

REQUEST FOR QUOTATIONS (RFQ) (THIS IS NOT AN ORDER)				PAGE OF 1	PAGES 14
1. RFQ NO. RFQ 2007-R-0130	2. DATE ISSUED September 18, 2007	3. REQUISITION NO. RQ360020	4. TYPE OF MARKET <input type="checkbox"/> Open <input checked="" type="checkbox"/> Set Aside <input type="checkbox"/> Open with Subcontracting Set Aside		
5A. ISSUED BY: Government of the District of Columbia (District) Office of Contracting and Procurement Information Technology Group 441 4 th Street N.W., Suite 971 North Washington, D.C. 20001			6. DELIVERY Immediately upon notification of contract award.		
5B. FOR INFORMATION CALL: (Name and telephone no.) (No collect calls) Lillian J. Beavers, Contract Specialist, Phone (202) 724-2353, fax (202) 727-1679 Lillian.Beavers@dc.gov			7. DELIVERY METHOD <input checked="" type="checkbox"/> FOB DESTINATION <input type="checkbox"/> OTHER (See Schedule)		
8A. TO: NAME AND ADDRESS, INCLUDING ZIP CODE, OF QUOTER ALL CERTIFIED LSDBE OFFERORS			9. DESTINATION FOR DELIVERY OF GOODS OR SERVICES ORDERED Office of the Chief Technology Officer 441 4 th Street, NW, Suite 1045N Washington, DC 20001 Attn: Eleanor Evans		
8B. TAX ID NO. OF QUOTER:					
10. PLEASE FURNISH QUOTATIONS ON OR BEFORE: October 4, 2007, 2:00 PM (BID ROOM ONLY) 441 4 th Street. N.W. Suite 703		11A. PLEASE STATE YOUR LSDBE CERTIFICATION NUMBER BELOW (Attach Copy)			
		11B. IF YOU HAVE A DISTRICT OF COLUMBIA SUPPLY SCHEDULE (DCSS) CONTRACT FOR THESE ITEMS, PLEASE ENTER THE CONTRACT NUMBER BELOW:			
12. INSTRUCTIONS TO QUOTERS AND TERMS AND CONDITIONS					
Instructions to Quoters: Please complete Blocks 8B, 11A, 11(B) if applicable, 13(E), 13(F), 14, 15, 16, 17, 18, as well as submission of technical and price proposals as outlined in this solicitation, submit one (1) original and four (4) copies of signed quotations to Office of Contracting and Procurement, 441 4 th Street, NW, Suite 703 (Bid Room), Washington, D.C. 20001. This is the only authorized method of submitting a quotation for this RFQ. All quotations must be received no later than the date and time stated in block 10 of this RFQ.					
Terms and Conditions: SEE ATTACHED.					
13. SCHEDULE (Include applicable Federal, State and local taxes and all delivery charges)					
ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	See attached Statement of Work				
0001	Base Period – DW Business Analyst/Project Manager	1000	Hours	\$	\$
1001	Option Period One (1) – DW Business Analyst/Project Manager	1000	Hours	\$	\$
2001	Option Period Two (2) – DW Business Analyst/Project Manager	1000	Hours	\$	\$
3001	Option Period Three (3) – DW Business Analyst/Project Manager	1000	Hours	\$	\$
TOTAL AMOUNT					\$
14. NAME AND ADDRESS OF QUOTER (Street, city, county, State and ZIP Code)		15. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION (ELECTRONIC SIGNATURES NOT ACCEPTABLE)		16. DATE OF QUOTATION	
		17. NAME AND TITLE OF SIGNER (Type or print)		18. TELEPHONE NO. (Include area code)	

1. **GENERAL TERMS AND CONDITIONS**

This is a Request For Quotations (RFQ) issued under the small purchase procedures outlined in Title 27, District of Columbia Municipal Regulations, Chapter 18, Section 1802.3. The terms Quote/Quoter and Offer/Offeror are used interchangeably in this RFQ, as are the terms RFQ and solicitation, and the terms submission, quote and proposal, and the terms contract and Purchase Order (PO). Quotations submitted are Offers that the District can accept by issuing a PO. This RFQ is issued in the Set Aside Market for certified LSDBE Offerors. The District will apply preferences in evaluating submissions from District-certified LSDBEs. If you are unable to submit a quote, please so indicate on this form and return it.

- 1.1 The District may award a single contract or multiple contracts resulting from this solicitation to the responsible offeror(s) whose offer(s) conforming to the solicitation will be most advantageous to the District, cost or price, technical and other factors specified elsewhere in this solicitation.
- 1.2 The District may award contracts on the bases 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.

