitations](#)
[Sitemap](#)

FY15 Sole Source Procurements

<input type="checkbox"/>	 CFOPD-05-C-019 - 401(a) ING - Notice of Sole Source - DF2.pdf View Download	Title: Intent to Award Sole Source Contract Determination and Findings for 401(a) Defined Contribution Plan Services Document #: CFOPD-05-C-019 Due Date: February 27, 2015 POC: Anthony Stover (email – anthony.stover@dc.gov or telephone 202-442-7122)	265k	v. 1	Feb 18, 2015, 4:22 PM	Dorothy Whisler (OCFO)
<input type="checkbox"/>	 CFOPD-08-C-031A - Medicaid Audit Services - Williams, Adley & Company, LLP - Notice of Sole Source DF.docx.pdf View Download	Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Medical Audit Services - Document #: CFOPD-08-C-031A - Due Date: April 19, 2015 - POC: Peter Lloyd (email – peter.lloyd@dc.gov telephone 202-442-6431)	3761k	v. 1	Apr 9, 2015, 4:11 PM	Dorothy Whisler (OCFO)
<input type="checkbox"/>	 CFOPD-08-C-031A - Medicaid Audit Services - Williams, Adley & Company, LLP - Notice of Sole Source DF.pdf View Download	Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Medical Audit Services - Document #: CFOPD-08-C-031A - Due Date: April 19, 2015 - POC: Peter Lloyd (email – peter.lloyd@dc.gov telephone 202-442-6431)	3596k	v. 1	May 11, 2015, 9:41 AM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-08-C-031B - Medicaid Audit Services - Bert Smith & Co - Notice of Sole Source DF.pdf View Download	Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Medical Audit Services - Document #: CFOPD-08-C-031B - Due Date: April 19, 2015 - POC: Peter Lloyd (email – peter.lloyd@dc.gov telephone 202-442-6431)	3771k	v. 1	May 11, 2015, 10:00 AM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-08-C-031B - Medicaid Audit Services - Bert Smith & Co - Notice of Sole Source - D&F.pdf View Download	Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Medical Audit Services - Document #: CFOPD-08-C-031B - Due Date: April 19, 2015	3484k	v. 1	May 11, 2015, 10:00 AM	Doretha Johnson (OCFO)






- POC: Peter Lloyd (email – peter.lloyd@dc.gov telephone 202-442-6431)

<input type="checkbox"/>	 CFOPD-08-C-048 - ITS Maintenance Services - Revenue Solutions Inc - Notice of Sole Source Extension and DF.pdf View Download	Title: Intent to Award Sole Source Contract Extension Determination and Findings for ITS Maintenance Services Document #: CFOPD-08-C-048 Due Date: October 13, 2014 POC: Anthony A. Stover (email – anthony.stover@dc.gov or telephone 202-442-7122)	264k	v. 1	Oct 3, 2014, 1:52 PM	Drakus Wiggins
<input type="checkbox"/>	 CFOPD-09-C-004 - Printing and Publication Services - Notice of Sole Source Extension - DF.pdf View Download	Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for Printing and Publication Services -- Document #: CFOPD-09-C-004 -- Due Date: June 23, 2014 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431)	1012k	v. 1	Oct 7, 2014, 4:20 PM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-09-C-004 -Printing Services-Notice of Sole Source Extension.pdf View Download	Title: Intent to Award Sole Source Contract Determination and Findings for Printing Services -- Document #: CFOPD-09-C-004 -- Due Date: March 20, 2015 -- POC: Norman Townsel (email – norman.townsel3@dc.gov or telephone 202-442-6347)	2036k	v. 1	Mar 10, 2015, 5:46 PM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-09-C-014A - 401a, 457b and OPEB Trust Fund Consulting Services - Segal Advisors - Notice of Sole Source D&F.pdf View Download	Title: Intent to Award Sole Source D&F – 401(a) & 457(b) Retirement Plans & Post Retirement Health Benefits Fund Consulting Services - Document #: CFOPD-09-C-014A - Due Date: October 9, 2014 @ 2:00 pm EST - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431)	1060k	v. 1	Sep 30, 2014, 5:02 PM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-09-C-014A - 401(a), 457(b) and OPEB Trust Fund Consulting Services - Segal Advisors - Notice of Sole Source D&F.pdf View Download	Title: Intent to Award Sole Source Extension D&F – Preparation and Compilation of Financial Statements for 401(a) and 457(b) Retirement Plans 529 College Savings Plan - Document #: CFOPD-11-C-013 -	3425k	v. 2	Sep 23, 2015, 2:43 PM	Doretha Johnson (OCFO)






Due Date: October 3, 2015 @
2:00 pm EDT - POC: Peter Lloyd
(email: peter.lloyd@dc.gov or
telephone (202-442-6431))

