

<b>SOLICITATION, OFFER, AND AWARD</b>			1. Caption			Page of Pages				
			<b>Indemnity Insurance Plans</b>			1                      66				
2. Contract Number		3. Solicitation Number		4. Type of Solicitation		5. Date Issued		6. Type of Market		
		<b>DCBE-2009-R-0400</b>		<input type="checkbox"/> Sealed Bid (IFB) <input checked="" type="checkbox"/> Sealed Proposals (RFP) <input type="checkbox"/> Sole Source <input type="checkbox"/> Emergency		<b>12/15/08</b>		<input checked="" type="checkbox"/> Open <input type="checkbox"/> Set Aside <input type="checkbox"/> Open Market with Set-Aside SBE Designated Category:		
7. Issued By:				8. Address Offer to:						
<b>Office of Contracting and Procurement</b>				<b>Office of Contracting and Procurement</b>						
<b>Group VI</b>				<b>Bid Room</b>						
<b>441 4th Street, NW, Suite 700 South</b>				<b>441 4th Street, NW, Suite 703 South</b>						
<b>Washington, DC 20001</b>				<b>Washington, DC 20001</b>						
NOTE: In sealed bid solicitations "offer" and offeror" means "bid" and "bidder"										
<b>SOLICITATION</b>										
9. Sealed offers in original and <u>10</u> copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if hand carried to the bid counter located at <u>441 4th Street, NW, Suite 703S, Bid Room, Washington, DC</u> until <u>2:00 p.m.</u> local time <u>December 29, 2008</u> (Hour) (Date)										
CAUTION: Late Submissions, Modifications and Withdrawals: See 27 DCMR chapters 15 & 16 as applicable. All offers are subject to all terms & conditions contained in this solicitation.										
10. For Information Contact	A. Name			B. Telephone			C. E-mail Address			
	<b>John Holmes II</b>			(Area Code)	(Number)	(Ext)	<a href="mailto:john.holmes@dc.gov">john.holmes@dc.gov</a>			
				<b>202</b>	<b>724-5281</b>					
11. Table of Contents										
(X)	Section	Description	Page No.	(X)	Section	Description	Page No.			
PART I - THE SCHEDULE				PART II CONTRACT CLAUSES						
X	A	Solicitation/Contract Form	1	X	I	Contract Clauses	I1 - I7			
X	B	Supplies or Services and Price/Cost	B1 - B4	PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS						
X	C	Specifications/Work Statement	C1 - C261	X	J	List of Attachments	J1 - J2			
x	D	Packaging and Marking	D1	PART IV - REPRESENTATIONS AND INSTRUCTIONS						
X	E	Inspection and Acceptance	E1 - E7			Representations, certifications and other statements of offerors	K1 - K3			
X	F	Deliveries or Performance	F1 - F34	X	K					
X	G	Contract Administration Data	G1 - G15	X	L	Instructions, conditions & notices to offerors	L1 - L44			
X	H	Special Contract Requirements	H1 - H34	X	M	Evaluation factors for award	M1 - M11			
<b>OFFER</b>										
12. In compliance with the above, the undersigned agrees, if this offer is accepted within <u>120</u> calendar days from the date for receipt of offers specified above, to furnish any or all items upon which prices are offered at the price set opposite each item, delivered at the designated point(s), within the time specified herein.										
13. Discount for Prompt Payment		10 Calendar days %		20 Calendar days %		30 Calendar days %		___ Calendar days %		
14. Acknowledgement of Amendments (The offeror acknowledges receipt of amendments to the SOLICITATION):			Amendment Number		Date		Amendment Number		Date	
15A. Name and Address of Offeror					16. Name and Title of Person Authorized to Sign Offer/Contract					
15B. Telephone			15 C. Check if remittance address is different from above - Refer to Section G		17. Signature			18. Offer Date		
(Area Code)	(Number)	(Ext)								

**AWARD (TO BE COMPLETED BY GOVERNMENT)**

## **SECTION B: SUPPLIES OR SERVICES AND PRICE**

### **B.1 SUMMARY OF SERVICES OR SUPPLIES**

- B.1.1** The Government of the District of Columbia's (herein referred to as "the District") Office of Contracting and Procurement, on behalf of the District of Columbia's Department of Human Resources, is seeking a licensed insurance carrier to administer an array of Indemnity Plans for up to 27,000 District employees. The District requires five (5) plans: Personal Sickness Indemnity, Personal Accident Indemnity, Cancer Indemnity, Critical Illness Protection, and Hospital Confinement Indemnity.
- B.1.2** The District contemplates award of a requirements contract - based on fixed monthly costs per plan. District employees who elect to participate in the program will pay premiums using pretax payroll deductions.
- B.1.3** The District will purchase its requirements of the articles or services included herein from the Contractor. The estimated quantities stated herein reflect the best estimates available. The estimate shall not be construed as a representation that the estimated quantity will be required or ordered, or that conditions affecting requirements will be stable. They shall not be construed to limit the quantities which may be ordered from the Contractor by the District or to relieve the Contractor of its obligation to fill all such orders.
- B.1.4** The District will purchase its requirements of the articles or services included herein from the Contractor. The estimated quantities stated herein reflect the best estimates available. The estimate shall not be construed as a representation that the estimated quantity will be required or ordered, or that conditions affecting requirements will be stable. They shall not be construed to limit the quantities which may be ordered from the Contractor by the District or to relieve the Contractor of its obligation to fill all such orders.
- a) Delivery or performance shall be made only as authorized in accordance with the Ordering Clause, Section G.4. The District may issue orders requiring delivery to multiple destinations or performance at multiple locations. If the District urgently requires delivery before the earliest date that delivery may be specified under this contract, and if the Contractor shall not accept an order providing for the accelerated delivery, the District may acquire the urgently required goods or services from another source.
  - b) There is no limit on the number of orders that may be issued. The District may issue orders requiring delivery to multiple destinations or performance at multiple locations.
  - c) Any order issued during the effective period of this contract and not completed within that period shall be completed by the Contractor within the time specified in the order. The contract shall govern the Contractor's and District's rights and obligations with respect to that order to the same extent as if the order were completed during the contract's effective period; provided, that the Contractor

shall not be required to make any deliveries under this contract after the contracts period of performance.

**B.2 PRICE SCHEDULE**

**B.2.1 Base Year**

**Table 1. BASE YEAR PRICE SCHEDULE**

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
0001AA	Providing a Personal Sickness Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
0001AB	Providing a Personal Sickness Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
0001AC	Providing a Personal Sickness Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
0001AD	Providing a Personal Sickness Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
0002AA	Providing a Personal Accident Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
0002AB	Providing a Personal Accident Indemnity Plan for employees ages 36 to 45 as	\$_____ Bi-weekly rate per participant	135	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	described in Section C.3.			
0002AC	Providing a Personal Accident Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
0002AD	Providing a Personal Accident Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
0003AA	Providing a Cancer Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
0003AB	Providing a Cancer Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
0003AC	Providing a Cancer Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
0003AD	Providing a Cancer Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
0004AA	Providing a Critical Illness Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
0004AB	Providing a Critical Illness Plan for employees ages 36 to	\$_____ Bi-weekly rate per	67	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	45 as described in Section C.3.	participant		
0004AC	Providing a Critical Illness Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
0004AD	Providing a Critical Illness Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
0005AA	Providing a Hospital Confinement Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
0005AB	Providing a Hospital Confinement Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
0005AC	Providing Hospital Confinement Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
0005AD	Providing a Hospital Confinement Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____

**B.2.2 First Option Year**

**Table 2. FIRST OPTION YEAR PRICE SCHEDULE**

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
1001AA	Providing a Personal Sickness Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
1001AB	Providing a Personal Sickness Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
1001AC	Providing a Personal Sickness Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
1001AD	Providing a Personal Sickness Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
1002AA	Providing a Personal Accident Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
1002AB	Providing a Personal Accident Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
1002AC	Providing a Personal	\$_____	135	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	Accident Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	Bi-weekly rate per participant		
1002AD	Providing a Personal Accident Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
1003AA	Providing a Cancer Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
1003AB	Providing a Cancer Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
1003AC	Providing a Cancer Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
1003AD	Providing a Cancer Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
1004AA	Providing a Critical Illness Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
1004AB	Providing a Critical Illness Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
1004AC	Providing a Critical Illness Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
1004AD	Providing a Critical Illness Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
1005AA	Providing a Hospital Confinement Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
1005AB	Providing a Hospital Confinement Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
1005AC	Providing Hospital Confinement Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
1005AD	Providing a Hospital Confinement Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____

**B.2.3 Second Option Year**

**Table 3. SECOND OPTION YEAR PRICE SCHEDULE**

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
2001AA	Providing a Personal Sickness Indemnity	\$_____ Bi-weekly	33	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	Plan for employees ages 18 to 35 as described in Section C.3.	rate per participant		
2001AB	Providing a Personal Sickness Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
2001AC	Providing a Personal Sickness Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
2001AD	Providing a Personal Sickness Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
2002AA	Providing a Personal Accident Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
2002AB	Providing a Personal Accident Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
2002AC	Providing a Personal Accident Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
2002AD	Providing a Personal Accident Indemnity	\$_____ Bi-weekly	135	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	Plan for employees ages 56 to 70 as described in Section C.3.	rate per participant		
2003AA	Providing a Cancer Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
2003AB	Providing a Cancer Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
2003AC	Providing a Cancer Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
2003AD	Providing a Cancer Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
2004AA	Providing a Critical Illness Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
2004AB	Providing a Critical Illness Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
2004AC	Providing a Critical Illness Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
2004AD	Providing a Critical Illness Plan for employees ages 56 to	\$_____ Bi-weekly rate per	67	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	70 as described in Section C.3.	participant		
2005AA	Providing a Hospital Confinement Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
2005AB	Providing a Hospital Confinement Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
2005AC	Providing Hospital Confinement Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
2005AD	Providing a Hospital Confinement Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____

**B.2.4** Third Option Year

**Table 4. THIRD OPTION YEAR PRICE SCHEDULE**

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
3001AA	Providing a Personal Sickness Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
3001AB	Providing a Personal Sickness Indemnity Plan for employees ages 36 to 45 as	\$_____ Bi-weekly rate per participant	33	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	described in Section C.3.			
3001AC	Providing a Personal Sickness Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
3001AD	Providing a Personal Sickness Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
3002AA	Providing a Personal Accident Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
3002AB	Providing a Personal Accident Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
3002AC	Providing a Personal Accident Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
3002AD	Providing a Personal Accident Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
3003AA	Providing a Cancer Indemnity Plan for employees ages 18 to 35 as described in	\$_____ Bi-weekly rate per participant	50	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	Section C.3.			
3003AB	Providing a Cancer Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
3003AC	Providing a Cancer Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
3003AD	Providing a Cancer Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
3004AA	Providing a Critical Illness Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
3004AB	Providing a Critical Illness Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
3004AC	Providing a Critical Illness Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
3004AD	Providing a Critical Illness Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
3005AA	Providing a Hospital Confinement Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
3005AB	Providing a Hospital Confinement Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
3005AC	Providing Hospital Confinement Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
3005AD	Providing a Hospital Confinement Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____

**B.2.5** Fourth Option Year

**Table 5. Fourth Option Year Price Schedule**

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
4001AA	Providing a Personal Sickness Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
4001AB	Providing a Personal Sickness Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
4001AC	Providing a Personal Sickness Indemnity Plan for employees ages 46 to 55 as described in Section	\$_____ Bi-weekly rate per participant	33	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	C.3.			
4001AD	Providing a Personal Sickness Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	33	\$_____
4002AA	Providing a Personal Accident Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
4002AB	Providing a Personal Accident Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
4002AC	Providing a Personal Accident Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
4002AD	Providing a Personal Accident Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	135	\$_____
4003AA	Providing a Cancer Indemnity Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
4003AB	Providing a Cancer Indemnity Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
4003AC	Providing a Cancer Indemnity Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
4003AD	Providing a Cancer Indemnity Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
4004AA	Providing a Critical Illness Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
4004AB	Providing a Critical Illness Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
4004AC	Providing a Critical Illness Plan for employees ages 46 to 55 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
4004AD	Providing a Critical Illness Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	67	\$_____
4005AA	Providing a Hospital Confinement Plan for employees ages 18 to 35 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
4005AB	Providing a Hospital Confinement Plan for employees ages 36 to 45 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____
4005AC	Providing Hospital Confinement Plan for	\$_____ Bi-weekly	50	\$_____

<b>Contract Line Item No. (CLIN)</b>	<b>Item Description</b>	<b>Price Per Unit</b>	<b>Estimated Quantity</b>	<b>Total Estimated Price</b>
	employees ages 46 to 55 as described in Section C.3.	rate per participant		
4005AD	Providing a Hospital Confinement Plan for employees ages 56 to 70 as described in Section C.3.	\$_____ Bi-weekly rate per participant	50	\$_____

## **SECTION C: SPECIFICATIONS/WORK STATEMENT**

### **C.1 SCOPE**

**C.1.1** The Government of the District of Columbia's (herein referred to as "the District") Office of Contracting and Procurement, on behalf of the District of Columbia's Department of Human Resources, is seeking a licensed insurance carrier to administer an array of Indemnity Plans for up to 27,000 District employees. The District requires five (5) plans: Personal Sickness Indemnity, Personal Accident Indemnity, Cancer Indemnity, Critical Illness Protection, and Hospital Confinement Indemnity.