2. **PERIOD OF PERFORMANCE AND CONTRACT TYPE**

The contract awarded from this solicitation will be a labor hour contract. The period of performance for the base period will be 1000 hours from date of award or through December 31, 2007 whichever occurs later, with the option to renew for three (3) additional option periods of 1000 hours each, 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. The quoter/offeror shall submit a price for the base period and each option period. If the District exercises this option, the extended contract shall be considered to include this option provision. The price for the option period shall be as specified in the contract. The total duration of this contract, including the exercise of any options under this clause, shall not exceed twenty-four (24) months.

3. CONTRACTING OFFICER (CO)

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

-Steven H. Wishod, CPPB
Contracting Officer
Government of the District of Columbia
Office of Contracting and Procurement
Information Technology Group
441 Fourth St., NW, Suite 971 North
Washington, DC 20001
Phone: (202) 727-0252 (main)
Phone: (202) 727-8983 (direct)
Fax: (202) 727-1679
E-mail: steven.wishod@dc.gov
Website: ocp.dc.gov

4. AUTHORIZED CHANGES BY THE CONTRACTING OFFICER

The Contracting Officer is the only person authorized to approve changes in any of the requirements of this contract. 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, or a valid changed PO is issued by the Contracting Officer. 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.

5. CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE (COTR)

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 shall be designated upon award of the contract. The COTR shall not have authority to make any changes in the specifications or scope of work or terms and conditions of the contract. 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.

6. ADVISORY AND ASSISTANCE SERVICES

The contract is a “nonpersonal services contract”. It is therefore, understood and agreed that the Contractor and/or the Contractor’s employees: (1) shall perform the services specified herein as independent Contractors, not as employees of the government; (2) shall be responsible for their own management and administration of the work required to bear sole responsibility for complying with any and all technical, schedule, financial requirements or constraints attendant to the performance of this contract; (3) shall be free from supervision or control by any government employee with respect to the manner or method of performance of the service specified; but (4) shall, pursuant to the government’s right and obligation to inspect, accept or reject work, comply with such general direction of the CO, or the duly authorized representative of the CO as is necessary to ensure accomplishment of the contract objectives.

7. DELIVERY OF WORK PRODUCT/INSTRUCTION FROM COTR

- 7.1 The Contractor shall follow the procedures and rules of the Government of the District of Columbia, and additional instructions that the District COTR may direct. During performance under this contract and/or at completion of work, the Contractor shall provide orderly hand-over of work products and deliverables to the District COTR, including all documentation, electronic or otherwise, created during performance of the contract. All work product produced under the contract is at all times the property of the District.
- 7.2 In addition, the Contractor shall:
 - 7.2.1 Ensure that all work is performed on District premises, unless otherwise approved in writing by the COTR;
 - 7.2.2 Unless otherwise specified, Contractor staff shall work onsite at the designated District site during normal business hours.
 - 7.2.3 Provide Windows XP and a PDA that functions with the districts email System for each staff member assigned to this contract.
 - 7.2.4 Provide weekly timesheets, in the formats supplied by the District, reporting all time worked by person’s name, days worked, and time worked. Each person is billable only to a maximum of eight (8) hours per day, 40 hours per week unless written prior approval has been issued by the COTR. Contractor must provide timely, necessary information to allow the District to calculate “earned value”.
 - 7.2.5 Establish and document project goals and optional strategies for their implementation. Support analyses with graphical drawings, charts, and other presentation instruments.
 - 7.2.6 Collect and document project constraints for cost, schedule, and quality. Obtain approval from the Contracting Officer for proposed scope changes.

- 7.2.7 Throughout the performance of the above items, coordinate with District employees and other consultants/Contractors employed by the District.
- 7.2.8 Provide sufficient support after submission of deliverables and work products, as necessary to clarify the contents of deliverables to the District.
- 7.2.9 Develop, obtain approval for, and execute a quality control plan. Provide periodic senior management supervision of the work in this contract in order to provide quality control of the Contractor's work. Report findings to District representative with proposed actions. Provide this service at least every two weeks during the terms of the contract.
- 7.2.10 Continuously monitor the status of Contractor's work hereunder and update status, providing District management timely information regarding possible problems and proposed action required to mitigate such problems.
- 7.2.11 Prepare and present weekly reports, throughout the performance of the Contractor's work, setting out current and upcoming activities, decisions required and issues of concern.
- 7.2.12 Provide reporting and communications in copies and form requested by the designated District representative.

