

RECOMMENDATION FOR LAW FIRM SELECTION

Date: November 1, 2017

To: 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-2017-07 (Area 1) Issued April 17, 2017

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 legal services contracts:

Law Office of Nathaniel M. Holmes, LLC
Sand & Sidel, PC
The Chartwell Law Offices, LLP

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 **April 17, 2017**.

B. EVALUATION COMMITTEE: An evaluation committee was established consisting of agency representatives from the **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 and small business (SDB/SB) participation 20%, and 10% law firm diversity bonus points.**

B. PROPOSALS: A total of **eight (8)** proposals were received on or before the due date of **May 18, 2017.** 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, **two (2) offeror's** technical submittals failed to receive **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/SB scores received from the DGS Bureau of Diversity, Inclusion and Small Business Opportunities.
4. INITIAL SCORING: The overall scoring for this procurement concluded as follows:

<i>Offeror</i>	<i>Technical Score</i>	<i>SDB/SB Score</i>	<i>Price Score</i>	<i>Law Firm Diversity</i>	<i>Overall Score</i>
The Chartwell Law Offices, LLP	60.00	1.50	17.28	1.00	79.78
Law Office of Nathaniel M. Holmes, LLC	53.74	20.00	20.00	5.00	98.74
O'Brien, Rulis & Bochicchio, LLC	59.30	0.00	13.62	1.00	73.92

Rawle & Henderson, LLP	57.67	0.00	18.09	2.00	77.76
Sand & Sidel, PC	59.39	4.00	16.81	1.00	81.20
Swartz Campbell, LLC	58.44	0.00	18.78	2.00	79.22
<i>Law Firms NOT Meeting 70% Technical Threshold</i>					
Ahmad Zaffarese, LLC	41.40	N/A	N/A	N/A	N/A
Merkin Shotland	41.77	N/A	N/A	N/A	N/A

5. FAIR AND REASONABLE COMPENSATION:

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

6. SMALL DIVERSE BUSINESS/SMALL BUSINESS COMMITMENTS:

The Law Office of Nathaniel M. Holmes, LLC is a certified Minority Business Enterprise and Small Diverse Business prime law firm. The Law Office of Nathaniel M. Holmes, LLC is also committed to subcontracting with one (1) small diverse firm, Litigation Advantage LLC, for legal services over the entire engagement timeframe. The Law Office of Nathaniel M. Holmes, LLC is committing **5%** of the total value of its offering to **Litigation Advantage LLC**.

Sand & Sidel, PC is committed to subcontracting with one (1) small diverse firm, Griesing Law, LLC, for legal services over the entire engagement timeframe. Sand & Sidel, PC is committing **20%** of the total value of its offering to **Griesing Law, LLC**.

The Chartwell Law Offices, LLP is committed to subcontracting with two (2) small diverse firms, Naples Law, LLP and the Law Office of Nathaniel M. Holmes, LLC, for legal services over the entire engagement timeframe. The Chartwell Law Offices, LLP is committing **2.5%** of the total value of its offering to **Naples Law, LLP** and **5%** of the total value of its offering to the **Law Office of Nathaniel M. Holmes, LLC**.

7. CONTRACTOR RESPONSIBILITY: The Chartwell Law Offices, LLP, Sand & Sidel, P.C., the Law Office of Nathaniel M. Holmes, LLC and their respective subcontractors 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.

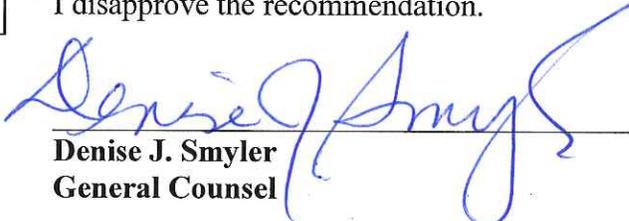
RECOMMENDATION: As the Issuing Officer, I recommend The Chartwell Law Offices, LLP, Sand & Saidel, P.C. and the Law Office of Nathaniel M. Holmes, LLC be awarded contracts for legal services. This recommendation selection is based upon the results of the evaluation and review of the proposals as summarized above. **The term of the contract will be one year 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 the Chartwell Law Offices, LLP, Sand & Saidel, P.C. and the Law Office of Nathaniel M. Holmes, 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 The Chartwell Law Offices, LLP, Sand & Saidel, P.C. and the Law Office of Nathaniel M. Holmes, LLC are the best qualified law firms based on the evaluation factors set forth in the RFP.

I disapprove the recommendation.


Denise J. Smyler
General Counsel

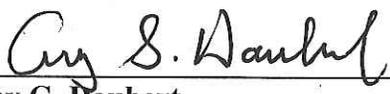
11/1/17
Date

PART VI.

AUTHORIZATION:

Based upon the Contracting Officer's determination, I authorize the Issuing Office to make contract awards to The Chartwell Law Offices, LLP, Sand & Saidel, P.C. and the Law Office of Nathaniel M. Holmes, LLC.

PENNSYLVANIA DEPARTMENT OF INSURANCE:


Amy G. Daubert
Chief Counsel

11/1/17
Date