Intent to Award Sole Source Contracts

Title	Intent to Award Sole Source Contract Extension-Determination and Findings					
Notice Date	August 18, 2021					
Response Due Date	August 28, 2021					
Contract Number	CFOPD-12-C-016					
Contract Description	University of the District of Columbia Trust Fund Investment Management services Description: The Office of Chief Financial Officer ("OCFO"), on behalf of the Office of Finance and Treasury ("OFT"), has a requirement for full fiduciary investment consulting services for the University of the District of Columbia Endowment.					
Vendor Name	Stifel, Nicolaus & Company, Inc.					
Procuring Agency	Office of the Chief Financial Officer, Office of Contracts					
Point of Contact	Peter Lloyd, Contract Specialist <u>peter.lloyd@dc.gov</u> 202-442-6431					

Determination and Findings for a Sole Source Extension of Contract Contract Number: CFOPD-12-C-016 Page 1 of 3

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-12-C-016
CONTRACTOR:	Stifel, Nicolaus & Company, Inc.
CAPTION:	UDC Trust Fund Investment Management services
PROGRAM AGENCY:	Office of the Chief Financial Officer
CONTRACTING AGENCY:	Office of Contracts

1. <u>AUTHORIZATION</u>

D.C. Official Code §2-354.04; 27 DCMR 1304, 1700 and 1701 and 2005.2(b)

2. <u>MINIMUM NEED</u>

The District of Columbia, Office of the Chief Financial Officer (OCFO), has an on-going requirement for a Contractor to provide investment advisory services for the University of the District of Columbia's Endowment Fund.

3. ESTIMATED REASONABLE PRICE

The estimated fair and reasonable contract amount for this extension period from September 16, 2021 through September 15, 2022 is not-to-exceed \$200,000.00, based on the Contractor's rate and District estimated usage. 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). Determination and Findings for a Sole Source Extension of Contract Contract Number: CFOPD-12-C-016 Page 2 of 3

4. FACTS WHICH JUSTIFY SOLE SOURCE EXTENSION OF CONTRACT

Stifel, Nicolaus & Company, Inc. is the incumbent contractor and has satisfactorily provided the required services for over eight (8) years under Contract CFOPD-12-C-016. The contract was awarded on August 29, 2012 with a five (5) year base period and four (4) one (1) year option periods.

It is imperative that this contract is extended to ensure that the investment manager remains in place to manage the assets in the portfolio. As the portfolio includes assets covering a diversified mix of assets that require professional management oversight at all times to ensure that the portfolio meets Endowment objectives and is a position for any adverse financial market event.

The incumbent contractor, Stifel, Nicolaus & Company, Inc., is the only contractor with the capacity to provide continuous and uninterrupted services for the Trust Fund Endowment at this time. Sufficient time must be allowed for processing a new procurement for these services as well as time for a smooth transition to a new vendor with advanced service capabilities. To facilitate this new acquisition and maintain uninterrupted UDC Trust Fund Investment Management services, the contract will be extended through August 28, 2022.

The OCFO has a critical need to maintain uninterrupted endowment investment management and these services, furnished and administered by Stifel, Nicolaus & Company, Inc. are an integral part of the OCFO customer service commitment 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-12-C-016 through August 28, 2022 to allow for continuity of services, execution of a new contract award and potential transition to a new contractor.

5. <u>CERTIFICATION BY AGENCY HEAD</u>

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

Carmen Pigler Deputy Chief Financial Officer and Treasurer Date

Determination and Findings for a Sole Source Extension of Contract Contract Number: CFOPD-12-C-016 Page 3 of 3

6. <u>CERTIFICATION BY CONTRACTING OFFICER</u>

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.

Drakus Wiggins, CPPB, 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 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 § 2005.2(b).

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

Date

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C	Comments								

You do not have permission to add comments.