8. HIRING OF EMPLOYEES

By accepting this order or contract, the Contractor agrees that the District, at its discretion, after completion of order or contract period, may hire the individual performing services as a result of this order or contract, without restriction, penalties or fees.

9. INVOICE PAYMENT

The District will make 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. The District will pay the Contractor on or before the 30th day after receiving a proper invoice from the Contractor. The Contractor shall submit proper invoices no later on a monthly basis or as otherwise specified in the order or by the COTR. 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 this solicitation. The address of the CFO is:

Name: OCTO Agency CFO
Accounts Payable Division
Address: 441 4th Street, NW
Suite 930S
Washington, D.C. 20001
Telephone: (202) 727-2277

Fax: 202-727-1216

E-mail: octo.accountspayable@dc.gov

To constitute a proper invoice, the Contractor shall submit the following information:

- (a) Contractor's name and invoice date (Contractors are encouraged to date invoices as close to the date of mailing or transmittal as possible.);
- (b) Contract number and Encumbrance Code (PO Number). Assignment of an invoice number by the Contractor is also recommended;
- (c) Description, price, quantity, dates and the percent (%) of work actually performed;
- (d) The original and two (2) copies of invoices for cost reimbursable expenses, if authorized by the contract;
- (e) Other supporting documentation or information, as required by the Contracting Officer;
- (f) Name, title, telephone number and complete mailing address of the responsible official to whom payment is to be sent;
- (g) Name, title, phone number of person preparing the invoice;
- (h) Name, title, phone number and mailing address of person; and authorized signature.
- (i) Monthly bills must be broken down by rate, person, hours, and task as an attachment to each bill, with approved District timesheets.

10. EVALUATION FACTORS

- 10.1 The District intends, but is not obligated, to make a single award to the responsible Quoter whose quote is most advantageous to the District, based upon the evaluation criteria specified in the solicitation. 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. The Technical Rating Scale is as follows:

<u>Numeric Rating</u>	<u>Adjective</u>	<u>Description</u>
0	Unacceptable	Fails to meet minimum requirements; <i>e.g.</i> , 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.

10.2 MINIMUM REQUIREMENTS (Candidates must meet all minimum requirements to be eligible to be considered for award)

- (a) be a Project Management Professional (PMP) with an up to date certification from the Project Management Institute (PMI)
- (b) have 3-5 years experience in managing and executing project plans, delivering application functionality, technical architectures and documentation within established scope/time frames.
- (c) have 3-5 years experience in evaluating projects and executing needed improvements.
- (d) experience in District and/or Government as an analyst or a project manager similar to the scope described in the statement of work.

- (e) candidate resume must have three references, to include name, title, address, phone number and e-mail address, of reference (business address/phone is acceptable). Resumes containing no references will not be considered for evaluation.

10.3 TECHNICAL CRITERIA (70 points)

10.3.1 KNOWLEDGE AND EXPERIENCE (35 Points)

- (a) experience with Business Intelligence, Enterprise Search and Retrieval, and Geographic Information Systems software applications.
- (b) experience as a team leader for analysts and statisticians with Matrixed support from developers, DBAs, BI and reporting experts in a government organization.
- (c) have experience and/or familiar with some the following technologies, systems and applications: XML, XSLT, Java, C#, JUnit, NUnit, Cruise Control, Subversion, ANT, Microsoft .Net IIS, WebSphere, Tomcat, Oracle, Oracle Spatial, and multi-dimensional data stores, BEA/Plumtree or other portal software, ESRI ArcSDE and ArcIMS GIS, Business Intelligence Software, Data Search engines, SharePoint Portal Server 2003/2007

10.3.2 ANALYTICAL AND TROUBLESHOOTING SKILLS, AND COMMUNICATION SKILLS (10 points; to be evaluated in interview for those Offerors that make the competitive range.)

10.3.3 PAST PERFORMANCE OF CANDIDATE (15 points)

Please provide name, title and current phone number or e-mail address of at least three (3) references that can address each proposed candidates' past performance providing similar services, including an examination of the quality of services provided, timeliness in service delivery, business practices, and overall satisfaction of the candidate's performance.

10.3.4 PAST PERFORMANCE OF OFFEROR (10 points)

Please provide a completed Performance Evaluation Form from at least three (3) references that can address the Offeror's past performance in providing quality candidates for similar services, as well as an examination of the quality of services provided, timeliness in service delivery, business practices, and overall satisfaction of the Offeror's performance. Offerors who have no relevant past performance will receive a neutral score (*i.e.* 5 out of 10).