<input type="checkbox"/>	 CFOPD-09-C-014B - 529 College Savings Plan Consultant Services - Winston Lowe LLC - Notice of Sole Source Extension DF.pdf View Download	Title: Intent to Award Sole Source Contract Extension -- Determination and Findings for 529 College Savings Plan Financial Advisory and Investment Consulting Services -- Document #: CFOPD-09-C-014B -- Due Date: August 20, 2015 -- POC: Peter Lloyd (email – peter.lloyd@dc.gov or telephone 202-442-6431)	3418k	v. 1	Aug 10, 2015, 3:57 PM	Drakus Wiggins
<input type="checkbox"/>	 CFOPD-09-C-023 - Master Trust Custodian Services - State Street Bank Trust - Notice of Sole Source Extension DF.pdf View Download	Title: Intent to Award a Sole Source Extension – Determination and Findings for Master Trust Custodian Services – Document # CFOPD-09-C-023 – Due Date: August 23, 2015 – POC: Peter Lloyd (email – Peter.Lloyd@DC.Gov – telephone 202-442-6431)	3563k	v. 1	Aug 13, 2015, 9:34 AM	Drakus Wiggins
<input type="checkbox"/>	 CFOPD-09-C-034 - Audit Services - FS Taylor - Notice of Sole Source Extension and DF-.pdf View Download	Title: Intent to Award Sole Source Contract Determination and Findings for Lottery Audit Services -- Document #: CFOPD-09-C-034 -- Due Date: November 14, 2014 -- POC: Anthony Stover (email – anthony.stover@dc.gov or telephone 202-442-7122)	265k	v. 1	Nov 5, 2014, 4:43 PM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-10-C-017 - Alias Matching Services - Financial Management Services Investment Corp - Notice of Sole Source Extension DF.pdf View Download	Title: Intent to Award Sole Source Contract Determination and Findings for Alias Matching Services -- Document #: CFOPD-10-C-017 -- Due Date: November 16, 2014 -- POC: Norman Townsel (email – Norman.townsel3@dc.gov or telephone 202-442-6347)	76k	v. 1	Nov 6, 2014, 1:03 PM	Drakus Wiggins
<input type="checkbox"/>	 CFOPD-10-C-039A - Unclaimed Property Examination and Auditing Services - Verus Financial LLC - Notice of Sole Source D&F.pdf View Download	Title: Intent to Award Sole Source D&F – Unclaimed Property Examination and Auditing Services - Document #: CFOPD-10-C-039A - Due Date: May 29, 2015 @ 5:00 pm EDT -	3288k	v. 2	May 19, 2015, 5:04 PM	Doretha Johnson (OCFO)

POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431))

<input type="checkbox"/>	 CFOPD-10-C-040 - Unclaimed Property Management System - Wagers & Associates, Inc. - Intent to Award Sole Source Extension.pdf View Download	Title: Intent to Award a Sole Source Extension – Determination and Findings for Unclaimed Property Management System – Document # CFOPD-10-C-040 - - Due Date: September 12, 2015 -- POC: Peter Lloyd (email – Peter.Lloyd@DC.Gov – telephone 202-442-6431)	3262k	v. 1	Sep 2, 2015, 8:11 AM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-10-C-042 IBM Parts and Products - Intent to Award a Sole Source Extension.pdf View Download	Title: Intent to Award Sole Source Contract Extension - Determination and Findings for IBM Parts and Products - Document #: CFOPD-10-C-042 - Due Date: May 4, 2015 - POC: Crystal Farmer-Linder (email – crystal.farmer-Linder2@dc.gov telephone 202 442-6424)	324k	v. 1	Apr 24, 2015, 4:18 PM	Drakus Wiggins
<input type="checkbox"/>	 CFOPD-10-C-045 - SOAR Hosting and Maintenance - Oracle America Inc - Intent of Award Sole Source Extension DF.pdf View Download	Title: Intent to Award a Sole Source Extension – Determination and Findings for SOAR Hosting and Maintenance – Document # CFOPD-10-C-045 – Due Date: August 17, 2015 – POC: Peter Lloyd (email – Peter.Lloyd@DC.Gov – telephone 202-442-6431)	3423k	v. 1	Aug 7, 2015, 4:45 PM	Drakus Wiggins
<input type="checkbox"/>	 CFOPD-11-C-013 - Preparation and Compilation of Financial Statements for 401(a), 457(b) and 529 Plans - Bert Smith & Co - Notice of Sole Source D&F.pdf View Download	Title: Intent to Award Sole Source Extension D&F – Preparation and Compilation of Financial Statements for 401(a) and 457(b) Retirement Plans 529 College Savings Plan - Document #: CFOPD-11-C-013 - Due Date: October 9, 2015 @ 2:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431))	3582k	v. 1	Sep 29, 2015, 5:12 PM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 CFOPD-11-C-015 - Audit of 529 Plan and Prep of OPEB Financial Statements - Regis & Associates - Notice of Sole Source D&F.pdf View Download	Title: Intent to Award Sole Source Extension D&F – Preparation and Compilation of Financial Statements for OPEB (Other Post Employment Benefits) Trust and Audit of the	3592k	v. 1	Sep 29, 2015, 5:14 PM	Doretha Johnson (OCFO)