**C.1.2** The District contemplates award of a requirements contract - based on fixed monthly costs per plan. District employees who elect to participate in the program will pay premiums using pretax payroll deductions.

**C.1.3** The District will purchase its requirements of the articles or services included herein from the Contractor. The estimated quantities stated herein reflect the best estimates available. The estimate shall not be construed as a representation that the estimated quantity will be required or ordered, or that conditions affecting requirements will be stable. They shall not be construed to limit the quantities which may be ordered from the Contractor by the District or to relieve the Contractor of its obligation to fill all such orders.

### **C.1.4 Applicable Documents**

NOT APPLICABLE

### **C.1.5 Definitions**

- C.1.5.1** Eligible Employee - A District employee who is in an active pay status (i.e. receives a pay check for work during a current pay period) and is a member of Permanent Bargaining and Non-Bargaining Executive Level, a full-time employee or a part-time permanent employee (at least 20 hours per week).
- C.1.5.2** Licensed Insurance Carrier – An insurance company licensed by the District’s Department of Insurance, Securities, and Banking Agency to provide the solicited insurance to District employees.

### **C.2 BACKGROUND**

**C.2.1** With talent scarce within the DC Metropolitan area, due to an abundance of small and large businesses, the District struggles to retain and recruit quality, qualified personnel. To combat this fact and increase its competitiveness, the District seeks to expand the breadth of its health insurance benefits. District employees already enjoy the security of short-term and long-term disability insurance, along with basic healthcare coverage, and The District is not interested in replacing any current benefit offerings.

**C.2.2** Indemnity plans, such as those solicited here, would be novel, welcome perquisites, helping to strengthen the appeal of District employment. Plan participation would be voluntary and completely funded by District employees.

### **C.3 REQUIREMENTS**

#### **C.3.1 Personal Sickness Indemnity Plan**

**C.3.2** The Contractor shall provide a Personal Sickness Indemnity Plan that pays eligible employees cash benefits, independent of other insurance coverage, for experiencing an event below.

**C.3.2.1** The Contractor shall pay a covered employee a cash benefit of fifty dollars (\$50) per day when the covered employee is hospitalized for more than 24 hours for a sickness.

**C.3.2.2** The Contractor shall pay a covered employee a cash benefit of one hundred fifty dollars (\$150) when the covered employee undergoes a CT scan, a magnetic resonance imaging (MRI), an electroencephalogram (EEG), a stress test, a myelogram, or an arteriogram.

**C.3.2.3** The Contractor shall pay a covered employee a cash benefit of one hundred dollars (\$100) when the covered employee has surgery performed in a hospital or surgical center.

**C.3.2.4** The Contractor shall pay a covered employee a cash benefit of fifty dollars (\$50) per day when the covered employee is confined to a hospital’s rehabilitation unit.

**C.3.2.5** The Contractor shall pay a covered employee a cash benefit of one hundred dollars (\$100) when the covered employee is transported by ground or air to a hospital or surgical center.

**C.3.3 Personal Accident Indemnity Plan**

**C.3.4** The Contractor shall provide a Personal Accident Indemnity Plan that pays enrolled employees cash benefits, independent of other insurance coverage, for experiencing an event below.

**C.3.4.1** The Contractor shall pay a covered employee a cash benefit of thirty-five dollars (\$35) when the covered employee incurs a brain concussion, a fracture, a skin graft, a coma, paralysis, or an eye injury.

**C.3.4.2** The Contractor shall pay a covered employee a cash benefit of forty thousand dollars (\$40,000) when the covered employee has his or her arms, eyes, feet, legs, or hands dismembered.

**C.3.4.3** The Contractor shall pay a covered employee a cash benefit of ten thousand dollars (\$10,000) when the covered employee has his or her arm, eye, foot, leg, or hand dismembered.

**C.3.4.4** The Contractor shall pay a covered employee a cash benefit of four hundred dollars (\$400) when the covered employee incurs an injury resulting in treatment at a hospital's intensive care unit.

**C.3.4.5** The Contractor shall pay a covered employee a cash benefit of one hundred dollars (\$100) when the covered employee is transported by ground or air to a hospital or surgical center.

**C.3.4.6** The Contractor shall pay a covered employee a cash benefit of fifty dollars (\$50) per day when the covered employee is hospitalized for more than 24 hours due to an accident.

**C.3.5 Cancer Indemnity Plan**

**C.3.6** The Contractor shall provide a Cancer Indemnity Plan that pays covered employees a cash benefit, independent of other insurance coverage, for experiencing an event below.

**C.3.6.1** The Contractor shall pay a covered employee a cash benefit of four hundred dollars (\$400) when the covered employee undergoes injected/oral chemotherapy or radiation therapy.

**C.3.6.2** The Contractor shall pay a covered employee a cash benefit of one hundred dollars (\$100) when the covered employee undergoes skin cancer surgery or surgical anesthesia.

**C.3.6.3** The Contractor shall pay a covered employee a cash benefit of five hundred dollars (\$500) when the covered employee undergoes a bone marrow transplant, a stem cell transplant, or immunotherapy.

**C.3.6.4** The Contractor shall pay a covered employee a cash benefit of four hundred dollars (\$400) when the covered employee undergoes injected/oral chemotherapy or radiation therapy.

**C.3.6.5** The Contractor shall pay a covered employee a cash benefit of one hundred dollars (\$100) when the covered employee is transported by ground or air to a hospital or surgical center.

### **C.3.7 Critical Illness Protection Plan**

**C.3.8** The Contractor shall provide a Critical Illness Protection Plan that pays covered employees a cash benefit, independent of other insurance coverage, for experiencing an event below.

**C.3.8.1** The Contractor shall pay a covered employee a cash benefit of five thousand dollars (\$5,000) when the covered employee experiences a heart attack, coma, paralysis, stroke, third-degree burn, or an organ transplant.

**C.3.8.2** The Contractor shall pay a covered employee a cash benefit of one hundred dollars (\$100) when the covered employee is transported by ground or air to a hospital or surgical center.

**C.3.8.3** The Contractor shall pay a covered employee a cash benefit of fifty dollars (\$50) per day when the covered employee is hospitalized for more than 24 hours due to a critical illness.

### **C.3.9 Hospital Confinement Indemnity Plan**

**C.3.10** The Contractor shall provide a Hospital Confinement Indemnity Plan that pays covered employees a cash benefit, independent of other insurance coverage, for experiencing an event below.

**C.3.10.1** The Contractor shall pay a covered employee a cash benefit of four hundred dollars (\$400) per day when the covered employee is hospitalized for more than 24 hours due to sickness.

**C.3.10.2** The Contractor shall pay a covered employee a cash benefit of five hundred dollars (\$500) per day when the covered employee is hospitalized for more than 24 hours due to injury.

### **C.3.11 Transition**

**C.3.11.1** The Contractor shall submit an implementation plan containing a detailed timetable of the obligatory activities and tasks to establish the five indemnity plans, including, but not limited to, dates for deliverables and proposed dates of enrollment sessions.

**C.3.11.2** The Contractor shall supply the District with an administrative manual containing a summary of the plans, claim forms, contact information of key personnel, relevant policies, customer service forms, and program brochures.

**C.3.11.3** The Contractor shall send, prior to distributing to employees, enrollment and program materials to the Contracting Officer's Technical Representative (COTR) for review and approval.

### **C.3.12 Website**

**C.3.12.1** The Contractor shall enable the District to view and download reports from a web-based system, on-demand, that summarize program activity, transactions, and accounting history.

**C.3.12.2** The Contractor shall allow participants to download claim from its website.

### **C.3.13 Ongoing Operations and Communications**

**C.3.13.1** The Contractor shall accept data files extracted from the District's Human Resource Management System (HRMS) – PeopleSoft – to determine employee eligibility. The District will not modify its HRMS to accommodate incompatibilities with the Contractor's systems.

**C.3.13.2** The Contractor shall provide the District with the names, phone numbers, and email addresses of the personnel assigned to manage and support the indemnity plans.

**C.3.13.3** The Contractor shall provide on-site representatives to conduct six (6) enrollment sessions.

**C.3.13.4** The Contractor shall make weekly updates to its employee eligibility records.

**C.3.13.5** The Contractor shall meet with the COTR quarterly, if requested.

### **C.3.14 Customer Service**

**C.3.14.1** The Contractor shall provide toll-free customer service support, weekdays from 8:00 a.m. to 5:30 p.m. EST.

**C.3.14.2** The Contractor shall define, subject to the District's approval, a formal procedure for resolving program participants' inquiries.

### **C.3.15 Performance Guarantees**

**C.3.15.1** The Contractor shall submit a summary of its performance statistics, quarterly, indicating whether performance measures were met the proceeding quarter.

**C.3.15.2** The Contractor shall adhere to the following performance guarantees:

**Table 7. PERFORMANCE GUARANTEES**

Description	Guarantee
Overall customer satisfaction	Overall program participant satisfaction shall be greater than ninety percent (90%), as determined by a District sponsored survey.
Customer service call response times and call abandon rate	Eighty percent (80%) of calls shall be answered within thirty (30) seconds.  Call abandonment rate shall not exceed 5%.

**C.3.16 Information Security**

**C.3.16.1** The Contractor shall provide the District with an overview of its information security policies and procedures that attest support and compliance with the following:

- (a) The Contractor shall safeguard sensitive employee and payroll data by taking pains to ensure data are not accessed or breached by individuals or groups unauthorized by the District.
- (b) The Contractor shall safeguard information exchanged electronically through the Internet or other electronic exchange mechanisms by using industry-accepted best practices for authentication and data encryption.
- (c) The Contractor shall withhold employee and payroll information from third party organizations that are not directly related to providing the services under this contract, in accordance with Section I.3.

**C.3.17 Payments and Deductions**

**C.3.17.1** The Contractor shall accept electronic fund transfers (EFT) or check as a payment method.

**C.3.17.2** The Contractor shall be responsible for payment of per transaction banking charges resulting from eligibility and premium remittance from the Districts payroll system.