10.4 PRICE CRITERIA (30 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:

$$\frac{\text{Lowest price proposal}}{\text{Price of proposal being evaluated}} \times 30 = \text{Evaluated price score}$$

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

10.5 PREFERENCE POINTS (12 Points)

10.6 TOTAL (112 Points)

11.0 PREFERENCES FOR LOCAL BUSINESSES, DISADVANTAGED BUSINESSES, RESIDENT-OWNED BUSINESSES, SMALL BUSINESSES, LONGTIME RESIDENT BUSINESSES, OR LOCAL BUSINESSES WITH PRINCIPAL OFFICES LOCATED IN AN ENTERPRISE ZONE

Under the provisions of the "Small, Local, and Disadvantaged Business Enterprise Development and Assistance Act of 2005" (the Act), Title II, Subtitle N, of the "Fiscal Year 2006 Budget Support Act of 2005", D.C. Law 16-33, effective October 20, 2005, as amended, the District shall apply preferences in evaluating bids or proposals from businesses that are small, local, disadvantaged, resident-owned, longtime resident, or local with a principal office located in an enterprise zone of the District of Columbia.

11.1 GENERAL PREFERENCES

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

- 11.1.1 The addition of three points on a 100 point scale for a small business enterprise (SBE) certified by the Small and Local Business Opportunity Commission (SLBOC) or the Department of Small and Local Business Development (DSLBD), as applicable;
- 11.1.2 The addition of five points on a 100 point scale for a resident-owned business enterprise (ROB) certified by the SLBOC or the DSLBD, as applicable;
- 11.1.3 The addition of ten points on a 100 point scale for a longtime resident business (LRB) certified by the SLBOC or the DSLBD, as applicable;

11.1.4 The addition of two points on a 100-point scale for a local business enterprise (LBE) certified by the SLBOC or the DSLBD, as applicable;

11.1.5 The addition of two points on a 100-point scale for a local business enterprise with its principal office located in an enterprise zone (DZE) and certified by the SLBOC or the DSLBD, as applicable; and

11.1.6 The addition of two points on a 100-point scale for a disadvantaged business enterprise (DBE) certified by the SLBOC or the DSLBD, as applicable.

11.2 MAXIMUM PREFERENCE AWARDED

Notwithstanding the availability of the preceding preferences, the maximum total preference to which a certified business enterprise is entitled under the Act for this procurement is twelve (12) points on a 100 point scale for submissions in response to this RFQ.

11.3 PREFERENCES FOR CERTIFIED JOINT VENTURES

When the SLBOC or the DSLBD, as applicable, certifies a joint venture, the certified joint venture will receive preferences as a prime Contractor for categories in which the joint venture and the certified joint venture partner are certified, subject to the maximum preference limitation set forth in the preceding paragraph.

11.4 VENDOR SUBMISSION FOR PREFERENCES

11.4.1 Any vendor seeking to receive preferences on this solicitation must submit at the time of, and as part of its bid or proposal, the following documentation, as applicable to the preference being sought:

11.4.1.1 Evidence of the vendor's or joint venture's certification by the SLBOC as an SBE, LBE, DBE, DZE, LRB, or RBO, to include a copy of all relevant letters of certification from the SLBOC; or

11.4.1.2 Evidence of the vendor's or joint venture's provisional certification by the DSLBD as an SBE, LBE, DBE, DZE, LRB, or RBO, to include a copy of the provisional certification from the DSLBD.

11.4.2 Any vendor seeking certification or provisional certification in order to receive preferences under this solicitation should contact the:

Department of Small and Local Business Development
ATTN: LSDBE Certification Program
441 Fourth Street, N.W., Suite 970N
Washington, DC 20001

11.4.3 All vendors are encouraged to contact the DSLBD at (202) 727-3900 if additional information is required on certification procedures and requirements.

12. ATTACHMENTS

Statement of Work (Attachment A)
Tax Certification Affidavit (Attachment B)
Sample Resume' (Attachment C)
Contractor Past Performance Evaluation (Attachment D)

