

Intent to Award Sole Source Contracts

Title	Intent to Award Sole Source Contract - Determination and Findings
Notice Date	August 14, 2017
Response Due Date	August 24, 2017
Contract Number	CFOPD-17-C-039
Contract Description	<p>529 DC College Savings Plan Post Transition Services</p> <p>Description: The Office of the Chief Financial Officer (“OCFO”) for the District of Columbia (“District”) and the Office of Contracts on behalf of the Office of Finance and Treasury (OFT) requires the Contractor to provide post transition services from the District’s previous program manager; Calvert, to the District’s new program manager; Ascensus College Savings, for services in relation to the District’s 529 College Savings plan.</p>
Vendor Name	Boston Financial Data Services
Procuring Agency	Office of the Chief Financial Officer, Office of Contracts
Point of Contact	Yemarshet Kebede, Contract Specialist 202-727-6321

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

CONTRACT NUMBER: CFOPD-17-C-039

CONTRACTOR: Boston Financial Data Services

CAPTION: 529 DC College Savings Plan Post Conversion 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 and 1701

2. MINIMUM NEED

The Office of the Chief Financial Officer (“OCFO”) for the District of Columbia (“District”) and the Office of Contracts on behalf of the Office of Finance and Treasury (OFT) requires the Contractor to provide Post Conversion Services for the 529 DC College Savings plan from the previous program manager Calvert, to the new program manager Ascensus College Savings.

3. ESTIMATED REASONABLE PRICE

The contract amount is \$134,546.62. The contractor’s pricing was determined fair and reasonable based on market research.

4. FACTS WHICH JUSTIFY SOLE SOURCE PROCUREMENT

The Government of the District of Columbia (the “District”), Office of the Chief Financial Officer is charged with administering the District “College Savings Act of 2000” as stated in D.C. Law 13-212, approved March 31, 2001, and as amended, by the College Savings Program Temporary Act of 2002 D.C. Law 14-186, approved October 1, 2002, and the College Saving Program Act of 2002, D.C. Law 14-307 approved June 5, 2003.

The District has a critical need for uninterrupted availability of services, as the District is required by law under D.C Laws 13-212, 14-186, and 14-307 to provide 529 College Savings Plan Services on a consistent basis.

The Office of Finance and Treasury has an immediate need for Post Conversion Services from Boston Financial Data Services (BFDS). BFDS served as the subcontractor to the District's previous provider Calvert and provided record keeping services on behalf of the District. During the transition process Calvert had dissolved as a company and no longer provides the 529 College Plan services. In order for the District to receive the tax reporting information that is required by federal law, a contract must be established with BFDS since they already maintain this information on behalf of the District and this information cannot be obtained by any other contractor. BFDS is the only source that is readily available to perform this essential requirement without interruption of services.

Based on the above justification, it is in the best interest of the District of Columbia that a contract award be made to Calvert Investments.

5. **CERTIFICATION BY AGENCY HEAD**

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

Jeffrey A. Barnette
DC Treasurer and Deputy Chief Financial Officer
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 execution of a sole source contract under the cited authority. I recommend that the Director approve this sole source contract.

Anthony A. Stover, 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 in the best interest of the District of Columbia and its needs to award the contract to Boston Financial Data Services. Accordingly, I determine that the District is justified in using the sole source method of procurement.

Dorothy Whisler Fortune
Director, Office of Contracts

Date

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<input type="checkbox"/>	 CFOPD-10-C-040 - Unclaimed Property Management System - Wagers & Associates - Notice of Sole Source Extension and DF.pdf View Download	Title: Intent to Award Sole Source D&F – Unclaimed Property Management System - Document #: CFOPD-10-C-40 - Due Date: July 30, 2017 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431)	3623k	v. 2	Jul 20, 2017, 4:21 PM	Chrishelle Minor (OCFO)
<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 13, 2016 @ 3:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431)	3508k	v. 1	Oct 3, 2016, 3:21 PM	Chrishelle Minor (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 Financial Statements for the 529 College Savings Plan - Document #: CFOPD-11-C-015 - Due Date: October 22, 2016 @ 2:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431)	3638k	v. 1	Oct 12, 2016, 3:10 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 CFOPD-11-C-043 - Unclaimed Property Custody and Accounting servicesm - Xerox State and Local Solutions, Inc. - Modification 5 Sole Source DF.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – Unclaimed Property Custody and Accounting services - Document #: CFOPD-11-C-043 - Xerox State and Local Solutions, Inc. - Due Date: November 7, 2016 @ 5:00 pm EST - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431	3521k	v. 1	Oct 27, 2016, 4:57 PM	Anthony Stover (OCFO)