**SECTION D: PACKAGING AND MARKING**

NOT APPLICABLE

## **SECTION E: INSPECTION AND ACCEPTANCE**

### **E.1 INSPECTION AND ACCEPTANCE**

**E.1.1** The inspection and acceptance requirements for the resultant contract shall be governed by clause number six (6), Inspection of Services, of the Government of the District of Columbia's Standard Contract Provisions for use with Supplies and Services Contracts, dated March 2007.

**SECTION F: DELIVERIES OR PERFORMANCE**

**F.1 TERM OF CONTRACT**

**F.1.1** The term of the contract shall be for a period of one (1) year from the date of award specified on the cover page of the contract.

**F.2 OPTION TO EXTEND THE TERM OF THE CONTRACT**

**F.2.1** The District may extend the term of this contract for a period of four (4) one-year option periods, or successive fractions thereof, by written notice to the Contractor before the expiration of the contract; provided that the District will give the Contractor a preliminary written notice of its intent to extend at least thirty (30) days before the contract expires. The preliminary notice does not commit the District to an extension. The exercise of this option is subject to the availability of funds at the time of the exercise of this option. The Contractor may waive the thirty (30) day preliminary notice requirement by providing a written waiver to the Contracting Officer prior to expiration of the contract.

**F.2.2** If the District exercises this option, the extended contract shall be considered to include this option provision.

**F.2.3** The price for the option period shall be as specified in the contract.

**F.2.4** The total duration of this contract, including the exercise of any options under this clause, shall not exceed five (5) years.

**F.3 DELIVERABLES**

**F.3.1** The Contractor shall provide the deliverables described in Table 8.

**Table 8. DELIVERABLES**

<b>Section</b>	<b>Deliverable</b>	<b>Quantity</b>	<b>Format/Method of Delivery</b>	<b>Due Date</b>	<b>To Whom</b>
C.3.11.1	Implementation Plan	1	Hardcopy/Mail, Softcopy/Email	Upon Award	COTR
C.3.11.2	Administrative Manual	1	Hardcopy/Mail or Softcopy/Email	30 Days After Award	COTR
C.3.11.3	Enrollment and Program Material	1	Hardcopy/Mail, Softcopy/Email	15 Days After Award	COTR
C.3.12.1	On-demand Web Reports	1	Softcopy/Download	30 Days After Award / On-demand	COTR and others assigned

Section	Deliverable	Quantity	Format/Method of Delivery	Due Date	To Whom
				thereafter	
C.3.13.2	Management Team Contact Information	1	Softcopy/Email	Upon Award	COTR
C.3.14.1	Customer Service toll-free number	1	Hardcopy/Mail or Softcopy/Email	Upon Award	COTR
C.3.14.2	Defined Inquiry Resolution Procedure	1	Hardcopy/Mail or Softcopy/Email	Upon Award	COTR
C.3.15.1	Quarterly Inquiry Report	1	Hardcopy/Mail or Softcopy/Email	Quarterly	COTR
C.3.16.1	Information Security Policy and Procedures	1	Hardcopy/Mail or Softcopy/Email	Upon Award	COTR

**F.3.2** The Contractor shall submit to the District, as a deliverable, the report described in section H.5.5 of this contract that is required by the 51% District Residents New Hires Requirements and First Source Employment Agreement. If the Contractor does not submit the report as part of the deliverables, final payment to the Contractor may not be paid.

## **SECTION G: CONTRACT ADMINISTRATION DATA**

### **G.1 INVOICE PAYMENT**

**G.1.1** The District will make monthly payments to the Contractor, upon the submission of proper invoices, at the prices stipulated in this contract, for supplies delivered and accepted or services performed and accepted, less any discounts, allowances or adjustments provided for in this contract.

**G.1.2** The District will pay the Contractor on or before the 30th day after receiving a proper invoice from the Contractor.

### **G.2 INVOICE SUBMITTAL**

**G.2.1** The Contractor shall submit proper invoices on a monthly basis or as otherwise specified in Section G.4. Invoices shall be prepared in duplicate and submitted to the agency Chief Financial Officer (CFO) with concurrent copies to the Contracting Officer's Technical Representative (COTR) specified in Section G.9 below. The address of the CFO is:

**Name:** Office of Finance and Resource Management  
Attn: Accounts Payable  
**Address:** 441 4<sup>th</sup> Street, Suite 890N  
Washington, DC 20001  
**Telephone:** 202-727-0333

**G.2.2** To constitute a proper invoice, the Contractor shall submit the following information on the invoice:

**G.2.2.1** Contractor's name, federal tax ID and invoice date (Contractors shall date invoices as of the date of mailing or transmittal);

**G.2.2.2** Contract number and invoice number;

**G.2.2.3** Description, price, quantity and the date(s) that the supplies or services were delivered or performed;

**G.2.2.4** Other supporting documentation or information, as required by the Contracting Officer;

**G.2.2.5** Name, title, telephone number and complete mailing address of the responsible official to whom payment is to be sent;

**G.2.2.6** Name, title, phone number of person preparing the invoice;

**G.2.2.7** Name, title, phone number and mailing address of person (if different from the person identified in G.2.2.6 above) to be notified in the event of a defective invoice; and

**G.2.2.8** Authorized signature.

### **G.3 FIRST SOURCE AGREEMENT REQUEST FOR FINAL PAYMENT**

**G.3.1** For contracts subject to the 51% District Residents New Hires Requirements and First Source Employment Agreement requirements, final request for payment must be accompanied by the report or a waiver of compliance discussed in section H.5.5.

**G.3.2** No final payment shall be made to the Contractor until the CFO has received the Contracting Officer's final determination or approval of waiver of the Contractor's compliance with 51% District Residents New Hires Requirements and First Source Employment Agreement requirements.

#### **G.4 ORDERING CLAUSE**

- G.4.1** Any supplies and services to be furnished under this contract must be ordered by issuance of delivery orders or task orders by the Contracting Officer. Such orders may be issued during the term of this contract.
- G.4.2** All delivery orders or task orders are subject to the terms and conditions of this contract. In the event of a conflict between a delivery order or task order and this contract, the contract shall control.
- G.4.3** If mailed, a delivery order or task order is considered "issued" when the District deposits the order in the mail. Orders may be issued by facsimile or by electronic commerce methods.

#### **G.5 ASSIGNMENT OF CONTRACT PAYMENTS**

- G.5.1** In accordance with 27 DCMR 3250, the Contractor may assign funds due or to become due as a result of the performance of this contract to a bank, trust company, or other financing institution.
- G.5.2** Any assignment shall cover all unpaid amounts payable under this contract, and shall not be made to more than one party.
- G.5.3** Notwithstanding an assignment of contract payments, the Contractor, not the assignee, is required to prepare invoices. Where such an assignment has been made, the original copy of the invoice must refer to the assignment and must show that payment of the invoice is to be made directly to the assignee as follows:

Pursuant to the instrument of assignment dated \_\_\_\_\_,  
make payment of this invoice to \_\_\_\_\_  
(name and address of assignee).

#### **G.6 THE QUICK PAYMENT CLAUSE**

##### **G.6.1 Interest Penalties to Contractors**

- G.6.1.1** The District will pay interest penalties on amounts due to the Contractor under the Quick Payment Act, D.C. Official Code §2-221.01 et seq., for the period beginning on the day after the required payment date and ending on the date on which payment of the amount is made. Interest shall be calculated at the rate of 1% per month. No interest penalty shall be paid if payment for the completed delivery of the item of property or service is made on or before:
- a) the 3rd day after the required payment date for meat or a meat product;
  - b) the 5th day after the required payment date for an agricultural commodity; or
  - c) the 15th day after the required payment date for any other item.

**G.6.1.2** Any amount of an interest penalty which remains unpaid at the end of any 30-day period shall be added to the principal amount of the debt and thereafter interest penalties shall accrue on the added amount.

**G.6.2** Payments to Subcontractors

**G.6.2.1** The Contractor must take one of the following actions within 7 days of receipt of any amount paid to the Contractor by the District for work performed by any subcontractor under a contract:

- a) Pay the subcontractor for the proportionate share of the total payment received from the District that is attributable to the subcontractor for work performed under the contract; or
- b) Notify the District and the subcontractor, in writing, of the Contractor's intention to withhold all or part of the subcontractor's payment and state the reason for the nonpayment.

**G.6.2.2** The Contractor must pay any lower-tier subcontractor or supplier interest penalties on amounts due to the subcontractor or supplier beginning on the day after the payment is due and ending on the date on which the payment is made. Interest shall be calculated at the rate of 1% per month. No interest penalty shall be paid on the following if payment for the completed delivery of the item of property or service is made on or before:

- a) the 3rd day after the required payment date for meat or a meat product;
- b) the 5th day after the required payment date for an agricultural commodity; or
- c) the 15th day after the required payment date for any other item.

**G.6.2.3** Any amount of an interest penalty which remains unpaid by the Contractor at the end of any 30-day period shall be added to the principal amount of the debt to the subcontractor and thereafter interest penalties shall accrue on the added amount.

**G.6.2.4** A dispute between the Contractor and subcontractor relating to the amounts or entitlement of a subcontractor to a payment or a late payment interest penalty under the Quick Payment Act does not constitute a dispute to which the District of Columbia is a party. The District of Columbia may not be interpleaded in any judicial or administrative proceeding involving such a dispute.

**G.7 CONTRACTING OFFICER (CO)**

Contracts will be entered into and signed on behalf of the District only by contracting officers. The name, address and telephone number of the Contracting Officer is:

James Marshall  
Office of Contracting and Procurement  
441 4<sup>th</sup> Street NW, Suite 700S  
Washington, DC 20001

(202) 724-4197

**G.8 AUTHORIZED CHANGES BY THE CONTRACTING OFFICER**

**G.8.1** The Contracting Officer is the only person authorized to approve changes in any of the requirements of this contract.

**G.8.2** The Contractor shall not comply with any order, directive or request that changes or modifies the requirements of this contract, unless issued in writing and signed by the Contracting Officer.

**G.8.3** In the event the Contractor effects any change at the instruction or request of any person other than the Contracting Officer, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any cost increase incurred as a result thereof.

**G.9 CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE (COTR)**

**G.9.1** The COTR is responsible for general administration of the contract and advising the Contracting Officer as to the Contractor's compliance or noncompliance with the contract. In addition, the COTR is responsible for the day-to-day monitoring and supervision of the contract, of ensuring that the work conforms to the requirements of this contract and such other responsibilities and authorities as may be specified in the contract. The COTR for this contract is:

Karla Sumpter  
Associate Director, BRA  
D.C. Department of Human Resources  
441 4<sup>th</sup> Street NW, Suite 340N  
Washington, DC 20001  
(202) 442-7627

**G.9.2** The COTR shall not have authority to make any changes in the specifications or scope of work or terms and conditions of the contract.

**G.9.3** The Contractor may be held fully responsible for any changes not authorized in advance, in writing, by the Contracting Officer; may be denied compensation or other relief for any additional work performed that is not so authorized; and may also be required, at no additional cost to the District, to take all corrective action necessitated by reason of the unauthorized changes.

## **SECTION H: SPECIAL CONTRACT REQUIREMENTS**

### **H.1 HIRING OF DISTRICT RESIDENTS AS APPRENTICES AND TRAINEES**

**H.1.1.1** For all new employment resulting from this contract or subcontracts hereto, as defined in Mayor's Order 83-265 and implementing instructions, the Contractor shall use its best efforts to comply with the following basic goal and objectives for utilization of bona fide residents of the District of Columbia in each project's labor force:

**H.1.1.2** At least fifty-one (51) percent of apprentices and trainees employed shall be residents of the District of Columbia registered in programs approved by the District of Columbia Apprenticeship Council.