13. INSTRUCTIONS

- 13.1 Please submit one (1) original and four (4) copies of both the signed technical and price quotations in separately sealed envelopes (one technical and price) to the Office of Contracting and Procurement, 441 4th Street, NW, Suite 703 (Bid Room), Washington, D.C. 20001.** All quotes must be received no later than the date and time stated in block 10 of the RFQ form. Technical proposals should include candidate resumes as well as company capability statements and all other information that the District would need for its evaluation. **ONLY THE ORIGINAL RESUME(S) shall contain the candidate name. All other resumes shall be in accordance with the ATTACHED SAMPLE RESUME. THIS IS THE ONLY AUTHORIZED METHOD OF SUBMITTING A QUOTE FOR THIS RFQ.**
- 13.2 Issuance of this RFQ does not commit the District to pay any costs incurred in the preparation of the submission of this quotation.
- 13.3 By submitting a quote, Quoter is representing that the candidates proposed are available to commence work promptly upon the Quoter's receipt of a PO provided that a PO is received within twenty one (21) days of submission in response to this RFQ. By submitting a Quote, Quoter further represents that it understands that award decisions will be made based, in part, on the quality of the candidate proposed, and that if the candidate should not be available to commence work, for whatever reason, at the beginning of the period of performance, the District reserved the right to cancel the award and proceed with awarding to another Quoter whose candidate is available.
- 13.4 The Standard Contract Provisions for Use with District of Columbia Government Supplies and Services Contracts, March 2007, are hereby incorporated by reference and made a part of this RFQ and the resultant PO. For a copy, go to OCP's website, <http://ocp.dc.gov>, and click on Solicitation Attachments.
- 13.5 ALL RESUMES COPIES FORWARDED MUST HAVE THE CANDIDATES NAME REMOVED AND NO REFERENCE TO YOUR COMPANY OR COMPANY LOGOS. PLEASE FORWARD RESUMES AS CANDIDATE 1, CANDIDATE 2 OR CANDIDATE 3 ETC. PLEASE PROVIDE A REFERENCE SHEET IDENTIFYING THE CANDIDATES TO THE CORRESPONDING RESUME (SEE ATTACHMENT C "SAMPLE RESUME")**

END

Attachment A

Office of the Chief Technology Officer Government of the District of Columbia

Citywide Data Warehouse Business Analyst/Project Manager

STATEMENT OF WORK

1 Background

- 1.1 The Citywide Data Warehouse program is a key mechanism to improve governance and operational efficiency of the DC government. The program was established to:
 - 1.1.1 Identify and gather datasets from agencies to realize significant benefits from data sharing across the District;
 - 1.1.2 Accelerate interagency sharing of datasets; and
 - 1.1.3 Provide access to datasets to non-DC government entities (citizens, other governments, private sector) to the extent that data sharing is not constrained by privacy or security considerations.
- 1.2 The Citywide Data Warehouse program supports applications, databases and infrastructure that support the functional and data requirements established by the Office of the City Administrator and Mayor Fenty's CapStat initiative.
- 1.3 The Citywide Data Warehouse applies modern object oriented analysis and design techniques development. Agile Modeling and Extreme Programming principles are adapted into practices specific to the OCTO environment. System models and design diagrams are prepared using UML notation. Development techniques, including: adaptive design, frequent iterations, test-driven coding and code review drive productivity and quality of software development efforts.

2. Scope of Work

- 2.1.1 Contractor shall provide a **Business Analyst/Project Manager** to provide the District with expert consulting services required for efficient management of IT services. Contractor candidate shall support existing OCTO requirements that tie into the databases and infrastructure as well as oversee code and documentation for new development tasks according to the specified timeframes and the required quality levels. Candidate selected shall perform as follows:
- 2.1.2 Work in coordination with the Program Manager, and Development, Technical Infrastructure and Data Content team leads to achieve project objectives.
- 2.1.3 Work in coordination with other agencies throughout the District to identify relevant datasets, understand business processes, evaluate data and provide analysis to support OCTO programs as needed.
- 2.1.4 Understand project scope/timeframes and, under direction of the Program Director, construct a corresponding project plan with activities, schedules, milestones, deliverables and resources across teams.
- 2.1.5 Establish and document project goals and optional strategies for their implementation. Support analyses with graphical drawings, charts, and other presentation instruments.

- 2.1.6 Collect and document project constraints for cost, schedule, and quality. Obtain approval from the District representative for proposed scope changes.
- 2.1.7 Provide reporting and communications in copies and forms requested by OCTO. All deliverables shall be available in both hard copy and electronic format.
- 2.1.8 Throughout the performance of the above items, coordinate with District employees and other consultants/contractors employed by the District.
- 2.1.9 Prepare and present weekly reports, throughout the performance of contractor's work, setting out current and upcoming activities, decisions required and issues of concern.

3. Deliverables

The general objective of this Statement of Work is to provide the District with a Data Warehouse Business Analyst/Project Manager to augment OCTO staff. Deliverables for this project shall vary across the term of this agreement and will be mutually agreed upon by the Contractor and the COTR. All deliverables must be completed to the satisfaction of the District COTR.