<input type="checkbox"/>	 CFOPD-11-C-043 - Unclaimed Property Custody and Accounting services - Xerox State and Local Solutions, Inc. - Modification 6 Sole Source DF.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – Unclaimed Property Custody and Accounting services - Document #: CFOPD-11-C-043 - Xerox State and Local Solutions, Inc. - Due Date: September 2, 2017 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431	3594k	v. 1	Aug 23, 2017, 4:21 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 CFOPD-12-C-012 - Audit Services for Parent Subsidiary Brother Sister Corporation Services - Notice of Sole Source DF.pdf View Download	Title: Intent to Award Sole Source Contract Extension – Determination and Findings for Audit of Parent - Subsidiary and Brother - Sister Corporations Document #: CFOPD-12-C-012 Due Date: August 3, 2017 POC: Crystal Farmer-Linder email: crystal.farmer-linder2@dc.gov Telephone: 202-442-6424	256k	v. 1	Jul 25, 2017, 3:17 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 CFOPD-12-C-015 - Lottery Draw Services - Scientific Games International Inc - Notice of Sole Source Extension and DF - Modification 9.pdf View Download	Title: Intent to Award Sole Source Contract Extension – Determination and Findings for Lottery Draw Services Document #: CFOPD-12-C-015 - Scientific Games International, Inc. - Due Date: September 3, 2017 POC: Peter Lloyd (email: peter.lloyd@dc.gov Telephone: 202-442-6431)	3740k	v. 1	Aug 24, 2017, 2:07 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 CFOPD-12-C-034 - Collection Services for United Medical Center - Nationwide Recovery Service, Inc. - Notice of Sole Source Extension and DF (2).pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – United Medical Center Collection Services (primary) - Document #: CFOPD-12-C-034 - Due Date: August 26, 2017 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431	3571k	v. 1	Aug 16, 2017, 3:07 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 CFOPD-12-C-034 - Collection Services for United Medical Center - Nationwide Recovery Service, Inc. - Notice of Sole Source Extension and DF.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – United Medical Center Collection Services (primary) - Document #: CFOPD-12-C-034 - Due Date: July 1, 2017 @ 5:00 pm EDT - POC: Peter Lloyd (email:	3614k	v. 1	Jun 21, 2017, 3:06 PM	Chrishelle Minor (OCFO)

peter.lloyd@dc.gov or
telephone: 202-442-6431

<input type="checkbox"/>	 CFOPD-17-C-039 - 529 Post Conversion Services - Boston Financial Data Services - Notice for Sole Source DF.pdf View Download	Title: Intent to Award Sole Source DF - 529 Post Conversion Services - Boston Financial Data Services Document #: CFOPD-17-C-039 Due Date: August 24, 2017 POC: Yemarshet Kebede email: yemarshet.kebede@dc.gov Telephone: 202-727-6321	321k	v. 1	Aug 14, 2017, 11:12 AM	Chrishelle Minor (OCFO)
<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: May 26, 2017 POC: Carla Roane email: Carla.Roane@dc.gov Telephone: 202-442-6452	3755k	v. 1	May 16, 2017, 4:37 PM	Drakus Wiggins
<input type="checkbox"/>	 PO-GF-2010-C-1089-DJ - UDC Collection Services Secondary - Williams & Fudge Inc - D&F for Sole Source extension.pdf View Download	Title: Intent to Award Sole Source Determinations and Findings – University of the District of Columbia Collection Services (secondary) - Document #: PO-GF-2010-C-1089-DJ Collection Services - Due Date: July 30, 2017 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone: 202-442-6431)	3464k	v. 3	Jul 20, 2017, 4:08 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 PO-GF-2010-C-1090-DJ - UDC Universal Collection Services Primary - ConServe - Notice of Sole Source DF for Modification 13.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 11, 2016 @ 5:00 pm EDT - POC: Peter Lloyd (email: peter.lloyd@dc.gov or telephone (202-442-6431)	3401k	v. 1	Jun 1, 2017, 4:10 PM	Chrishelle Minor (OCFO)
<input type="checkbox"/>	 PO-GF-2010-C-1090-DJ - UDC Universal Collection Services Primary - ConServe - Notice of Sole Source DF for Modification 14.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: July 30, 2017 @ 5:00 pm EDT - POC: Peter Lloyd (email:	3454k	v. 1	Jul 20, 2017, 4:09 PM	Chrishelle Minor (OCFO)

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

<input type="checkbox"/>	W RQ963672 - Professional Services – Projection Presentation Technology - Intent to Award Sole Souce.docx View Download	Title Intent to Award Sole Source Procurement-Determination and Findings for IT and AV Services- Document # RQ963672 - Due Date August 17, 2017 – POC Sharon Guilford (email – Sharon.guilford@dc.gov or telephone 202-442-8070)	20k	v. 1	Aug 15, 2017, 11:57 AM	Chrishelle Minor (OCFO)
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