**H.1.1.3** The Contractor shall negotiate an Employment Agreement with the DOES for jobs created as a result of this contract. The DOES shall be the Contractor's first source of referral for qualified apprentices and trainees in the implementation of employment goals contained in this clause.

### **H.2 DEPARTMENT OF LABOR WAGE DETERMINATIONS**

The Contractor shall be bound by the Wage Determination 2005-2103, Revision 6, dated May 29, 2008, issued by the U.S. Department of Labor in accordance with the Service Contract Act (41 U.S.C. 351 et seq.) and incorporated herein as Section J.1.1 of this solicitation. The Contractor shall be bound by the wage rates for the term of the contract. If an option is exercised, the Contractor shall be bound by the applicable wage rate at the time of the option. If the option is exercised and the Contracting Officer obtains a revised wage determination, the revised wage determination is applicable for the option periods and the Contractor may be entitled to an equitable adjustment.

### **H.3 PUBLICITY**

The Contractor shall at all times obtain the prior written approval from the Contracting Officer before it, any of its officers, agents, employees or subcontractors, either during or after expiration or termination of the contract, make any statement, or issue any material, for publication through any medium of communication, bearing on the work performed or data collected under this contract.

### **H.4 FREEDOM OF INFORMATION ACT**

The District of Columbia Freedom of Information Act, at D.C. Official Code § 2-532 (a-3), requires the District to make available for inspection and copying any record produced or collected pursuant to a District contract with a private contractor to perform a public function, to the same extent as if the record were maintained by the agency on whose behalf the contract is made. If the Contractor receives a request for such information, the Contractor shall immediately send the request to the COTR designated in subsection G.9 who will provide the request to the FOIA Officer for the agency with programmatic responsibility in accordance with

the D.C. Freedom of Information Act. If the agency with programmatic responsibility receives a request for a record maintained by the Contractor pursuant to the contract, the COTR will forward a copy to the Contractor. In either event, the Contractor is required by law to provide all responsive records to the COTR within the timeframe designated by the COTR. The FOIA Officer for the agency with programmatic responsibility will determine the releasability of the records. The District will reimburse the Contractor for the costs of searching and copying the records in accordance with D.C. Official Code §2-532 and Chapter 4 of Title 1 of the D.C. Municipal Regulations.

## **H.5 51% DISTRICT RESIDENTS NEW HIRES REQUIREMENTS AND FIRST SOURCE EMPLOYMENT AGREEMENT**

**H.5.1** The Contractor shall comply with the First Source Employment Agreement Act of 1984, as amended, D.C. Official Code §2-219.01 et seq. (“First Source Act”).

**H.5.2** The Contractor shall enter into and maintain, during the term of the contract, a First Source Employment Agreement, (Section J.2.4) in which the Contractor shall agree that:

- (1) The first source for finding employees to fill all jobs created in order to perform this contract shall be the Department of Employment Services (“DOES”); and
- (2) The first source for finding employees to fill any vacancy occurring in all jobs covered by the First Source Employment Agreement shall be the First Source Register.

**H.5.3** The Contractor shall submit to DOES, no later than the 10th each month following execution of the contract, a First Source Agreement Contract Compliance Report (“contract compliance report”) verifying its compliance with the First Source Agreement for the preceding month. The contract compliance report for the contract shall include the:

- (2) Number of employees needed;
- (3) Number of current employees transferred;
- (4) Number of new job openings created;
- (5) Number of job openings listed with DOES;
- (6) Total number of all District residents hired for the reporting period and the cumulative total number of District residents hired; and
- (7) Total number of all employees hired for the reporting period and the cumulative total number of employees hired, including:
  - (a) Name;
  - (b) Social security number;
  - (c) Job title;
  - (d) Hire date;
  - (e) Residence; and
  - (f) Referral source for all new hires.

**H.5.4** If the contract amount is equal to or greater than \$100,000, the Contractor agrees that 51% of the new employees hired for the contract shall be District residents.

**H.5.5** With the submission of the Contractor's final request for payment from the District, the Contractor shall:

- (1) Document in a report to the Contracting Officer its compliance with the section H.5.4 of this clause; or
- (2) Submit a request to the Contracting Officer for a waiver of compliance with section H.5.4 and include the following documentation:
  - (a) Material supporting a good faith effort to comply;
  - (b) Referrals provided by DOES and other referral sources;
  - (c) Advertisement of job openings listed with DOES and other referral sources; and
  - (d) Any documentation supporting the waiver request pursuant to section H.5.6.

**H.5.6** The Contracting Officer may waive the provisions of section H.5.4 if the Contracting Officer finds that:

- (1) A good faith effort to comply is demonstrated by the Contractor;
- (2) The Contractor is located outside the Washington Standard Metropolitan Statistical Area and none of the contract work is performed inside the Washington Standard Metropolitan Statistical Area which includes the District of Columbia; the Virginia Cities of Alexandria, Falls Church, Manassas, Manassas Park, Fairfax, and Fredericksburg, the Virginia Counties of Fairfax, Arlington, Prince William, Loudoun, Stafford, Clarke, Warren, Fauquier, Culpeper, Spotsylvania, and King George; the Maryland Counties of Montgomery, Prince Georges, Charles, Frederick, and Calvert; and the West Virginia Counties of Berkeley and Jefferson.
- (3) The Contractor enters into a special workforce development training or placement arrangement with DOES; or
- (4) DOES certifies that there are insufficient numbers of District residents in the labor market possessing the skills required by the positions created as a result of the contract.

**H.5.7** Upon receipt of the contractor's final payment request and related documentation pursuant to sections H.5.5 and H.5.6, the Contracting Officer shall determine whether the Contractor is in compliance with section H.5.4 or whether a waiver of compliance pursuant to section H.5.6 is justified. If the Contracting Officer determines that the Contractor is in compliance, or that a waiver of compliance is justified, the Contracting Officer shall, within two business days of making the determination forward a copy of the determination to the Agency Chief Financial Officer and the COTR.

**H.5.8** Willful breach of the First Source Employment Agreement, or failure to submit the report pursuant to section H.5.5, or deliberate submission of falsified data, may be enforced by the Contracting Officer through imposition of penalties, including monetary fines of 5% of the total amount of the direct and indirect labor costs of the contract. The Contractor shall make payment to DOES. The Contractor may appeal to the D.C. Contract Appeals

Board as provided in the contract any decision of the Contracting Officer pursuant to this section H.5.8.

**H.5.9** The provisions of sections H.5.4 through H.5.8 do not apply to nonprofit organizations.

**H.6 PROTECTION OF PROPERTY**

The Contractor shall be responsible for any damage to the building, interior, or their approaches in delivering equipment covered by this contract.

**H.7 AMERICANS WITH DISABILITIES ACT OF 1990 (ADA)**

During the performance of the contract, the Contractor and any of its subcontractors shall comply with the ADA. The ADA makes it unlawful to discriminate in employment against a qualified individual with a disability.

See 42 U.S.C. §12101 et seq.

**H.8 SECTION 504 OF THE REHABILITATION ACT OF 1973, AS AMENDED**

During the performance of the contract, the Contractor and any of its subcontractors shall comply with Section 504 of the Rehabilitation Act of 1973, as amended. This Act prohibits discrimination against disabled people in federally funded program and activities. See 29 U.S.C. §794 et seq.

**H.9 DISTRICT RESPONSIBILITIES**

**H.9.1** The District will supply the Contractor with a weekly eligibility file, an extract from the HRMS.

**H.9.2** The District will circulate a customer satisfaction survey among program participants to evaluate the Contractor's overall customer service.

**H.10 RESERVED**

**H.11 Way to Work Amendment Act of 2006**

H.11.1 Except as described in Section H.15.8 below, Contractor shall comply with Title I of the Way to Work Amendment Act of 2006, effective June 9, 2006 (D.C. Law 16-118, D.C. Official Code § 2-220.01 *et seq.*) ("Living Wage Act of 2006"), for contracts for services in the amount of one-hundred thousand dollars (\$100,000) or more in a twelve (12) month period.

H.11.2 Contractor shall pay its employees and subcontractors who perform services under the Contract no less than the current living wage published on the OCP website at [www.ocp.dc.gov](http://www.ocp.dc.gov).

H.11.3 Contractor shall include in any subcontract for fifteen thousand dollars (\$15,000) or more a provision requiring the subcontractor to pay its employees who perform services under the contract no less than the current living wage rate.

H.11.4 The Department of Employment Services may adjust the living wage annually and the OCP will publish the current living wage rate on its website at [www.ocp.dc.gov](http://www.ocp.dc.gov).

H.11.5 Contractor shall provide a copy of the Fact Sheet attached as Attachment J.1.8 to each employee and subcontractor who performs services under the contract. Contractor shall also post the Notice attached as Attachment J.1.9 in a conspicuous place in its place of business. Contractor shall include in any subcontract for fifteen thousand dollars (\$15,000) or more a provision requiring the subcontractor to post the Notice in a conspicuous place in its place of business.

H.11.6 Contractor shall maintain its payroll records under the contract in the regular course of business for a period of at least three (3) years from the payroll date, and shall include this requirement in its subcontracts for fifteen thousand dollars (\$15,000) or more under the Contract.

H.11.7 The payment of wages required under the Living Wage Act of 2006 shall be consistent with and subject to the provisions of D.C. Official Code § 32-1301 *et seq.*

H.11.8 The requirements of the Living Wage Act of 2006 do not apply to:

H.11.8.1 Contracts or other agreements that are subject to higher wage level determinations required by federal law;

H.11.8.2 Existing and future collective bargaining agreements, provided, that the future collective bargaining agreement results in the employee being paid no less than the established living wage;

H.11.8.3 Contracts for electricity, telephone, water, sewer or other services provided by a regulated utility;

H.11.8.4 Contracts for services needed immediately to prevent or respond to a disaster or eminent threat to public health or safety declared by the Mayor;

H.11.8.5 Contracts or other agreements that provide trainees with additional services including, but not limited to, case management and job readiness services; provided that the trainees do not replace employees subject to the Living Wage Act of 2006;

H.11.8.6 An employee under twenty-two (22) years of age employed during a school vacation period, or enrolled as a full-time student, as defined by the respective institution, who is in high school or at an accredited institution of higher education and who works less than twenty-five (25) hours per week;

provided that he or she does not replace employees subject to the Living Wage Act of 2006;

H.11.8.7 Tenants or retail establishments that occupy property constructed or improved by receipt of government assistance from the District of Columbia; provided, that the tenant or retail establishment did not receive direct government assistance from the District;

H.11.8.8 Employees of nonprofit organizations that employ not more than fifty (50) individuals and qualify for taxation exemption pursuant to Section 501(c)(3) of the Internal Revenue Code of 1954, approved August 16, 1954 (68A Stat. 163; 26 U.S.C. § 501(c)(3));

H.11.8.9 Medicaid provider agreements for direct care services to Medicaid recipients, provided, that the direct care service is not provided through a home care agency, a community residence facility, or a group home for mentally retarded persons as those terms are defined in Section 2 of the Health-Care and Community Residence Facility, Hospice, and Home Care Licensure Act of 1983, effective February 24, 1984 (D.C. Law 5-48; D.C. Official Code § 44-501); and

H.11.8.10 Contracts or other agreements between MCOs and the Health Care Safety Net Administration or MAA to provide health services.

H.11.9 The Mayor may exempt a Contractor from the requirements of the Living Wage Act of 2006, subject to the approval of Council, in accordance with the provisions of Section 109 of the Living Wage Act of 2006.