- 3.1 Contractor shall provide limited support after submission of deliverables and work products, as necessary to clarify the contents of deliverables to District staff and other contractors to the District.
- 3.2.1 Contractor shall continuously communicate status of the work relative to the approved schedule. Prepare and present weekly reports, throughout the performance of the contractor's work, setting out current and upcoming activities, decisions required and issues of concern. Timely, complete, and satisfactory provision by the contractor to the District of such reports shall be a condition precedent to payment of the contractor.

4. Documents: Printed plus Electronic copies Mandatory

- 4.1.1 Documents required from contractor require, five (5) printed copies of written documents or other evidence of deliverables shall be provided to OCTO using standard Microsoft Office Suite applications (or other OCTO-established project management standards tools), unless otherwise agreed to. The deliverable shall also be accompanied by an electronic copy (on disk or CD or via email) of the document.
- 4.1.2 Documents prepared in PowerPoint or other graphical presentation, the deliverable shall include the required formats (printed + electronic copy of originals file) PLUS an additional electronic file which has been converted to a format suitable for electronic distribution (example PDF format).

Copies shall be filed both with the OCTO Program Manager for incorporation into the overall program files and with the Contracts Management Officer as required for delivery verification.

5.2 Record retention:

- 5.2.1 Electronic and paper documents, forms, survey instruments, background materials secured as part of this contract shall be considered the property of the District of Columbia.
- 5.2.2 Contractor shall periodically review these resource materials with the COTR and establish file and retention plans.
- 5.2.3 No later than fourteen (14) days before the close-out of the contract, the contractor shall review with the COTR all project-related materials and agree on a disposition plan for the contract closeout.

6. Contractor Staffing and Management

Senior Management Supervisor: Contractor shall assign a senior manager as the Contractor's chief representative for this contract. This representative shall have the authority to make binding decisions for the organization. This representative will be in charge of all members of the Contractor team assigned to the project and will be the main contact. All correspondence, conferences, meetings and questions concerning the project directed to the Contractor and its subcontractors will be through this person. This representative will be personally available at all times during working hours from the beginning of the work through its completion.

Travel: The Contractor may incur reimbursable local travel expenses under this contract that are pre-approved. Specific prior authorization may be approved for out-of-town travel associated with approved project activities.

7. **Change in Personnel:** Contractor shall notify the District no less than 30 days in advance of any proposed change in personnel associated with this contract.

The District may direct the Contractor to remove any Contractor staff that the District finds unacceptable, and the Contractor shall immediately remove (and replace with new individual satisfactory to the District, if requested) such personnel.

The District reserves the right to interview, approve and/or disapprove of any proposed replacement candidates.

8. **Qualifications :** Contractor shall provide resumes of no more than **two (2) resumes** for candidates for this position.
9. **Contractor Team and Project Management:** Unless otherwise provided by the District through the OCTO program and related project management structure, the contractor shall provide project management, administrative management and administrative support necessary for the work hereunder. This support shall be provided at no cost to the District, unless the District specifically pre-approves assignment of personnel dedicated to such tasks.

10. District Responsibilities

The District of Columbia will provide the contractor staff with a working area, desk, network access and basic supplies to commensurate with the personnel resource.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER
OFFICE OF TAX AND REVENUE



TAX CERTIFICATION AFFIDAVIT

THIS AFFIDAVIT IS TO BE COMPLETED ONLY BY THOSE WHO ARE REGISTERED TO CONDUCT BUSINESS IN THE DISTRICT OF COLUMBIA.

Date: _____

Name of Organization/Entity: _____

Address: _____

Business Telephone No.: _____

Principal Officer:

Name: _____ Title: _____

Soc. Sec. No.: _____

Federal Identification No.: _____

Contract No.: _____

Unemployment Insurance Account No.: _____

I hereby certify that:

1. I have complied with the applicable tax filing and licensing requirements of the District of Columbia.
2. The following information is true and correct concerning tax compliance for the following taxes for the past five (5) years:

	Current	Not Current	Not Applicable
District: Sales and Use	()	()	()
Employment Withholding	()	()	()
Ball Park Fee	()	()	()
Corporation Franchise	()	()	()
Unincorporated Franchise	()	()	()
Personal Property	()	()	()
Real Property	()	()	()
Individual Income	()	()	()

The Office of Tax and Revenue is hereby authorized to verify the above information with the appropriate government authorities. The penalty for making false statements is a fine not to exceed \$5,000.00, imprisonment for not more than 180 days, or both, as prescribed by D.C. Official Code § 47-4106.

This affidavit must be notarized and becomes void if not submitted within 90 days of the date notarized.