Financial Statements for the 529 College Savings Plan - Document #: CFOPD-11-C-015 - Due Date: October 9, 2015 @ 2:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431))

<input type="checkbox"/>	 DCKV-2007-C-0001 - Lockbox and Collection Services - Notice of Sole Source DF .pdf View Download	Title: Intent to Award Sole Source Contract Extension – Determination and Findings for Lock Box and Collection Services Document No.: DCKV-07-C-0001 Due Date: August 21, 2015 POC: Carla Roane email: Carla.Roane@dc.gov Telephone: 202-442-6452	2196k	v. 1	Aug 11, 2015, 4:20 PM	Drakus Wiggins
<input type="checkbox"/>	 Intent to Award Sole Source - RQ882723.pdf View Download	Determination and Findings for Property Management Services – Document # RQ882723 –Due Date January 19, 2015 – POC: Sharon Guilford (email – Sharon.guilford@dc.gov or telephone 202-442-8070).	47k	v. 1	Jan 14, 2015, 12:50 PM	Dorothy Whisler (OCFO)
<input type="checkbox"/>	 PO-GF-2010-C-1089-DJ - UDC Universal Collection Services Secondary - Williams & Fudge Inc - Notice of Sole Source D&F.pdf View Download	Title: Intent to Award Sole Source D&F – University of the District of Columbia Collection Services (Secondary) - Document #: PO-GF-2010-C-0189-DJ - Due Date: July 17, 2015 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone 202-442-6431)	3437k	v. 1	Jul 7, 2015, 3:18 PM	Drakus Wiggins
<input type="checkbox"/>	 PO-GF-2010-C-1090-DJ - UDC Universal Collection Services Primary - ConServe - Notice of Sole Source DF.pdf View Download	Title: Intent to Award Sole Source D&F – University of the District of Columbia Collection Services - Document #: PO-GF-2010-C-0190-DJ - Due Date: June 13, 2015 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431))	3430k	v. 1	Jun 3, 2015, 3:50 PM	Drakus Wiggins
<input type="checkbox"/>	 PO-GF-2010-C-1090-DJ - UDC Universal Collection Services Primary - ConServe - Notice of Sole Source D&F.pdf View Download	Title: Intent to Award Sole Source D&F – University of the District of Columbia Collection Services - Document #: PO-GF-2010-C-0190-DJ - Due Date: September 18, 2015 @ 5:00 pm	3336k	v. 1	Sep 8, 2015, 12:56 PM	Doretha Johnson (OCFO)

EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431)

<input type="checkbox"/>	 RQ878535 - Professional Services - Intent to Award Sole Source.pdf View Download	Title: Intent to Award Sole Source Procurement – Determination and Findings for Professional Services – Document #: RQ878535 – Due Date: December 13, 2014 – POC: Sharon Guilford (email – Sharon.guilford@dc.gov or telephone 202-442-8070).	51k	v. 1	Dec 3, 2014, 4:54 PM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 RQ883802 - Lease & Maintenance-Xerox - Intent to Award Sole Source.pdf View Download	Title: Intent to Award Sole Source Contract -- Determination and Findings for Lease and Maintenance on Xerox copiers -- Document # RQ883802 -- Due Date February 20, 2015 -- POC: Sharon Guilford (email – Sharon.guilford@dc.gov or telephone 202-442-8070)	1344k	v. 1	Feb 11, 2015, 12:01 PM	Doretha Johnson (OCFO)
<input type="checkbox"/>	 RQ901154 - Intent to Award Sole Source.pdf View Download	Intent to Award Sole Source Procurement – Determination and Findings for network and telephone services – Document # RQ901154 – Due Date August 24, 2015 – POC Sharon.Guilford@dc.gov or telephone 202-442-8070).	57k	v. 1	Aug 14, 2015, 3:08 PM	Dorothy Whisler (OCFO)
<input type="checkbox"/>	 RQ901157 - Intent to Award Sole Source.pdf View Download	Intent to Award Sole Source Procurement – Determination and Findings for Catering Services – Document RQ901157 – Due date August 24, 2015 – POC Sharon Guilford (email – Sharon.Guilford@dc.gov or telephone 202-442-8070).	57k	v. 1	Aug 14, 2015, 3:07 PM	Dorothy Whisler (OCFO)
<input type="checkbox"/>	 RQ901160 - Intent to Award Sole Source.pdf View Download	Intent to Award Sole Source Procurement – Determination and Findings for Audio and Video Services – Document # RQ901160 – Due Date August 24, 2015 – POC: Sharon Guilford (email – Sharon.guilford@dc.gov or telephone 202-442-8070).	57k	v. 1	Aug 14, 2015, 3:09 PM	Dorothy Whisler (OCFO)

Comments

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