## **H.12 HIPAA Compliance – Business Associate Agreement**

### H.12.1 Definitions

The following definitions shall apply to this Section H.20:

H.12.1.1 Business Associate. "Business Associate" shall mean Contractor.

H.12.1.2 Covered Entity. "Covered Entity" shall mean District, Department of Health, and Medical Assistance Administration.

H.12.1.3 Designated Record Set means:

H.12.1.3.1 A group of records maintained by or for a Covered Entity that is:

H.12.1.3.1.1 The medical records and billing records about individuals maintained by or for a covered health care provider;

H.12.1.3.1.2 The enrollment, payment, claims adjudication, and case or medical management record systems maintained by or for a health plan; or,

H.12.1.3.1.3 Used, in whole or in part, by or for Covered Entity to make decisions about individuals.

H.12.1.3.2 For purposes of this paragraph, the term record means any items, collection, or grouping of information that includes Protected Health Information and is maintained, collected, used, or disseminated by or for Covered Entity.

H.12.1.4 Individual shall have the same meaning as the term "individual" in 45 C.F.R. § 164.501 and shall include a person who qualifies as a personal representative in accordance with 45 C.F.R. § 164.502(g).

H.12.1.5 Privacy Rule. "Privacy Rule" shall mean the Standards for Privacy of Individually Identifiable Health Information at 45 C.F.R. part 160 and part 164, subparts A and E.

H.12.1.6 Protected Health Information. "Protected Health Information" shall have the same meaning as the term "protected health information" in 45 C.F.R. § 164.501, limited to the information created or received by Business Associate from or on behalf of Covered Entity.

H.12.1.7 Required By Law. "Required By Law" shall have the same meaning as the term "required by law" in 45 C.F.R. § 164.501.

H.12.1.8 Secretary. "Secretary" shall mean the Secretary of the Department of Health and Human Services or his/her designee.

## H.12.2 Obligations and Activities of Business Associate

H.12.2.1 Business Associate agrees to not use or disclose Protected Health Information other than as permitted or required by this HIPAA Privacy Compliance Clause (this Clause) or as Required by Law.

H.12.2.2 Business Associate agrees to use appropriate safeguards to prevent use or disclosure of the Protected Health Information other than as provided for by this Clause.

H.12.2.3 Business Associate agrees to mitigate, to the extent practicable, any harmful effect that is known to Business Associate of a use or disclosure of Protected Health Information by Business Associate in violation of the requirements of this Clause.

H.12.2.4 Business Associate agrees to report to the Covered Entity any use or disclosure of the Protected Health Information not provided for by this Clause of which it becomes aware.

H.12.2.5 Business Associate agrees to ensure that any Agent, including a subcontractor, to whom it provides Protected Health Information received from, or created or received by Business Associate on behalf of the Covered Entity, agrees to the same restrictions and conditions that apply through this Agreement to Business Associate with respect to such information.

H.12.2.6 Business Associate agrees to provide access, at the request of the Covered Entity, and in the time and manner as provided by the Covered Entity, to Protected Health Information in a Designated Record Set, to the Covered Entity or, as directed by Covered Entity, to an Individual in order to meet the requirements under 45 C.F.R. § 164.524.

H.12.2.8 Business Associate agrees to make any amendment(s) to Protected Health Information in a Designated Record Set that the Covered Entity directs or agrees to pursuant to 45 C.F.R. § 164.526 at the request of Covered Entity or an Individual, and in the time and manner specified by the Covered Entity.

H.12.2.9 Business Associate agrees to make internal practices, books, and records, including policies and procedures and Protected Health Information, relating to the use and disclosure of Protected Health Information received from, or created or received by Business Associate on behalf of the Covered Entity, available to the Covered Entity, or to the Secretary, in a time and manner specified by the Covered Entity or designated by the Secretary, for purposes of the Secretary determining Covered Entity's compliance with the Privacy Rule.

H.12.2.10 Business Associate agrees to document such disclosures of Protected Health Information and information related to such disclosures as would be required for the Covered Entity to respond to a request by an Individual for an accounting of disclosures of Protected Health Information in accordance with 45 C.F.R. § 164.528.

H.12.2.11 Business Associate agrees to provide to the Covered Entity or an Individual, in time and manner specified by the Covered Entity, information collected in accordance with this Section H.20, to permit the Covered Entity to respond to a request by an Individual for an accounting of disclosures of Protected Health Information in accordance with 45 C.F.R. § 164.528.

### H.12.3 Permitted Uses and Disclosures by Business Associate

H.12.3.1 Except as otherwise limited in this Clause, Business Associate may use or disclose Protected Health Information to perform functions, activities, or services for, or on behalf of, the Covered Entity as specified in the Contract provided that such use or disclosure would not violate the Privacy Rule if done by

the Covered Entity or the minimum necessary policies and procedures of the Covered Entity.

H.12.3.2 Except as otherwise limited in this Clause, Business Associate may use Protected Health Information for the proper management and administration of the Business Associate or to carry out the legal responsibilities of the Business Associate.

H.12.3.3 Except as otherwise limited in this Clause, Business Associate may disclose Protected Health Information for the proper management and administration of the Business Associate, provide that disclosures are Required By Law, or Business Associate obtains reasonable assurances from the person to whom the information is disclosed that it will remain confidential and used or further disclosed only as Required By Law or for the purpose for which it was disclosed to the person, and the person notifies the Business Associate of any instances of which it is aware in which the confidentiality of the information has been breached.

H.12.3.4 Except as otherwise limited in this Clause, Business Associate may use Protected Health Information to provide Data Aggregation services to the Covered Entity as permitted by 42 C.F.R. § 164.504(e)(2)(i)(B).

H.12.3.5 Business Associate may use Protected Health Information to report violations of law to appropriate Federal and State authorities, consistent with §42 C.F.R. § 164.502(j)(1).

## **SECTION I: CONTRACT CLAUSES**

### **I.1 APPLICABILITY OF STANDARD CONTRACT PROVISIONS**

The Standard Contract Provisions for use with District of Columbia Government Supplies and Services Contracts dated November 2004 (“SCP”) are incorporated as part of the contract resulting from this solicitation. To obtain a copy of the SCP go to [www.ocp.dc.gov](http://www.ocp.dc.gov), click on OCP Policies under the heading “Information”, then click on “Standard Contract Provisions – Supplies and Services Contracts”.

### **I.2 CONTRACTS THAT CROSS FISCAL YEARS**

Continuation of this contract beyond the current fiscal year is contingent upon future fiscal appropriations.

### **I.3 CONFIDENTIALITY OF INFORMATION**

All information obtained by the Contractor relating to any employee or customer of the District will be kept in absolute confidence and shall not be used by the Contractor in connection with any other matters, nor shall any such information be disclosed to any other person, firm, or corporation, in accordance with the District and Federal laws governing the confidentiality of records.

### **I.4 TIME**

Time, if stated in a number of days, will include Saturdays, Sundays, and holidays, unless otherwise stated herein.

### **I.5 INSURANCE**

- A. **GENERAL REQUIREMENTS.** The Contractor shall procure and maintain, during the entire period of performance under this contract, the types of insurance specified below. The Contractor shall submit a Certificate of Insurance giving evidence of the required coverage prior to issuance of award. All insurance shall be written with financially responsible companies authorized to do business in the District of Columbia or in the jurisdiction where the work is to be performed; have either an A.M. Best Company rating of A-VIII or higher, a Standard & Poor's rating of AA or higher, or a Moody's rating of Aa2 or higher. The Contractor shall require all subcontractors to carry the insurance required herein, or the Contractor may, at its option, provide the coverage for any or all subcontractors, and if so, the evidence of insurance submitted shall so stipulate. All policies (excluding Workers' Compensation and Professional Liability, if applicable) shall name the District as an additional insured with respect to work or services performed under the Contract. All policies shall provide that the insurance coverage provided hereunder will be primary and noncontributory with any other applicable insurance. All policies shall contain a waiver of subrogation in favor of the District of

Columbia. In no event shall work be performed until the required Certificates of Insurance signed by an authorized representative of the insurer(s) has been furnished. All policies shall provide that the Contracting Officer shall be given thirty (30) days prior written notice via certified mail in the event coverage is substantially changed, canceled or not renewed.

1. Certificate of Insurance Requirement. The policy description on the Certificate of Insurance form shall include the contract number, the contract award date (if available), the contract expiration date (if available), the name of the requesting agency, the name of the contracting officer, a brief description of the work to be performed, the job location, the District as an additional insured, and a waiver of subrogation.
2. Commercial General Liability Insurance. The Contractor shall provide evidence satisfactory to the Contracting Officer with respect to the operations performed, that it carries \$1,000,000 limits per occurrence; \$ 2,000,000 per aggregate; \$1,000,000 for products and completed operations; and \$1,000,000 for personal and advertising injury. The policy coverage shall be primary and non-contributory, shall contain the CGL 2503 per project endorsement, and shall include the District of Columbia as an additional insured.
3. Commercial General Liability Insurance. If the Contractor is providing insurance for a subcontractor, the Contractor shall provide evidence satisfactory to the Contracting Officer with respect to the operations performed, that it carries \$1,000,000 limits per occurrence; \$2,000,000 per aggregate; \$1,000,000 for products and completed operations; and \$1,000,000 for personal and advertising injury. The policy coverage shall be primary and non-contributory, shall contain the CGL 2503 per project endorsement, and shall include the District of Columbia as an additional insured.
4. Workers' Compensation Insurance. The Contractor shall provide Workers' Compensation insurance in accordance with the statutory mandates of the District of Columbia or the jurisdiction in which the contract is performed.
5. Employer's Liability Insurance. The Contractor shall provide employer's liability insurance as follows: \$1,000,000 per accident for injury; \$1,000,000 per employee for disease; and \$1,000,000 for policy disease limit.
6. Umbrella or Excess Liability Insurance. The Contractor shall provide umbrella or excess liability insurance as follows: \$2,000,000 per occurrence.
7. Professional Liability Insurance (Errors & Omissions). The Contractor (including but not limited to architects, attorneys, engineers, environmental consultants, and healthcare professionals) shall provide Professional Liability Insurance (Errors and Omissions) to cover liability resulting from any error or omission caused by the performance of professional services under this Contract.

8. The policy shall provide limits of \$1,000,000 per occurrence for each wrongful act and \$1,000,000 per aggregate for each wrongful act.
  9. The Contractor shall maintain this insurance for five (5) years following the District's final acceptance of the work. The policy shall cover the Contractor and its subcontractors of every tier, and shall identify the District as the Project Owner on the policy.
- B. DURATION. Except as proved in I.5.A.6, the Contractor shall carry all insurance until all contract work is accepted by the District. Each insurance policy shall contain a binding endorsement that: The insurer agrees that the Contracting Officer shall be given thirty (30) days prior written notice via certified mail in the event coverage is substantially changed, canceled or not renewed.
- C. CONTRACTOR'S PROPERTY. Contractors and subcontractor are solely responsible for any loss or damage to their personal property, including owned and leased equipment, whether such equipment is located at a project site or "in transit". This includes Contractor tools and equipment, scaffolding and temporary structures, and rented machinery, storage sheds or trailers placed on the project site.
- D. MEASURE OF PAYMENT. The District shall not make any separate measure or payment for the cost of insurance and bonds. The Contractor shall include all of the costs of insurance and bonds in the contract price.

