

Intent to Award Sole Source Contracts

Title	Intent to Award Sole Source Contract Extension-Determination and Findings
Notice Date	March 11, 2022
Response Due Date	March 22, 2022
Contract Number	CFOPD-17-C-019A
Contract Description	<p>Office of Finance and Treasury – 401(a) Defined Contribution Plan and 457 Deferred Compensation Plan Consultant Services</p> <p>Description: The District of Columbia Office of the Chief Financial Officer, Office of Contracts, on behalf of Office of Finance and Treasury (the “District”) has a requirement for a Contractor to provide expert advisory services and project execution assistance for its, 401(a) Defined Contribution Pension Plan and 457 Deferred Compensation Plan.</p>
Vendor Name	Segal Advisors
Procuring Agency	Office of the Chief Financial Officer, Office of Contracts
Point of Contact	Yemarshet Kebede, Contract Specialist Yemarshet.kebede@dc.gov 202-727-6321

**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-17-C-019A

CONTRACTOR: Segal Advisors

CAPTION: Benefits Plans Consultant Services (401(a) and 457

PROGRAM AGENCY: Office of Finance and Treasury (OFT)

CONTRACTING AGENCY: Office of Contracts

1. AUTHORIZATION

Financial Management and Control Order No.15-14 section 1018.

2. MINIMUM NEED

The District of Columbia, Office of the Chief Financial Officer (OCFO), has an on-going requirement for a Contractor to provide expert advisory services and project execution assistance for its 401(a) Defined Contribution Pension Plan and 457 Deferred Compensation Plan.

3. ESTIMATED REASONABLE PRICE

The estimated fair and reasonable contract amount for this extension period from April 27, 2022, through April 26, 2023, is Not to Exceed \$900,000.00 dollars. The Contractor's pricing was determined fair and reasonable based on market research and historical data gathered and analyzed by the Office of Finance and Treasury (OFT).

4. FACTS WHICH JUSTIFY SOLE SOURCE EXTENSION OF CONTRACT

Segal Advisors is the incumbent Contractor and has satisfactorily provided the required services for five (5) years under Contract CFOPD-17-C-019A. The contract was awarded on April 27, 2017, with a one (1) year base period and four (4) one (1) year option periods.

It is imperative that this contract be extended to ensure that the services provided, such as fund performance, Investment Policy Statement, recommendations for managers for the Outsourced Chief Investment Officer, asset allocation, trends in the industry, communications, annual report, etc.) remain in place and uninterrupted.

The incumbent contractor, Segal Advisors, is the only contractor with historic knowledge and the capacity to provide continuous and uninterrupted services for the various 40(a) and 457 Benefit plans Consultancy services at this time. Sufficient time must be allowed for the development and processing of a new procurement for these services as well as ample time for a smooth transition to a new vendor with updated and advanced services capabilities. In order to facilitate this new acquisition and maintain uninterrupted Benefit plans Consultancy services, the contract shall be extended through April 26, 2023.

The Office of the Chief Financial Officer has a critical need to maintain uninterrupted Benefit plans Consultancy services, furnished and administered by Segal Advisors are an intrinsic and integral part of the OCFO's commitment to the District employees and it is critical that they are continuous and sustained.

As a result of the foregoing, it is necessary and prudent to extend Contract CFOPD-17-C-019A through April 26, 2023, to allow for continuity of services, execution of a new contract award and potential transition to a new contractor.

5. CERTIFICATION BY AGENCY HEAD

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

Carmen Pigler
Deputy Chief Financial Officer and Treasurer

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 this sole source extension of this contract.

Anthony A. Stover, CPPO
Contracting Officer

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 1019 or 1020 of the Financial Management and Control Order No. 15-14. 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 Financial Management and Control Order No. 15-14 Section 1018.

Dorothy B. Whisler Fortune, Esq., CPPO
Director of the Office of Contracts
OCFO Chief Procurement Officer

Date

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<input type="checkbox"/>	 22-C-027 - Intent to Award Sole Source and DF.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – Bloomberg Professional Subscription Services Document: I was not provided with a RK # Due Date: July 31, 2022 @ 5:00 pm POC: Annmarie McQueen, Contract Specialist Annmarie.mcqueen@dc.gov (202) 442-6428	150k	v. 1	Jul 22, 2022, 9:46 AM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 Notice of Intent and DF for Sole Source - Contract CFOPD-12-C-016 - UDC Trust Fund Investment Mgmt Svcs - Stifel.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – UDC Endowment Investment Management services - Document #: CFOPD-12-C-016 - Due Date: July 16, 2022 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431)	206k	v. 1	Jul 6, 2022, 9:28 AM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 Notice of Intent and DF for Sole Source - Contract CFOPD-15-C-015 - Call Center Upgrade S&M - Aspect.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – Call Center Upgrade, Maintenance and Support Services - Document #: CFOPD-15-C-015- Due Date: March 28, 2022 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431)	205k	v. 1	Mar 18, 2022, 1:57 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 Notice of Intent and DF for Sole Source - Contract CFOPD-16-C-044 - WIC Program Mgmt Services - Gainwell Technologies LLC.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – Women’s Infants and Children’s (WIC) Program Management Services - Document #: CFOPD-16-C-044- Due Date: August 14, 2022 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431)	208k	v. 1	Aug 4, 2022, 11:29 AM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 Notice of Intent and DF for Sole	Title: Intent to Award Sole	227k	v. 3	Oct 20, 2021, 3:23 PM	Chrishelle Minor

		Source - Contract CFOPD-17-C-013 - Custody Services - Wells Fargo and Company.pdf View Download	Source Determinations and Findings – Custody Services - Document #: CFOPD-17-C-013- Due Date: October 31, 2021 @ 5:00 pm EST - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431)				(OCFO)
<input type="checkbox"/>		Notice of Intent and DF for Sole Source - Contract CFOPD-17-C-017 - Prepaid Debit Card Svcs - US Bank Corporation.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – Prepaid Debit Card services - Document #: CFOPD-17-C-017 - Due Date: December 31, 2021 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431)	203k	v. 1	Dec 21, 2021, 5:39 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>		Notice of Intent and DF for Sole Source - Contract CFOPD-17-C-019A.pdf View Download	Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Benefits Plans Consultant Services (401(a) and 457) Document #: CFOPD-17-C-019A Due Date: March 22, 2022 POC: Yemarshet Kebede (email – Yemarshet.kebede@dc.gov telephone 202-727-6321)	149k	v. 1	Mar 11, 2022, 2:05 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>		Notice of Intent and DF for Sole Source - Contract CFOPD-17-C-019B.pdf View Download	Title: Intent to Award Sole Source Contract Extension - Determination and Findings for Benefits Plans Consultant Services OPEB (Other Post-Employment Benefits) Document #: CFOPD-17-C-019B Due Date: March 22, 2022 POC: Yemarshet Kebede (email – Yemarshet.kebede@dc.gov telephone 202-727-6321)	150k	v. 1	Mar 11, 2022, 2:06 PM	Chrishelle Minor (OCFO)

Comments

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