

RECOMMENDATION FOR LAW FIRM SELECTION

Date: February 28, 2017

To: Rodney R. Akers
Deputy General Counsel, as designee for
The Honorable Denise J. Smyler, General Counsel

From: Jordan M. Kiessling
Issuing Officer

CC: Shawn E. Smith
Deputy Chief Counsel
Department of General Services

RE: Evaluation of Proposals Submitted in Response to
RFP OGC-2016-14 (Western Region) Issued July 6, 2016

PART I.

This RFP was issued pursuant to Executive Order 2015-2 dated January 20, 2015, and in accordance with Section 518 of the Commonwealth Procurement Code, 62 Pa.C.S. § 518, and Part III Chapter 8 of the Department of General Services (DGS) Procurement Handbook.

The Issuing Office designated to conduct this procurement has completed its evaluation. As further described below, the following law firms are being recommended for award of a legal services contract:

Marshall Dennehey Warner Coleman & Goggin
Matis Baum O'Connor
O'Brien, Rulis & Bochicchio, LLC
Weber Gallagher Simpson Stapleton Fires & Newby, LLP
Margolis Edelstein (Conflict Firm)
Swartz Campbell, LLC (Conflict Firm)

This memorandum also documents that all necessary steps were taken in conducting the procurement in accordance with the provisions of the Commonwealth Procurement Code. To the extent that written determinations are required under the Code for any of the following steps and no attached record exists, this memorandum shall serve as written confirmation that such step occurred.

**** DUE TO THE URGENT NEED FOR LEGAL SERVICES, APPROVAL IS BEING SOUGHT FOR THE SELECTED LAW FIRMS TO BEGIN WORK IMMEDIATELY ****

PART II.

A. PUBLIC NOTICE: Public notice of the RFP was posted on both the DGS website and the Office of General Counsel's website on **July 6, 2016**.

B. EVALUATION COMMITTEE: An evaluation committee was established consisting of agency representatives from the **Pennsylvania Department of Insurance, Department of General Services and the Governor's Office of General Counsel**.

C. ADDENDA TO THE RFP: Potential offerors were given the opportunity in accordance with Section I-9 of the RFP to submit questions concerning the procurement to the Issuing Office. The official responses to the questions were incorporated into the RFP by addenda per Section I-10 of the RFP.

PART III.

A. CRITERIA: The relative importance of the major evaluation criteria established prior to opening the proposals consisted of **technical 60%, cost 20%, small diverse business (SDB) participation 20%**, and **10 law firm diversity bonus points**.

B. PROPOSALS: A total of **seven (7)** proposals were received on or before the due date of **August 2, 2016**. No law firms responded by stating that they would not be submitting proposals. No proposals were received late.

C. RESULTS:

1. The evaluation committee reported the following results of its evaluation to the Issuing Office:
2. As indicated in the Initial Scoring, all of the law firm's technical submissions received at least **70%** of the available technical points required in order to be eligible to be considered for award.
3. The Issuing Office evaluated and scored the cost proposals and law firm diversity submittals and combined the technical scores, cost scores, law firm diversity scores and the SDB scores received from the DGS Bureau of Diversity, Inclusion and Small Business Opportunities.

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4. INITIAL SCORING: The overall scoring for this procurement concluded as follows:

<i>Offeror</i>	<i>Technical Score</i>	<i>SDB Score</i>	<i>Price Score</i>	<i>Law Firm Diversity</i>	<i>Overall Score</i>
Margolis Edelstein	52.97	0.00	17.01	1.00	70.98
Marshall Dennehey Warner Coleman & Goggin	58.76	0.00	18.72	3.00	80.48
Matis Baum O'Connor	60.00	0.00	17.50	1.00	78.50
O'Brien, Rulis & Bochicchio, LLC	58.59	0.00	20.00	1.00	79.59
Swartz Campbell, LLC	51.58	0.00	14.44	1.00	67.02
Weber Gallagher Simpson Stapleton Fires & Newby, LLP	58.63	0.00	18.61	2.00	79.24
<i>Law Firms NOT Meeting 70% Technical Threshold</i>					
Clark Hill, PLC	41.97	N/A	N/A	N/A	N/A

5. NEGOTIATIONS:

As provided in the RFP, and pursuant to Section 518 of the Procurement Code, fair and reasonable compensation was negotiated, as needed, with the best qualified law firms prior to awards being made.

6. CONTRACTOR RESPONSIBILITY: Marshall Dennehey Warner Coleman & Goggin, Matis Baum O'Connor, O'Brien, Rulis & Bochicchio, LLC, Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Margolis Edelstein and Swartz Campbell, LLC, required to be disclosed or approved by the Commonwealth have been verified as responsible contractors in accordance with management directives, the Procurement Handbook and the Procurement Code, as applicable.

PART IV.

RECOMMENDATION: As the Issuing Officer, I recommend Marshall Dennehey Warner Coleman & Goggin, Matis Baum O'Connor, O'Brien, Rulis & Bochicchio, LLC, Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Margolis Edelstein and Swartz Campbell, LLC be awarded contracts for legal services. This recommendation selection is based upon the results of the evaluation and review of the proposals as summarized above. **The term of the contract will be three years with two (2) additional one (1) year renewals.** The Department


of Insurance, in consultation with the Office of General Counsel, will allocate the legal services set forth in the resulting contracts among the selected law firms. **Due to the urgent need for legal services, the Department of Insurance is seeking Marshall Dennehey Warner Coleman & Goggin, Matis Baum O'Connor, O'Brien, Rulis & Bochicchio, LLC, Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Margolis Edelstein and Swartz Campbell, LLC to begin work immediately.**

PART V.

CONTRACTING OFFICER DETERMINATION:

Based upon the results of the evaluation and the above recommendation, I have determined that Marshall Dennehey Warner Coleman & Goggin, Matis Baum O'Connor, O'Brien, Rulis & Bochicchio, LLC, Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Margolis Edelstein and Swartz Campbell, LLC are the best qualified law firms based on the evaluation factors set forth in the RFP.

I disapprove the recommendation.



Rodney R. Akers Date 25 February 2017
Deputy General Counsel, as designee for
The Honorable Denise J. Smyler, General Counsel

PART VI.

AUTHORIZATION:

Based upon the Contracting Officer's determination, I authorize the Issuing Office to make contract awards to Marshall Dennehey Warner Coleman & Goggin, Matis Baum O'Connor, O'Brien, Rulis & Bochicchio, LLC, Weber Gallagher Simpson Stapleton Fires & Newby, LLP, Margolis Edelstein and Swartz Campbell, LLC.

Pennsylvania Department of Insurance:



Amy G. Daubert
Chief Counsel

Date 3/3/2017