## **I.6 RIGHTS IN DATA**

- I.6.1** "Data," as used herein, means recorded information, regardless of form or the media on which it may be recorded. The term includes technical data and computer software. The term does not include information incidental to contract administration, such as financial, administrative, cost or pricing, or management information.
- I.6.2** The term "Technical Data", as used herein, means recorded information, regardless of form or characteristic, of a scientific or technical nature. It may, for example, document research, experimental, developmental or engineering work, or be usable or used to define a design or process or to procure, produce, support, maintain, or operate material. The data may be graphic or pictorial delineations in media such as drawings or photographs, text in specifications or related performance or design type documents or computer printouts. Examples of technical data include research and engineering data, engineering drawings and associated lists, specifications, standards, process sheets, manuals, technical reports, catalog item identifications, and related information, and computer software documentation. Technical data does not include computer software or financial, administrative, cost and pricing, and management data or other information incidental to contract administration.
- I.6.3** The term "Computer Software", as used herein means computer programs and computer databases. "Computer Programs", as used herein means a series of instructions or statements in a form acceptable to a computer, designed to cause the computer to execute

an operation or operations. "Computer Programs" include operating systems, assemblers, compilers, interpreters, data management systems, utility programs, sort merge programs, and automated data processing equipment maintenance diagnostic programs, as well as applications programs such as payroll, inventory control and engineering analysis programs. Computer programs may be either machine-dependent or machine-independent, and may be general purpose in nature or designed to satisfy the requirements of a particular user.

- I.6.4** The term "computer databases", as used herein, means a collection of data in a form capable of being processed and operated on by a computer.
- I.6.5** All data first produced in the performance of this Contract shall be the sole property of the District. The Contractor hereby acknowledges that all data, including, without limitation, computer program codes, produced by Contractor for the District under this Contract, are works made for hire and are the sole property of the District; but, to the extent any such data may not, by operation of law, be works made for hire, Contractor hereby transfers and assigns to the District the ownership of copyright in such works, whether published or unpublished. The Contractor agrees to give the District all assistance reasonably necessary to perfect such rights including, but not limited to, the works and supporting documentation and the execution of any instrument required to register copyrights. The Contractor agrees not to assert any rights in common law or in equity in such data. The Contractor shall not publish or reproduce such data in whole or in part or in any manner or form, or authorize others to do so, without written consent of the District until such time as the District may have released such data to the public.
- I.6.6** The District will have restricted rights in data, including computer software and all accompanying documentation, manuals and instructional materials, listed or described in a license or agreement made a part of this contract, which the parties have agreed will be furnished with restricted rights, provided however, notwithstanding any contrary provision in any such license or agreement, such restricted rights shall include, as a minimum the right to:
- I.6.6.1** Use the computer software and all accompanying documentation and manuals or instructional materials with the computer for which or with which it was acquired, including use at any District installation to which the computer may be transferred by the District;
- I.6.6.2** Use the computer software and all accompanying documentation and manuals or instructional materials with a backup computer if the computer for which or with which it was acquired is inoperative;
- I.6.6.3** Copy computer programs for safekeeping (archives) or backup purposes; and modify the computer software and all accompanying documentation and manuals or instructional materials, or combine it with other software, subject to the provision that the modified portions shall remain subject to these restrictions.
- I.6.7** The restricted rights set forth in section I.5.6 are of no effect unless

- (i) the data is marked by the Contractor with the following legend:

**RESTRICTED RIGHTS LEGEND**

Use, duplication, or disclosure is subject to restrictions stated in Contract No. \_\_\_\_\_  
With \_\_\_\_\_ (Contractor's Name); and

- (ii) If the data is computer software, the related computer software documentation includes a prominent statement of the restrictions applicable to the computer software. The Contractor may not place any legend on the computer software indicating restrictions on the District's rights in such software unless the restrictions are set forth in a license or agreement made a part of the contract prior to the delivery date of the software. Failure of the Contractor to apply a restricted rights legend to such computer software shall relieve the District of liability with respect to such unmarked software.

- I.6.8** In addition to the rights granted in Section I.5.6 above, the Contractor hereby grants to the District a nonexclusive, paid-up license throughout the world, of the same scope as restricted rights set forth in Section I.5.6 above, under any copyright owned by the Contractor, in any work of authorship prepared for or acquired by the District under this contract. Unless written approval of the Contracting Officer is obtained, the Contractor shall not include in technical data or computer software prepared for or acquired by the District under this contract any works of authorship in which copyright is not owned by the Contractor without acquiring for the District any rights necessary to perfect a copyright license of the scope specified in the first sentence of this paragraph.
- I.6.9** Whenever any data, including computer software, are to be obtained from a subcontractor under this contract, the Contractor shall use this clause, I.5, Rights in Data, in the subcontract, without alteration, and no other clause shall be used to enlarge or diminish the District's or the Contractor's rights in that subcontractor data or computer software which is required for the District.
- I.6.10** For all computer software furnished to the District with the rights specified in Section I.5.5, the Contractor shall furnish to the District, a copy of the source code with such rights of the scope specified in Section I.5.5. For all computer software furnished to the District with the restricted rights specified in Section I.5.6, the District, if the Contractor, either directly or through a successor or affiliate shall cease to provide the maintenance or warranty services provided the District under this contract or any paid-up maintenance agreement, or if Contractor should be declared bankrupt or insolvent by a court of competent jurisdiction, shall have the right to obtain, for its own and sole use only, a single copy of the then current version of the source code supplied under this contract, and a single copy of the documentation associated therewith, upon payment to the person in control of the source code the reasonable cost of making each copy.
- I.6.11** The Contractor shall indemnify and save and hold harmless the District, its officers, agents and employees acting within the scope of their official duties against any liability,

including costs and expenses, (i) for violation of proprietary rights, copyrights, or rights of privacy, arising out of the publication, translation, reproduction, delivery, performance, use or disposition of any data furnished under this contract, or (ii) based upon any data furnished under this contract, or based upon libelous or other unlawful matter contained in such data.

**I.6.12** Nothing contained in this clause shall imply a license to the District under any patent, or be construed as affecting the scope of any license or other right otherwise granted to the District under any patent.

**I.6.13** Paragraphs I.5.6, I.5.7, I.5.8, I.5.11 and I.5.12 above are not applicable to material furnished to the Contractor by the District and incorporated in the work furnished under contract, provided that such incorporated material is identified by the Contractor at the time of delivery of such work

## **I.7 OTHER CONTRACTORS**

The Contractor shall not commit or permit any act that will interfere with the performance of work by another District contractor or by any District employee.

## **I.8 SUBCONTRACTS**

The Contractor hereunder shall not subcontract any of the Contractor's work or services to any subcontractor without the prior written consent of the Contracting Officer. Any work or service so subcontracted shall be performed pursuant to a subcontract agreement, which the District will have the right to review and approve prior to its execution by the Contractor. Any such subcontract shall specify that the Contractor and the subcontractor shall be subject to every provision of this contract. Notwithstanding any such subcontract approved by the District, the Contractor shall remain liable to the District for all Contractor's work and services required hereunder.

## **I.9 EQUAL EMPLOYMENT OPPORTUNITY**

In accordance with the District of Columbia Administrative Issuance System, Mayor's Order 85-85 dated June 10, 1985, the forms for completion of the Equal Employment Opportunity Information Report are incorporated herein as Section J.2.2. An award cannot be made to any offeror who has not satisfied the equal employment requirements.

## **I.10 ORDER OF PRECEDENCE**

Any inconsistency in this solicitation shall be resolved by giving precedence in the following order: the Supplies or Services and Price/Cost Section (Section B), Specifications/Work Statement (Section C), the Special Contract Requirements (Section H), the Contract Clauses (Section I), and the SCP.

**I.11 CONTRACTS IN EXCESS OF ONE MILLION DOLLARS**

Any contract in excess of \$1,000,000 shall not be binding or give rise to any claim or demand against the District until approved by the Council of the District of Columbia and signed by the Contracting Officer.

## **SECTION J: LIST OF ATTACHMENTS**

### **J.1 ATTACHMENTS**

- J.1.1** Standard Contract Provisions (March 2007)
- J.1.2** US DOL Wage Determination No. 2005-2103, Revision No. 6
- J.1.3** E.E.O. Information and Mayor's Order 85-85
- J.1.4** Tax Certification Affidavit
- J.1.5** First Source Employment Agreement
- J.1.6** Cost/Price Data Package
- J.1.7** Performance Evaluation Form
- J.1.8** Living Wage Act Fact Sheet
- J.1.9** Living Wage Act Notice

**SECTION K: REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS**

**K.1 AUTHORIZED NEGOTIATORS**

The offeror represents that the following persons are authorized to negotiate on its behalf with the District in connection with this request for proposals: (list names, titles, and telephone numbers of the authorized negotiators).

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**K.2 TYPE OF BUSINESS ORGANIZATION**

**K.2.1** The offeror, by checking the applicable box, represents that

(a) It operates as:

a corporation incorporated under the laws of the State of: \_\_\_\_\_  
an individual,  
a partnership,  
a nonprofit organization, or  
a joint venture.

(b) If the offeror is a foreign entity, it operates as:

an individual,  
a joint venture, or  
a corporation registered for business in \_\_\_\_\_  
(Country)

**K.3 CERTIFICATION AS TO COMPLIANCE WITH EQUAL OPPORTUNITY OBLIGATIONS**

Mayor's Order 85-85, "Compliance with Equal Opportunity Obligations in Contracts", dated June 10, 1985 and the Office of Human Rights' regulations, Chapter 11, "Equal Employment Opportunity Requirements in Contracts", promulgated August 15, 1986 (4 DCMR Chapter 11, 33 DCR 4952) are included as a part of this solicitation and require the following certification for contracts subject to the order. Failure to complete the certification may result in rejection of the offeror for a contract subject to the order. I hereby certify that I am fully aware of the content of the Mayor's Order 85-85 and the Office of Human Rights' regulations, Chapter 11, and agree to comply with them in performance of this contract.

Offeror \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_

Offeror \_\_\_ has \_\_\_ has not participated in a previous contract or subcontract subject to the Mayor's Order 85-85. Offeror \_\_\_ has \_\_\_ has not filed all required compliance reports, and representations indicating submission of required reports signed by proposed subofferors. (The above representations need not be submitted in connection with contracts or subcontracts which are exempt from the Mayor's Order.)

**K.4 BUY AMERICAN CERTIFICATION**

The offeror hereby certifies that each end product, except the end products listed below, is a domestic end product (See Clause 23 of the SCP, "Buy American Act"), and that components of unknown origin are considered to have been mined, produced, or manufactured outside the United States.

\_\_\_\_\_ EXCLUDED END PRODUCTS  
\_\_\_\_\_ COUNTRY OF ORIGIN

**K.5 DISTRICT EMPLOYEES NOT TO BENEFIT CERTIFICATION**

Each offeror shall check one of the following:

\_\_\_\_\_ No person listed in Clause 13 of the SCP, "District Employees Not To Benefit" will benefit from this contract.

\_\_\_\_\_ The following person(s) listed in Clause 13 may benefit from this contract. For each person listed, attach the affidavit required by Clause 13 of the SCP.

\_\_\_\_\_

## **K.6 CERTIFICATION OF INDEPENDENT PRICE DETERMINATION**

- (a) Each signature of the offeror is considered to be a certification by the signatory that:
- (1) The prices in this contract have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any offeror or competitor relating to:
    - (I) those prices
    - (II) the intention to submit a contract, or
    - (III) the methods or factors used to calculate the prices in the contract.
  - (2) The prices in this contract have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before contract opening unless otherwise required by law; and
  - (3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit a contract for the purpose of restricting competition.
- (b) Each signature on the offer is considered to be a certification by the signatory that the signatory:
- (1) Is the person in the offeror's organization responsible for determining the prices being offered in this contract, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; or
  - (2) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above:

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***(insert full name of person(s) in the organization responsible for determining the prices offered in this Contract and the title of his or her position in the offeror's organization);***
- (I) As an authorized agent, does certify that the principals named in subdivision (b)(2) have not participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above;
  - (II) and as an agent, has not participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above.
- (c) If the offeror deletes or modifies subparagraph (a)(2) above, the offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.