Signature of Authorizing Agent

Title

Print Name

Notary: DISTRICT OF COLUMBIA, ss:

Subscribed and sworn before me this _____ day of _____ Month and Year

Notary Public: _____

My Commission Expires: _____

Attachment C Sample Resume'

Candidate 1

EDUCATION

MIDWAY SCHOOL OF BUSINESS - Chicago, IL
Master of Business Administration - Finance and Strategic Management - June 2001

- Dean's Honor List
- Active member of Management Consulting, Corporate Management and Strategy, and High Tech Clubs.

ANDERSEN COLLEGE - Boston, MA
Bachelor of Arts in Physics (Cum Laude) - June 1996

- Andersen College Scholarship for academic distinction; Dean's List all semesters
- Violinist in Andersen College Sym phony
- Physics tutor for Bureau of Study Counsel; active participant in Habitat for Humanity
- Completed dissertation in the field of condensed matter theory

EXPERIENCE

SMART BROTHERS - New York, NY
Technology Project Manager - Investment Banking - June 1997 - July 1999

- Managed project teams to develop profit and loss systems for Proprietary Trading group
- Promoted to project leadership role in two years, well ahead of department average of four
- Developed an original mathematical algorithm for trading processing module, improving performance by 1200%
- Led team of six analysts in firmwide project to reengineer loan syndicate trading flows in firm's largest technology project of 1999. Recommendations established new firmwide standard for real-time trade processing
- Appointed lead developer of interest accrual team after just three months in department. Initiated and designed project to create customized, improved interest accrual and P&L applications for fixed income controllers
- Selected to work on high-profile project to reengineer corporate bond trading P&L system. Reduced overnight processing time from six hours to 20 minutes and improved desktop application speed by 350%
- Devoted 20-25 hours a month to instructing junior members of the team in interest accrual and trading

FINANCIAL TECHNOLOGY GROUP - New York, NY
Analyst - June 1996 - May 1997

- Developed cutting-edge analytic software for use by Wall Street traders
- Worked on a daily basis with clients to create and implement customized strategic software solution for equity traders. Helped create and deliver extensive training program for clients
- Initiated, created, and documented new firmwide standard for software module development

References (Three): (Shall be provided to be considered.)

27. Contracting Officer Review ?	a. Name:	b. Signature:	c. Date	d. Comments:
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DISTRIBUTION [FOR OCP USE ONLY]:

- | | | |
|--|---|---|
| <input type="checkbox"/> a. Procurement File | <input type="checkbox"/> e. Contract Administrator/COTR | <input type="checkbox"/> i. Agency Chief Financial Officer |
| <input type="checkbox"/> b. Agency Chief Contracting Officer | <input type="checkbox"/> f. Contract Monitor | <input type="checkbox"/> j. D.C. Office of Inspector General |
| <input type="checkbox"/> c. Chief Procurement Officer (CPO) | <input type="checkbox"/> g. Agency Director | <input type="checkbox"/> k. D.C. Office of Local Business Development |
| <input type="checkbox"/> d. OCP Headquarters (Quality Assurance) | <input type="checkbox"/> h. Agency Program | <input type="checkbox"/> l. OTHER: _____ |

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OCP Form 4001 (Front)

(Rev. 3/2000)

INSTRUCTIONS

GENERAL INSTRUCTIONS:

- This form shall be generated to rate the performance of any contractor, provider, or supplier of goods and services to the District of Columbia.
- The performance shall be summarized in the comments blocks included on the front of this form by checking the appropriate rating block, and adding any additional comments. If there is not enough space to provide additional comments, please provide the comments on a separate sheet and attach that sheet to the form.
- Please complete and transmit the attached form to your Agency Chief Contracting Officer in the Office of Contracting and Procurement (OCP), no less than three (3) weeks from the date that a contract ends; or the final delivery and receipt of goods and services pursuant to a contract; or upon the specific request of a representative of the Office of Contracting and Procurement.
- Please evaluate the performance of the contractor in each area requested checking the appropriate block on the performance evaluation form in accordance with the Rating Schedule listed below:

