

REQUEST FOR QUOTATIONS (RFQ) (THIS IS NOT AN ORDER)				PAGE	OF PAGES
				1	12
1. RFQ NO. RFQ364645	2. DATE ISSUED September 13, 2007	3. REQUISITION NO. RQ364645	4. TYPE OF MARKET _x_ Open ___ Set Aside ___ 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) Melford Brown, Contract Specialist, Phone (202) 727-0229, fax (202) 727-1679 melford.brown@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			9. DESTINATION FOR DELIVERY OF GOODS OR SERVICES ORDERED OFFICE OF CHIEF TECHNOLOGY OFFICER 441 4 th Street, N.W. Suite 1045N Washington, DC 20001 Barney Krucoff		
8B. TAX ID NO. OF QUOTER:					
10. PLEASE FURNISH QUOTATIONS ON OR BEFORE: September 27, 2007, 2:00PM		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					
<u>Instructions to Quoters:</u> 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 (3) copies of signed quotations to Office of Contracting and Procurement, 441 4th 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. 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 Purchase Order(Po). For a copy, go to OCP' s website, http://ocp.dc.gov, and click on OCP HOME then Solicitation Attachments.					
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)
001	GIS Systems Lead – Base Period	1,960	L/H		\$
002	Allowable, Allocable and Reasonable Expenses				\$5,000.00
001	GIS Systems Lead – Option Period 1	1,960	L/H		\$
002	Allowable, Allocable and Reasonable Expenses				\$5,000.00
001	GIS Systems Lead –Option Period 2	1,960	L/H		\$
002	Allowable, Allocable and Reasonable Expenses				\$5,000.00
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.

1.a **Contract Award**

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.b **Initial Offers**

The District may award contracts on the basis of initial offers received, without discussion. Therefore, each offer should contain the offeror's best terms from the standpoint of cost, 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 1,960 hours from date of award or through December 31, 2007 whichever occurs later, with the option to renew for Two (2) additional option periods of 1,960 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 thirty one (37) 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:

William E. Sharp
Contracting Officer
Office of Contracting and Procurement
441 Fourth St., NW, Suite 971 North
Washington, DC 20001

Phone: (202) 727-0252
Fax: (202) 727-1679
E-mail: sharp.william@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.

The COTR for this project is:

Mr. Barney Krucoff
441 4th Street, NW, Suite 930
Washington, DC 20001
Telephone Number: (202) 727-6490

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 and 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 Provide to personnel performing work under this contract high-end laptops with Window XP Professional and necessary communication equipment. Contractor shall also provide space, equipment, storage, personnel, and systems in the Contractor's offices as necessary to support the work hereunder. Unless otherwise specified, Contractor staff shall work onsite at the designated District site during normal business hours;
- 7.2.3 The Contractor shall 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 OTR. Contractor must provide timely, necessary information to allow the District to calculate "earned value";
- 7.2.4 Establish and document project goals and optional strategies for their implementation. Support analyses with graphical drawings, charts, and other presentation instruments;
- 7.2.5 Collect and document project constraints for cost, schedule, and quality and Obtain approval from the Contracting Officer for proposed scope changes;
- 7.2.6 Coordinate with District employees and other consultants/Contractors employed by the District throughout the performance of the above items;
- 7.2.7 Provide sufficient support after submission of deliverables and work products, as necessary to clarify the contents of deliverables to the District;
- 7.2.8 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 the District representative with proposed actions. Provide this service at least every two weeks during the terms of the contract;
- 7.2.9 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;

- 7.2.10 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 and
- 7.2.11 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 than 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:

OCTO Agency CFO
Accounts Payable Division
441 4th Street, NW
Suite 930S
Washington, D.C. 20001
(202) 727-2277
Fax: (202)-727-1216

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 recommended;

- (c) Description, unit, 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 and
- (i) Monthly bills must be broken down by rate, person, hours, and task as an attachment to each bill and supported 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:

10.2

<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.
	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)

Minimum Education Required: Bachelors and Master's degrees in relevant fields such as computer science, geography, or planning.

Years of Experience Required: 5 Years of relevant professional experience.

Resumes: Offerors shall submit no more than two (2) resumes. Submit two resumes for each candidate (one with the name of candidate and without the name). The resumes shall contain three (3) references. Missing references shall result in resumes not being evaluated.

10.3 TECHNICAL CRITERIA (70 points)

10.3.1 KNOWLEDGE AND EXPERIENCE (35 Points)

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 and 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 completed Past Performance Evaluations (Attachment A) 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

Past Performance of Offeror (Attachment A)
Sample Resume (Attachment B)
Tax Certification (Attachment C)

13. INSTRUCTIONS

13.1 Please submit one (1) original and three (3) copies of the signed technical and signed price quotations in separately sealed envelopes to the Office of Contracting and Procurement, 441 4th Street, NW, Suite 703 (Bid Room),

Washington, D.C. 20001. THIS IS THE ONLY AUTHORIZED METHOD OF SUBMITTING A QUOTE FOR THIS RFQ. 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.