**K.7 TAX CERTIFICATION**

Each offeror must submit with its offer, a sworn Tax Certification Affidavit, incorporated herein as Attachment J.1.4.

## **SECTION L: INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERORS**

### **L.1 CONTRACT AWARD**

#### **L.1.1 Most Advantageous to the District**

The District intends to award a single contract resulting from this solicitation to the responsible offeror whose offer conforms to the solicitation will be most advantageous to the District, cost or price, technical and other factors, specified elsewhere in this solicitation considered.

#### **L.1.2 Initial Offers**

The District may award contracts on the basis of initial offers received, without discussion. Therefore, each initial offer should contain the offeror's best terms from a standpoint of cost or price, technical and other factors.

### **L.2 PROPOSAL FORM, ORGANIZATION AND CONTENT**

One (1) original and five (5) copies of the written proposals shall be submitted in two parts, titled "Technical Proposal" and "Price Proposal". Proposals shall be typewritten in 12 point font size on 8.5" by 11" bond paper. Telephonic, telegraphic, and facsimile proposals will not be accepted. Each proposal shall be submitted in a sealed envelope conspicuously marked: "Proposal in Response to Solicitation No. *(insert solicitation number, title and name of offeror)*".

*(Offerors are directed to the specific proposal evaluation criteria found in Section M of this solicitation, Evaluation Factors. The Offeror shall respond to each factor in a way that will allow the District to evaluate the Offeror's response. The Offeror shall submit information in a clear, concise, factual and logical manner providing a comprehensive description of program supplies and services delivery thereof. The information requested below for the technical proposal shall facilitate evaluation and best value source selection for all proposals. The technical proposal must contain sufficient detail to provide a clear and concise representation of the requirements in Section C.)*

#### **L.2.1 Technical Proposal**

##### **L.2.1.1 Technical Approach and Capability**

The Offeror's proposal shall:

- a) Contain a narrative that demonstrates the Offeror's comprehension of the District's requirements as well as showcases the Offeror's knowledge and application of pertinent laws and regulations.
- b) Include a description of the functionality and capabilities, security protocol and limitations of the Offeror's web-based system.
- c) Provide a conceptual timeline for implementing the program.
- d) Contains a management and technical staffing plan that summarizes relevant qualifications and experience of staff to perform the required services.
- e) Provide a conceptual procedure for resolving inquiries from program participants.
- f) Include a description of the Offeror's reporting capabilities.
- g) Identify any activities to be fulfilled by subcontractors and provide subcontractor agreements, as applicable.

**L.2.1.2 Past Performance and Previous Experience**

The Offeror's proposal shall:

- a) Include the name, address, email address, and telephone number of three (3) clients for which the Offeror has provided services similar in size and scope as those described in Section C.
- b) List the following information for contracts and subcontracts under which Offeror has performed work similar to that identified in this RFP
  1. Name of contracting activity;
  2. Contract number;
  3. Contract type;
  4. Contract duration (or Period);
  5. Total contract value;
  6. Type of work performed;
  7. Contracting Officer's Name, Address and Telephone;
  8. Project Manager's Name, Address and Telephone.
- c) Offeror shall provide a performance evaluation provided in Attachment J.1.7 for at a minimum three of the contracts and subcontracts listed in b above.

**L.2.1.3 Attachments and Certifications**

The Offeror shall complete and provide attachments J.1.4, J.1.5, and J.1.6 of this solicitation and each of the certifications contained in Section K.

## **L.2.2 Price Proposal**

The Offeror's Price Proposal shall be submitted under separate cover and contain the following:

- a) Completed Price Schedule Section B.2
- b) Cost/price certification and Cost/Price Data (Attachment J.1.6)
- c) Price proposal narrative to explain and describe price proposal elements, as applicable

## **L.3 PROPOSAL SUBMISSION DATE AND TIME, AND LATE SUBMISSIONS, LATE MODIFICATIONS, WITHDRAWAL OR MODIFICATION OF PROPOSALS AND LATE PROPOSALS**

### **L.3.1 Proposal Submission**

Proposals must be submitted no later than **December 29, 2008, 2:00pm** as specified on page 1. Proposals, modifications to proposals, or requests for withdrawals that are received in the designated District office after the exact local time specified above, are "late" and shall be considered only if they are received before the award is made and one (1) or more of the following circumstances apply:

- (a) The proposal or modification was sent by registered or certified mail not later than the fifth (5th) day before the date specified for receipt of offers;
- (b) The proposal or modification was sent by mail and it is determined by the Contracting Officer that the late receipt at the location specified in the solicitation was caused by mishandling by the District, or
- (c) The proposal is the only proposal received.

### **L.3.2 Withdrawal or Modification of Proposals**

An offeror may modify or withdraw its proposal upon written, telegraphic notice, or facsimile transmission if received at the location designated in the solicitation for submission of proposals, but not later than the closing date for receipt of proposals.

### **L.3.3 Postmarks**

The only acceptable evidence to establish the date of a late proposal, late modification or late withdrawal sent either by registered or certified mail shall be a U.S. or Canadian

Postal Service postmark on the wrapper or on the original receipt from the U.S. or Canadian Postal Service. If neither postmark shows a legible date, the proposal, modification or request for withdrawal shall be deemed to have been mailed late. When the postmark shows the date but not the hour, the time is presumed to be the last minute of the date shown. If no date is shown on the postmark, the proposal shall be considered late unless the offeror can furnish evidence from the postal authorities of timely mailing.

#### **L.3.4 Late Modifications**

A late modification of a successful proposal, which makes its terms more favorable to the District, shall be considered at any time it is received and may be accepted.

#### **L.3.5 Late Proposals**

A late proposal, late modification or late request for withdrawal of an offer that is not considered shall be held unopened, unless opened for identification, until after award and then retained with unsuccessful offers resulting from this solicitation.

#### **L.4 EXPLANATION TO PROSPECTIVE OFFERORS**

If a prospective offeror has any questions relative to this solicitation, the prospective offeror shall submit the question in writing to the contact person, identified on page one. The prospective offeror shall submit questions no later than 10 days prior to the closing date and time indicated for this solicitation. The District will not consider any questions received less than 10 days before the date set for submission of proposals. The District will furnish responses promptly to all other prospective offerors. An amendment to the solicitation will be issued if that information is necessary in submitting offers, or if the lack of it would be prejudicial to any other prospective offerors. Oral explanations or instructions given before the award of the contract will not be binding.

#### **L.5 FAILURE TO SUBMIT OFFERS**

Recipients of this solicitation not responding with an offer should not return this solicitation. Instead, they should advise the Contracting Officer, Jim Marshall, Office of Contracting and Procurement, 441 4<sup>th</sup> Street, NW, Suite 703 South, 202-724-4197, by letter or postcard whether they want to receive future solicitations for similar requirements. It is also requested that such recipients advise the Contracting Officer of the reason for not submitting a proposal in response to this solicitation. If a recipient does not submit an offer and does not notify the Contracting Officer that future solicitations are desired, the recipient's name may be removed from the applicable mailing list.

## **L.6 RESTRICTION ON DISCLOSURE AND USE OF DATA**

**L.6.1** Offerors who include in their proposal data that they do not want disclosed to the public or used by the District except for use in the procurement process shall mark the title page with the following legend:

"This proposal includes data that shall not be disclosed outside the District and shall not be duplicated, used or disclosed in whole or in part for any purpose except for use in the procurement process.

If, however, a contract is awarded to this offeror as a result of or in connection with the submission of this data, the District will have the right to duplicate, use, or disclose the data to the extent consistent with the District's needs in the procurement process. This restriction does not limit the District's rights to use, without restriction, information contained in this proposal if it is obtained from another source. The data subject to this restriction are contained in sheets (insert page numbers or other identification of sheets)."

**L.6.2** Mark each sheet of data it wishes to restrict with the following legend:

"Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal."

## **L.7 PROPOSALS WITH OPTION YEARS**

The offeror shall include option year prices in its price/cost proposal. An offer may be determined to be unacceptable if it fails to include option year pricing.

## **L.8 PROPOSAL PROTESTS**

Any actual or prospective offeror or contractor who is aggrieved in connection with the solicitation or award of a contract, must file with the D.C. Contract Appeals Board (Board) a protest no later than 10 business days after the basis of protest is known or should have been known, whichever is earlier. A protest based on alleged improprieties in a solicitation which are apparent at the time set for receipt of initial proposals shall be filed with the Board prior to the time set for receipt of initial proposals. In procurements in which proposals are requested, alleged improprieties which do not exist in the initial solicitation, but which are subsequently incorporated into the solicitation, must be protested no later than the next closing time for receipt of proposals following the incorporation. The protest shall be filed in writing, with the Contract Appeals Board, 717 14th Street, N.W., Suite 430, Washington, D.C. 20004. The aggrieved person shall also mail a copy of the protest to the Contracting Officer for the solicitation.

## **L.9 SIGNING OF OFFERS**

The offeror shall sign the offer and print or type its name on the Solicitation, Offer and Award form of this solicitation. Offers signed by an agent shall be accompanied by

evidence of that agent's authority, unless that evidence has been previously furnished to the Contracting Officer.

**L.10 UNNECESSARILY ELABORATE PROPOSALS**

Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective response to this solicitation are not desired and may be construed as an indication of the offeror's lack of cost consciousness. Elaborate artwork, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor desired.

**L.11 RETENTION OF PROPOSALS**

All proposal documents will be the property of the District and retained by the District, and therefore will not be returned to the offerors.

**L.12 PROPOSAL COSTS**

The District is not liable for any costs incurred by the offerors in submitting proposals in response to this solicitation.

**L.13 ELECTRONIC COPY OF PROPOSALS FOR FREEDOM OF INFORMATION ACT REQUESTS**

In addition to other proposal submission requirements, the offeror must submit an electronic copy of its proposal, redacted in accordance with any applicable exemptions from disclosure in D.C. Official Code § 2-534, in order for the District to comply with Section 2-536(b) that requires the District to make available electronically copies of records that must be made public. The District's policy is to release documents relating to District proposals following award of the contract, subject to applicable FOIA exemption under Section 2-534(a)(1).

**L.14 CERTIFICATES OF INSURANCE**

The Contractor shall submit certificates of insurance giving evidence of the required coverages as specified in Section I.8 prior to commencing work. Evidence of insurance shall be submitted within three (3) days of contract award to:

James Marshall  
Office of Contracting and Procurement  
441 4<sup>th</sup> Street NW, Suite 700S  
Washington, DC 20001  
(202) 724-4197  
jim.marshall@dc.gov

### **L.15 ACKNOWLEDGMENT OF AMENDMENTS**

The offeror shall acknowledge receipt of any amendment to this solicitation (a) by signing and returning the amendment; (b) by identifying the amendment number and date in the space provided for this purpose in Section A, Solicitation, Offer and Award form; or (c) by letter or telegram including mailgrams. The District must receive the acknowledgment by the date and time specified for receipt of offers. Offerors' failure to acknowledge an amendment may result in rejection of the offer.

