



Effective Date: 12/10/15

Subject: Request for Proposal (RFP) DCRB-16-003 for  
Pension Oversight Project Management and Quality Assurance Services  
Amendment No.: 001

---

DESCRIPTION OF AMENDMENT 001:

Request for Proposal for the Pension Oversight Project Management and Quality Assurance Services is amended as described herein.

Page 1:

- Added Solicitation, Offeror, Award Page:



<b>SOLICITATION, OFFER, AND AWARD</b>		1. Caption		Page of Pages	
		Oversight Project Management & Quality Assurance		1	49
2. Contract Number	3. Solicitation Number	4. Type of Solicitation	5. Date Issued	6. Type of Market	
	DCRB-16-003	<input type="checkbox"/> Sealed Bid (IFB) <input checked="" type="checkbox"/> Sealed Proposals (RFP) <input type="checkbox"/> Sole Source <input type="checkbox"/> Human Care Agreements <input type="checkbox"/> Emergency	12/8/2015	<input checked="" type="checkbox"/> Open <input type="checkbox"/> Set Aside (CBE Market) <input type="checkbox"/> Open with Sub-Contracting Set Aside <input type="checkbox"/> Other than Full and Open Competition <input type="checkbox"/> Limited Competition	
7. Issued By: District of Columbia Retirement Board Procurement 900 7th Street, NW, 2nd Floor Washington, DC 20001			8. Address Offer to: District of Columbia Retirement Board Procurement 900 7th Street, NW, 2nd Floor Washington, DC 20001		

**SOLICITATION**

9. Sealed offers in original and 1 copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, if hand carried to the bid counter located at Above Address or if electronically, send to place specified in Item 10. C until 5pm local time 8-Jan-16 (Date)

CAUTION: Late Submissions, Modifications and Withdrawals: See Solicitation. All offers are subject to all terms & conditions contained in this solicitation.

10. For Information Contact	A. Name		B. Telephone		C. E-mail Address
	Neda Bolourian		(Area Code) 202	(Number) 343-3200 (Ext)	dcrb.procurement@dc.gov

11. Table of Contents							
(X)	Section	Description	Page No.	(X)	Section	Description	Page No.
		Article I. DCRB Objectives and Requirements	2	X	H	Primary Consultant/Contractor/Offeror	20
X	A	Overview	2	X	I	Assignment	20
X	B	Statement of Objectives	2	X	J	Restriction on disclosure and use of data	20
X	C	General Requirements	4	X	K	Notices	21
x	D	Deliverables	6	X	L	Contract Term	21
X	E	Schedule of Events	7	X	M	Termination for Cause or Convenience	22
X	F	Point of Contact	7	X	N	Rights in Data	22
X	G	Questions and RFP Amendments	7	X	O	Successor Contract	25
X	H	Submission of Proposal	8	X	P	Security and Background Checks	25
X	I	Evaluation of Proposals	15	X	Q	Dispute Resolution	26
				X	R	Governing Laws	26
		Article II. General Terms and Conditions	18	X	S	Freedom of Information Act	26
X	A	Reservations	18	X	T	Insurance Requirements	27
X	B	Confidentiality	18	X	U	Order of Precedence	29
X	C	Indemnification	19				
X	D	Sole Property	19	X		Appendix A - Board Lock-Out Rule	30
X	E	Contractual Requirements	19	X		Appendix B - Procurement and Conflict of Interest Rules	31
X	F	Complete Contract	19	X		Appendix C - DCRB's PII Policy	34
X	G	Prohibition Against Contingent Fees	20	X		Appendix D - DCRB's Information Security Policy	40
				X		Appendix E - DCRB's Confidentiality Agreement	48

**OFFER**

12. In compliance with the above, the undersigned agrees, if this offer is accepted within 120 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
	1	12/10/2015		

15A. Name and Address of Offeror	16. Name and Title of Person Authorized to Sign Offer/Contract		
15B. Telephone (Area Code) (Number) (Ext)	15 C. Check if remittance address is different from above - Refer to Section G	17. Signature	18. Offer Date

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

19. Accepted as to Items Numbered	20. Amount	21. Accounting and Appropriation
22. Name of Contracting Officer (Type or Print) Eric Stanchfield, Executive Director	23. Signature of Contracting Officer (District of Columbia)	24. Award Date



Page 4:

- Replaced B.6 Quality Assurance Surveillance Plan (QASP) with:  
 “B.6 Weekly Status Report – Deliverable. The contractor shall work with DCRB on a weekly status report with the format to be determined by DCRB.”
- Added  
 “B.7 Quality Assurance Surveillance Plan (QASP). DCRB may use a Quality Assurance Surveillance Plan (QASP) to monitor the quality of the contractor’s performance. The oversight provided for in the contract and in the QASP will help to ensure that service levels reach and maintain the required levels throughout the contract term. Further, the QASP provides the COR with a proactive way to deter unacceptable or deficient performance and provides verifiable input for the required Past Performance Information Assessments. A draft QASP shall accompany any proposal submitted in response to this SOO. The QASP will be finalized immediately following award and a copy provided to the Contractor after award. The QASP is a living document and may be updated by DCRB as necessary.”

Page 6:

- Replaced the D. Deliverables table with the following updated table:

<b>Deliverable Due Date</b>	<b>Deliverable</b>	<b>Description of Deliverable</b>	<b>DCRB’s Acceptance Criteria</b>	<b>Submittal Requirements/ Format</b>
Within 5 business days of Award	Post Award Meeting	Contractor shall contact the COR to arrange a meeting to initiate action and confirm requirements.	The Contractor shall meet with the COR and other staff to discuss requirements.	Phone/In-person, Web-ex  Format: Discussion
Monthly	Monthly Progress Report	The Contractor is required to prepare and submit monthly progress reports.	The Contractor shall meet with the COR and other staff to discuss the content and format of the report.	Email COR Format: Word doc.
Weekly	Weekly Status Report	The Contractor is required to prepare and submit weekly status reports.	The Contractor shall meet with the COR and other staff to discuss the contents of the report.	Email COR Format: Word doc.
One-time, 90 days prior to contract expiration	Transition Plan	The Contractor shall provide a transition plan to include phase-in and phase-out services.	The Contractor shall meet with the COR and other staff to discuss the contents of the plan.	Email COR Format: Word doc.



Page 7:

- Corrected Schedule of Events table, Proposal Due Date should be January 8, 2016:

<b>Activity</b>	<b>Scheduled Date</b>
Request for Proposal	December 8, 2015
Offeror Questions to the DCRB	December 14, 2015
DCRB Response to Offeror Questions	December 18, 2015
<b>Proposal Due Date</b>	January 8, 2016

Page 26:

- “R.” was missing from General Terms and Conditions sequence. Corrected lettering sequence as follows:
  - R. Governing Laws
  - S. Freedom of Information Act
  - T. Insurance Requirements
  - U. Order of Precedence

Except as provided herein, all terms and conditions of the document referenced in RFP DCRB-16-003, as heretofore changed, remains unchanged and in full force and effect. Please contact DCRB.Procurement@dc.gov with any questions.