- 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>, click OCP HOME, and then click on Solicitation Attachments.
- 13.5 **ALL RESUMES FORWARDED MUST HAVE THE CANDIDATES NAME REMOVED AN NO REFERENCE TO YOUR COMPANY. PLEASE FORWARD RESUMES AS CANDIDATE 1, CANDIDATE 2. PLEASE PROVIDE A REFERENCE SHEET IDENTIFYING THE CANDIDATES TO THE CORRESPONDING RESUME**

STATEMENT OF WORK

GIS Systems Infrastructure Lead Technical Support Services

Office of the Chief Technology Officer

District of Columbia Government

1.0 BACKGROUND

The Office of the Chief Technology Officer (OCTO) was established to execute the legislative mandate to centralize responsibility for the District government's investments in information technology and telecommunications systems and to help District departments and agencies provide services more efficiently and effectively. OCTO develops and enforces policy directives and standards regarding information technology and telecommunications systems throughout the District government. OCTO also develops key central technologies that support all agencies, and serves as a source of expertise for District departments and agencies seeking to use information technology and telecommunications systems to improve services.

1.1 Purpose

The purpose of this Statement of Work is to procure a consultant to provide project technical support and leadership of work related to the development and maintenance of OCTO's GIS systems infrastructure.

2.0 PROJECT ACTIVITIES

The work effort associated with this position would include but not be confined to:

1. Support and management of current GIS computer systems.
2. Evaluate new software purchases against standards
3. Establish system access and security
4. Provide technical support to users
5. Install and test new equipment/upgrades
6. Conduct software maintenance including installing the latest releases and tuning of supported software (ESRI (ArcGIS, ArcIMS, ArcSDE), Microsoft, VMware, Oracle, Citrix, and etc) and software patches.
7. Provide a DC GIS development environment so that new software and applications can be tested prior to their deployment on the production environment at the Share Computer Center.
8. Review and testing of applications related to GIS systems.
9. Lead implementation of the next phase of the Central GIS system.

3.0 SUPERVISORY CONTROLS

Client works under the general supervision of the client typically prepares analyses and recommendations that the supervisor considers in determining the overall approach to be taken.

4.0 REQUIREMENTS

The contractor is requested to provide a proposal that describes their expertise and approach to supporting the technical activities in the OCTO GIS group. The proposal should provide their methodology for meeting the objectives of this scope of work, assumptions, and proposed staff.

The position requires the following knowledge and experience:

Extensive experience working in or with state and local governments.

Thorough knowledge of geodatabases, computer systems, and computer networks.

Previous Systems Administration Experience with

ArcGIS Desktop
ArcGIS Server
ArcSDE
Citrix
Pictometry EFS

Previous Windows System Administration Experience with:

Window Server 2003
VMware 2.5-3.0

Experience in multiple areas of information science such as computer systems analysis, application project management, computer operations and computer hardware/software technology assessment.

5.0 DELIVERABLE REQUIREMENTS

Deliverables will be assigned throughout the project with timelines.

- Where documents are required from contractor, 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). The deliverable document shall be accompanied by an electronic copy (on disk or CD or via email) of the document.
- If documents are 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 COTR for delivery verification.

5.1 Record retention:

- 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.
- Contractor shall periodically review these resource materials with the COTR to establish file and retention plans.
- No later than fourteen (14) days before the close-out of the contract, the contractor shall review with the COTR all project-related materials to prepare a disposition plan for the contract closeout.

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: _____ |

Computer Generated

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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OCP Form 4001 (Back)

(Rev. 3/2000)

Attachment B 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.)

TAX CERTIFICATION AFFIDAVIT

Date _____, 2007

Name of Organization/Entity: _____

Address: _____

Principal Officers:	Name	Soc. Sec. No.	Title
_____	_____	_____	_____
_____	_____	_____	_____

Business Telephone No.: _____

Finance and Revenue Registration No.: _____

Federal Identification No.: _____

DUNS 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:

District:		Current	Not Current
Sales and Use		()	()
Employment Withholding		()	()
Hotel Occupancy		()	()
Corporation Franchise		()	()
Unincorporated Franchise		()	()
Personal Property		()	()
Professional License		()	()
Arena/Public Safety Fee		()	()
Vendor Fee		()	()

3. If not current, as checked in item 2, I am in compliance with a payment agreement with the Department of Finance and Revenue.
 Yes No

Attach copy of the Agreement.

If outstanding liabilities exists and no agreement has been made, please attach a listing of all such liabilities.

The Department of Finance and Revenue also requires:

(A) Copies of FR-532 (Notice of Registration) or a copy of an FR-500 (Combined Registration Form)

(B) Copies of canceled checks for the last tax period(s) filed for each tax liability; i.e., sales and use, employer withholding, etc.

The District of Columbia Government is hereby authorized to verify the above information with appropriate Government authorities. Penalty for making false statements is a fine of not more than \$1,000.00, imprisonment for not more than one year, or both, as prescribed in D.C. Code Sec. 22-2514. Penalty for false swearing is a fine of not more than \$2,500.00, imprisonment for not more than three (3) years, or both, as prescribed in D.C. Code sec. 22-2513.

Signature of Person Authorized to Sign This Document

Title

Print Name

Notary: DISTRICT OF COLUMBIA, ss:

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

Notary Public

My Commission Expires _____