

Intent to Award Sole Source Contracts

Title	Intent to Award Sole Source Contract Extension-Determination and Findings
Notice Date	July 20, 2017
Response Due Date	July 30, 2017
Contract Number	CFOPD-10-C-040
Contract Description	<p>Unclaimed Property Management System</p> <p>Description: The Government of the District of Columbia (District) Office Finance and Treasury (OFT) Unclaimed Property Department has an immediate need for a high quality Contractor possessing sound knowledge and experience in scanning and indexing services for holder and claims for Unclaimed Property.</p>
Vendor Name	Wagers and Associates, Inc.
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-10-C-040
CONTRACTOR: Wagers and Associates, Inc.
CAPTION: Unclaimed Property Management System
PROGRAM AGENCY: Office of Finance and Treasury, Unclaimed Property Department
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 Finance and Treasury (OFT) has an immediate need for a Contractor to provide an unclaimed property system to manage all aspects of unclaimed property including information regarding holders, property, claims and owners of unclaimed property with ongoing timely and dependable technical support.

3. ESTIMATED REASONABLE PRICE

There is a \$26,300 cost associated with this extension from October 1, 2017 through September 30, 2018. Price has been determined to be reasonable based on previous competitive pricing submitted at the time of the initial award. The same contract pricing remains during this extension period.

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

Wagers and Associates, Inc. was awarded Contract No. CFOPD-10-C-040 to provide an unclaimed property system to manage all aspects of unclaimed property including information regarding holders, property, claims and owners of unclaimed property with ongoing timely and dependable technical support. The contract term ends September 30, 2017.

In preparation for a replacement contract, the Office of Finance and Treasury (OFT) developed requirements based on the latest trends in the unclaimed property management system industry. The improved requirements have been solicited through a competitive process with an anticipated contract effective date on or before October 1, 2018. OFT has a critical need for uninterrupted services due to legislation regarding the District's handling of unclaimed property. Due to Wager's and Associates, Inc.'s capacity for these services, a market survey was not conducted.

Therefore, it is necessary to extend the contract through September 30, 2018, to allow for continuity of service and to allow time for the award of a new contract with modern requirements.

5. **CERTIFICATION BY AGENCY HEAD**

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

Jeffrey Barnette Date
DC Treasurer and Deputy Chief Financial Officer
Office of Finance and Treasury

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 Date
Contracting Officer
Office of Contracts

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 B. Fortune, Esq., CPPO
Director
Office of Contracts





Date






DRAFT

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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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