



## Office of Thrift Supervision

Department of the Treasury

Procurement Management

1700 G Street, N.W., Washington, DC 20552 • (202) 906-6137

October 24, 2007

### REQUEST FOR PROPOSAL (RFP) OTS200500001-A Phase 4

**NOTE: CONTRACTOR MUST BE REGISTERED AT THE CENTRAL CONTRACTOR REGISTRATION DATABASE TO BE ELIGIBLE FOR AWARD. YOU MAY REGISTER AT [www.ccr.gov](http://www.ccr.gov) .**

The Office of Thrift Supervision (OTS), a bureau in the Department of the Treasury, invites you (“Offeror”) to submit a proposal for the following requirement:

**REQUIREMENT.** The OTS is seeking qualified contractors to perform bank examination related services. OTS intends to issue multiple Indefinite Delivery/Indefinite Quantity contracts with a base period and three one-year options. Work will be performed under this contract on a task basis, which means that OTS will issue firm fixed-price task orders to contractors on an as needed basis.

**RFP GUIDANCE.** The attached RFP contains detailed information regarding OTS’s requirement and the terms and conditions for contracts resulting from this solicitation. It also contains instructions for preparing your proposal and information about how OTS will evaluate and select contractors. It is organized as follows:

- **SF 33.** The SF 33 is a standard federal government form. The form’s “Solicitation” section provides you with general information regarding OTS’s solicitation for services. You must complete the section titled “Offeror”, if you wish to make a formal offer to OTS to provide bank examination services. This section must be completed and returned as part of your proposal.
- **Section B.** Your proposal must include, in Section B of the RFP, your hourly fee for providing bank examination services for the base period and each option year. This section must be completed and returned as part of your proposal.
- **Section C.** RFP Section C contains the performance work statement (PWS), which provides a detailed description of OTS’s bank examination services requirement. If you and the OTS enter into a contract, the PWS’s provisions will become binding on you and the OTS.
- **Sections D - I.** These sections contain additional provisions and clauses, which will become part of the contract.
- **Section J.** This section is the “List of Attachments”. The attachments contain reference information and/or forms for completion and submission with your proposal – includes:

- Frequently Asked Questions (FAQs)
- Access to Confidential or Sensitive Information. This section must be completed and returned as part of your proposal.
- Conflict of Interest Certification. This section must be completed and returned as part of your proposal.
- Ethics and Financial Disclosure Certification. This section must be completed and returned as part of your proposal.
- Confidential Financial Disclosure Report for Contract Employees Form. This section must be completed and returned as part of your proposal.
- Option Form 306. This form must be completed and returned as part of your proposal.
- SF85P. This form must be completed and returned as part of your proposal.
- **Section K.** This section contains representations and certifications, which must be completed. All of Section K must be submitted with your proposal. (It is highly encouraged that each contractor register on <https://orca.bpn.gov/>) (This section must be completed and returned as part of your proposal.)
- **Section L.** Section L provides detailed instructions for preparing your proposal. This section must be completed and returned as part of your proposal.
- **Section M.** This section explains how OTS will evaluate proposals and select contractors.

**PROPOSAL DUE DATE.** Written proposals must be received in OTS Headquarters by 2:00pm, ET, Friday, 9/30/2009. Proposals received after the deadline cannot be considered. You assume full responsibility for ensuring that your proposal is received by the deadline date and time. **Proposals will be evaluated upon receipt and awards will be made until the closing date.**

Please email your written proposal to: [contract.examiners@ots.treas.gov](mailto:contract.examiners@ots.treas.gov) .

If you cannot email your proposal, send it to:

Office of Thrift Supervision  
1700 G Street NW  
Washington, DC 20552  
Attn: Isabel Roman-Cogswell

If hand-carried/couriered: All hand-carried and courier-delivered proposals must be taken to the OTS lobby at 1700 G Street NW, Washington, DC. The security guard will ask for identification and have you sign the visitor's log.

**SMALL BUSINESS INFORMATION.** Under this procurement process, the OTS may award a contract directly to you. There is no third-party involved. As a contractor, if you are not already a business entity, you may become a small business. As such, there are numerous issues for you to consider, such as the examples that follow:

- You will be responsible for submitting accurate and timely invoices to OTS for payment of your services.
- You will generally have to pay self-employment tax and make federal and state estimated tax payments. OTS will issue to you the necessary Form 1099.
- You must maintain adequate and accurate records that will satisfy federal and state taxing authorities.
- There may be legal aspects to consider (e.g., zoning laws, licenses, tax identification numbers, business use of your residence)
- You may wish to prepare a business plan and be able to prepare and understand financial statements.

The U.S. Small Business Administration and local Chambers of Commerce are excellent resources for information on owning/managing a small business. The Internal Revenue Service has many free publications explaining tax implications.

The OTS assumes no responsibility related to your small business entity outside of a contractual relationship with you.

**STANDING SOLICITATION.** This is a standing solicitation from which the OTS contemplates future awards for the services described herein. This solicitation will remain in effect unless it is cancelled or replaced by an updated solicitation. The written amendments will be posted at the following Federal Business Opportunity website: <http://www.fbo.gov>