RATING SCHEDULE

- | | | |
|-----|-----------------------|---|
| (0) | UNSATISFACTORY | The performance was substandard, and does not meet most contractual requirements. The contractual performance contained serious compliance problems for which the contractor's corrective actions appear or were ineffective. |
| (1) | POOR | The performance was simply marginal, and just barely met the contractual requirements. There are, or were, deficiencies in the overall performance that the contractor needs to address. Generally, there were several concerns with the contractor's performance, quality and service. |
| (2) | SATISFACTORY | The performance acceptably meets or met the contractual requirements. The performance was timely, in compliance with the contractual requirements. Generally, there were a few minor difficulties or problems for which corrective action were undertaken by the contractor and were successful. |
| (3) | GOOD | The performance on this contract was more than satisfactory and exceeded some of the contractual requirements. The performance was more than timely and the quality of service above compliance with the requirement. Generally, there was good satisfaction and happiness with the contractor performance, quality, and service. |
| (4) | VERY GOOD | The performance met and exceeded most of the contractual requirements, to the benefit of the government, resulting in a high standard of quality, timeliness, and overall customer satisfaction.. There were minimal difficulties with this contract for which all corrective actions undertaken by the contractor were met and fully implemented by the contractor. |
| (5) | OUTSTANDING | The performance of the contractor <i>ALWAYS</i> exceeds the contractual requirements, and was reflected by a continued pattern of an exceptional quality goods (or service, or work product); a continued pattern of advance delivery of goods or completion of services; a continued pattern of always performing at or below budget costs; and an unusual pattern of responsiveness to customer concerns; and an exceptionally high standard of demonstrated technical excellence. There were no contractor difficulties with this contract for which corrective action was required. |
6. A written, detailed narrative **SHALL** be provided to support and sustain all ratings of **UNSATISFACTORY** or **OUTSTANDING**. Please attach additional sheets, if needed.

SPECIFIC INSTRUCTIONS: (All items **MUST** be completed):

- | | |
|-----------|--|
| Block 1. | Insert the assigned, official contract number of the contract. |
| Block 2. | Enter the name, address, telephone and facsimile numbers, and the name of the point of contact of the contractor. |
| Block 3. | Enter the name, address, and telephone, facsimile and e-mail numbers of the Contract Administrator (CA) / Contracting Officer Technical Representative (COTR). |
| Block 4. | Enter the appropriate classification information on the contract, or purchase order. Check all that apply. |
| Block 5. | Enter the contract date of award. |
| Block 6. | Enter the contractor's federal tax identification number that is listed in or on the contract document. |
| Block 7. | Enter a brief statement proving a caption or description of the nature of the contract. |
| Block 8. | Enter the name, address, and telephone and fax numbers of the Contract Monitor, or person completing this evaluation, if other than the CA/COTR. |
| Block 9. | Enter the initial, or agreed upon, price of the contract as listed in the contract or purchase order, <u>exclusive</u> of all modifications. |
| Block 10. | Enter the final cost of the contract, or what has been, or will be paid to the contractor, <u>inclusive</u> of all approved cost modifications. |
| Block 11. | Enter the actual stated contract period of the contract that is listed on the front of the contract document. |
| Block 12. | Enter the specific period for which the performance evaluation is being completed if the specific period is less the total period of the contract. |

- Block 13. This item is intended to determine whether the contractor met, or is meeting, the specific requirements outlines in the scope of work that is listed in the contract.
- Block 14. This item is intended to determine the quality of the contractor goods, service, or work performance.
- Block 15. This item is intended to obtain an indication of the timeliness of performance. Ask the question: Did the contractor deliver or perform on time?
- Block 16. This item is intended to assess whether the customer believes the contractor is reliable enough to be used again by the District.
- Block 17. This item is intended evaluate how well the contractor interacted with the District. Was the contractor responsive, flexible, cooperative, and professional.
- Block 18. This item is intended to assess the contractor' s consistency in submitting the complete documents for payment, and other administrative documents Including compliance on obtaining adequate liability insurance coverage where that requirement is applicable.
- Block 19. This item is intended to ascertain whether the vendor demonstrated originality and resourcefulness in handling issues addressed in a more traditional manner.
- Block 20. This item is intended to evaluate the contractor complied with the stated, or negotiated, contract cost.
- Block 21. This item addresses the extent, effectiveness, and overall management capability of the contractor. *(Primarily in service, consulting and construction contracts.)*
- Block 22. This item addresses the extent to which the contractor met compliance requirements for a safe work site. *(Primarily applicable in construction contracts).*
- Block 23. This item addresses the extent to which the contractor met compliance requirements for labor standards and laws.
- Block 24. This item is intended to evaluate whether the facilities that are provided by the contractor to the District met requirements, including whether the facilities were clean, and safe; and met all District housing and building code requirements, or had a Certificate of Occupancy, where applicable.
- Block 25. Provide an OVERALL PERFORMANCE RATING assessing on the contractor' s performance. The rating must be consistent with the prior ratings.
- Block 26. The Evaluator completing this performance evaluation shall sign and enter the date of signature.
- Block 27. The Contracting Officer shall review, and shall sign and enter the date of signature.

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(Rev. 3/2000)