### **L.16 BEST AND FINAL OFFERS**

If, subsequent to receiving original proposals, negotiations are conducted, all offerors within the competitive range will be so notified and will be provided an opportunity to submit written best and final offers at the designated date and time. Best and Final Offers will be subject to the Late Submissions, Late Modifications and Late Withdrawals of Proposals provision of the solicitation. After receipt of best and final offers, no discussions will be reopened unless the Contracting Officer determines that it is clearly in the District's best interest to do so, e.g., it is clear that information available at that time is inadequate to reasonably justify Contractor selection and award based on the best and final offers received. If discussions are reopened, the Contracting Officer shall issue an additional request for best and final offers to all offerors still within the competitive range.

### **L.17 LEGAL STATUS OF OFFEROR**

Each proposal must provide the following information:

**L.17.1** Name, address, telephone number and federal tax identification number of offeror;

**L.17.2** A copy of each District of Columbia license, registration or certification that the offeror is required by law to obtain. This mandate also requires the offeror to provide a copy of the executed "Clean Hands Certification" that is referenced in D.C. Official Code §47-2862 (2001), if the offeror is required by law to make such certification. If the offeror is a corporation or partnership and does not provide a copy of its license, registration or certification to transact business in the District of Columbia, the offer shall certify its intent to obtain the necessary license, registration or certification prior to contract award or its exemption from such requirements; and

**L.17.3** If the offeror is a partnership or joint venture, the names and addresses of the general partners or individual members of the joint venture, and copies of any joint venture or teaming agreements.

### **L.18 FAMILIARIZATION WITH CONDITIONS**

Offerors shall thoroughly familiarize themselves with the terms and conditions of this solicitation, acquainting themselves with all available information regarding difficulties

which may be encountered, and the conditions under which the work is to be accomplished. Contractors will not be relieved from assuming all responsibility for properly estimating the difficulties and the cost of performing the services required herein due to their failure to investigate the conditions or to become acquainted with all information, schedules and liability concerning the services to be performed.

#### **L.19 STANDARDS OF RESPONSIBILITY**

The prospective contractor must demonstrate to the satisfaction of the District the capability in all respects to perform fully the contract requirements; therefore, the prospective contractor must submit the documentation listed below, within five (5) days of the request by the District.

- L.19.1** Evidence of adequate financial resources, credit or the ability to obtain such resources as required during the performance of the contract.
- L.19.2** Evidence of the ability to comply with the required or proposed delivery or performance schedule, taking into consideration all existing commercial and governmental business commitments.
- L.19.3** Evidence of the necessary organization, experience, accounting and operational control, technical skills or the ability to obtain them.
- L.19.4** Evidence of compliance with the applicable District licensing and tax laws and regulations.
- L.19.5** Evidence of a satisfactory performance record, record of integrity and business ethics.
- L.19.6** Evidence of the necessary production, construction and technical equipment and facilities or the ability to obtain them.
- L.19.7** Evidence of other qualifications and eligibility criteria necessary to receive an award under applicable laws and regulations
- L.19.8** If the prospective contractor fails to supply the information requested, the Contracting Officer shall make the determination of responsibility or nonresponsibility based upon available information. If the available information is insufficient to make a determination of responsibility, the Contracting Officer shall determine the prospective contractor to be not responsible.

## **SECTION M: EVALUATION FACTORS**

### **M.1 EVALUATION FOR AWARD**

The contract will be awarded to the responsible offeror whose offer is most advantageous to the District, based upon the evaluation criteria specified below. Thus, while the points in the evaluation criteria indicate their relative importance, the total scores will not necessarily be determinative of the award. Rather, the total scores will guide the District in making an intelligent award decision based upon the evaluation criteria.

### **M.2 TECHNICAL RATING**

**M.2.1** The Technical Rating Scale is identified in Table 9, below:

**Table 9. TECHNICAL RATING SCALE**

<b>Numeric Rating</b>	<b>Adjective</b>	<b>Description</b>
0	Unacceptable	Fails to meet minimum requirements; e.g., no demonstrated capacity, major deficiencies which are not correctable; offeror did not address the factor.
1	Poor	Marginally meets minimum requirements; major deficiencies which may be correctable.
2	Minimally Acceptable	Marginally meets minimum requirements; minor deficiencies which may be correctable.
3	Acceptable	Meets requirements; no deficiencies.
4	Good	Meets requirements and exceeds some requirements; no deficiencies.
5	Excellent	Exceeds most, if not all requirements; no deficiencies.

For example, if a sub factor has a point evaluation of 0 to 6 points, and (using the Technical Rating Scale) the District evaluates as "good" the part of the proposal applicable to the sub factor, the score for the sub factor is 4.8 (4/5 of 6). The sub factor scores will be added together to determine the score for the factor level.

### **M.3 EVALUATION CRITERIA**

Proposals will be evaluated based on the following technical evaluation factors listed in descending order of importance.

#### **M.3.1 TECHNICAL CRITERIA (80 Points)**

##### **M.3.1.1 Technical Approach and Capability (50 points)**

The Offeror's proposal demonstrated a profound understanding of the District's requirements as described in Section C of this solicitation. What's more, the Offeror's proposal underscores the functionality and capabilities, security protocol and limitations of its web-based system. It too delineated an implementation timeline, management and technical staffing plan (summarizing relevant qualifications and experience), outlines a procedure for resolving inquiries from program participants, showcases reporting capabilities, and identifies any activities to be fulfilled by subcontractors.

##### **M.3.1.2 Past Performance and Previous Experience (30 points)**

The Offeror has demonstrated that it has successfully provided comparable services to clients of the Districts magnitude over the past five (5) years.

#### **M.3.2 PRICE CRITERIA (20 Points)**

The price evaluation will be objective. The offeror with the lowest price will receive the maximum price points. All other proposals will receive a proportionately lower total score. The following formula will be used to determine each offeror's evaluated price score:

$$\frac{\text{Lowest price proposal}}{\text{Price of proposal being evaluated}} \times \text{weight} = \text{Evaluated price score}$$

#### **M.3.3 PREFERENCE (12 Points)**

#### **M.3.4 TOTAL (112 Points)**

### **M.4 EVALUATION OF OPTION YEARS**

The District will evaluate offers for award purposes by evaluating the total price for all options as well as the base year. Evaluation of options shall not obligate the District to exercise them. The total District's requirements may change during the option years. Quantities to be awarded will be determined at the time each option is exercised.

**M.5 CLAUSES APPLICABLE TO ALL SET-ASIDE OR OPEN MARKET SOLICITATIONS OR OPEN MARKET WITH SET-ASIDE**

**M.5.1 Preference for Local Businesses, Disadvantaged Businesses, Resident Business Ownerships or Businesses Operation in an Enterprise Zone**

**a. General Preferences**

Under the provisions of D.C. Law 13-169, “Equal Opportunity for Local, Small, or Disadvantaged Business Enterprises Amendment Act of 2000” (the “Act”, as used in this section), the District shall apply preferences in evaluating offers from businesses that are local, disadvantaged, resident business ownership or located in an enterprise zone of the District of Columbia.

For evaluation purposes, the allowable preferences under the Act for this procurement are as follows:

- 1) Four percent reduction in the bid price or the addition of four points on a 100-point scale for a local business enterprise (LBE) certified by the Local Business Opportunity Commission (LBOC);
- 2) Three percent reduction in the bid price or the addition of three points on a 100-point scale for a disadvantaged business enterprise (DBE) certified by the LBOC;
- 3) Three percent reduction in the bid price or the addition of three points on a 100-point scale for a resident business ownership (RBO), as defined in Section 2 (a)(8A) of the Act, and certified by the LBOC; and
- 4) Two percent reduction in the bid price or the addition of two points on a 100-point scale for a business located in an enterprise zone, as defined in Section 2(5) of D.C. Law 12-268 and in 27 DCMR 899, 39 DCR 9087-9088 (December 4, 1992).

Any prime contractor that is a LBE certified by the LBOC will receive a four percent (4%) reduction in bid price for a bid submitted by the LBE in response to an Invitation for Bids (IFB) or the addition of four points on a 100-point scale added to the overall score for bids submitted by the LBE in response to a Request for Proposals (RFP).

Any prime contractor that is a DBE certified by the LBOC will receive a three percent (3%) reduction in the bid price for a bid submitted by the DBE in response to an IFB or the addition of three points on a 100-point scale added to the overall score for proposals submitted by the DBE in response to a RFP.

Any prime contractor that is a RBO certified by the LBOC will receive a three percent (3%) reduction in the bid price for a bid submitted by the RBO in response to an IFB or the addition of three points on a 100-point scale added to the overall score for proposals submitted by the RBO in response to a RFP.

Any prime contractor that is a business enterprise located in an enterprise zone will receive a two percent (2%) reduction in bid price for a bid submitted by such business enterprise in response to an IFB or the addition of two points on a 100-point scale added to the overall score for proposals submitted by such business in response to a RFP.

**b. Preferences for Subcontracting in Open Market Solicitations with No LBE, DBE, RBO Subcontracting Set Aside**

The preferences for subcontracting in open market solicitations where there is no LBE, DBE or RBO subcontracting set aside are as follows:

- 1) If the prime contractor is not a certified LBE, certified DBE, certified RBO or a business located in the enterprise in an enterprise zone, the District will award the above-stated preferences by reducing the bid price or by increasing the points proportionally based on the total dollar value of the bid or proposal that is designated by the prime contractor for subcontracting with a certified LBE, DBE, RBO or business located in an enterprise zone.
- 2) If the prime contractor is a joint venture that is not a certified LBE, certified DBE or certified RBO joint venture, or if the prime contractor is a joint venture that includes a business in an enterprise zone but such business located in an enterprise zone does not own and control at least fifty-one percent (51%) of the joint venture, the District will award the above-stated preferences by reducing the bid price or by increasing the points proportionally in the proposal based on the total dollar value of the bid or proposal that is designated by the prime contractor for a certified LBE, DBE, RBO or business located in an enterprise zone, for participation in the joint venture.

**For Example:**

If a non-certified prime contractor subcontracts with a certified local business enterprise for a percentage of the work to be performed on an RFP, the calculation of the percentage points to be added during evaluation would be according to the following formula:

$$\frac{\text{Amount of Subcontract}}{\text{Amount of Contract}} \times 4^* = \text{Points Awarded for Evaluating LSDBE Subcontracting}$$

**\*Note: Equivalent of four (4) points on a 100 point scale**

The maximum total preference under the act of this procurement is twelve percent (12%) for bids submitted in response to an IFB or the equivalent of twelve (12) points on a 100-point scale for proposals submitted in response to a RFP. Any prime contractor receiving the full bid price reduction or point addition to its overall score for a particular preference will not receive any additional bid price reduction or points for further participation on a subcontracting level for that particular preference.

However, the prime contractor shall receive a further proportional bid price reduction or point addition on a different preference for participation on a subcontracting level for that different preference. For example, if a LBE prime contractor receives the four percent bid price reduction or the equivalent of four points on a 100-point scale, the LBE prime contractor does not receive a further price reduction or additional points if such contractor proposes subcontracting with an LBE. However, if this same LBE prime contractor proposes subcontracting with a DBE, the LBE prime contractor receives a further proportional bid price reduction or point addition for the DBE participation on the subcontracting level.

**M.6 EVALUATION OF PROMPT PAYMENT DISCOUNT**

**M.6.1** Prompt payment discounts shall not be considered in the evaluation of offers. However, any discount offered will form a part of the award and will be taken by the District if payment is made within the discount period specified by the offeror.

**M.6.2** In connection with any discount offered, time will be computed from the date of delivery of the supplies to carrier when delivery and acceptance are at point of origin, or from date of delivery at destination when delivery, installation and acceptance are at that, or from the date correct invoice or voucher is received in the office specified by the District, if the latter date is later than date of delivery. Payment is deemed to be made for the purpose of earning the discount on the date of mailing of the District check.