



DEPARTMENT OF ECONOMIC SECURITY

Douglas A. Ducey
Governor

Your Partner For A Stronger Arizona

Michael Wisehart
Director

DATE: September 22, 2021

TO: Solicitation File

FROM: Athena Begay, Sr. Procurement Specialist

SUBJECT: Executive Summary
SOLICITATION NUMBER: BPM003645
SOLICITATION TITLE: Community Education and Information (Support and Consultation on TBI/SCI)

DIVISION: Division of Employment and Rehabilitation Services (DERS), Rehabilitation Service Administration (RSA)

This Request for Proposal (RFP) commenced under the Arizona Administrative Code (A.A.C) Arizona Procurement Code Revised July 2020 and Arizona Revised Statutes (A.R.S) Title 41, State Government § 41-2534.

DATE	EVENT AND DESCRIPTION
Pre-Solicitation Activities	
March 16, 2021	Solicitation request received.
Solicitation Process	
June 15, 2021	This solicitation was issued electronically via the State's eProcurement website, Arizona Procurement Portal (APP) for commodity codes: [99102002 – Community Education and Information H011-CP]. An electronic notification was sent to 249 prospective suppliers who were registered in APP.
June 18, 2021	The solicitation was formally advertised in Daily Independent in accordance with A.R.S. § 41-2534(C) and A.A.C. R2-7-C301(B),
June 24, 2021	Pre-Offer Conference was conducted via teleconference.
July 1, 2021	Solicitation Amendment No. 1 was issued.

Evaluation Process	
July 13, 2021, 3:00 P.M. MST	Proposals due. A total of five (5) submittal received as follows: <ul style="list-style-type: none">• Amani Community Center• Carol Lopinski and Associates LLC• Empowerment Research LLC• Katherine Christensen & Associates Inc• Raising Special Kids
July 14 – 15, 2021	Evaluation Committee trained on the process, roles, and responsibilities. Confidentiality statements signed by Evaluation Committee members. Committee members were: <ul style="list-style-type: none">• Fiona Donohoe, Statewide Developmental Disabilities Coordinator• Lindsey Powers, Council Liaison

	<ul style="list-style-type: none"> • Lynda Kosnik, Employment Initiative Coordinator
July 15 – Sept.9, 2021	References were checked via email.
July 20 – August 11, 2021	Initial Consensus Evaluation conducted in accordance with A.A.C. R2-7-C316.
August 23 – 26, 2021	Negotiations Conducted with Offeror(s) deemed reasonably susceptible for award.
August 27, 2021	A request for Best and Final Offer issued in APP to all Offerors reasonably susceptible for award, in accordance with A.A.C. R2-7-C315,
September 1, 2021, 3:00 P.M. MST	Best and Final Offers Received.
September 10 – 13, 2021	Best and Final Offer Consensus Evaluation conducted, in accordance with A.A.C. R2-7-C316,
September 13, 2021	Recommendations of award(s) made by Evaluation Committee is as follows: <ul style="list-style-type: none"> • Amani Community Center • Carol Lopinski and Associates LLC • Empowerment Research LLC • Katherine Christensen & Associates Inc • Raising Special Kids
September 16, 2021	Verified Offeror is not on Excluded Parties List.

September 22, 2021 A Determination for Award was made in accordance with R2-7-C317.

The proposals were evaluated with a total possible score for each Service Category and Component.

- Service Category 1 – Community Based Events,
 1. Component A, Design/Development, 755.00 points
 2. Component B, Implementation, 505.00 points
- Service Category 2 – Educational and Training,
 1. Component A, Design/Production, 555.00 points
 2. Component B, Implementation, 455.00 points
- Service Category 3 – Consultation for Council-Related Meetings and Events,
 1. Component A, Support, 230.00 points
 2. Component B, Strategic Planning, 230 points
 3. Component C, Grant Applications, 205 points
 4. Component D, Grant Related Activities, 205 points.

The evaluation criteria used for the RFP for the following categories are as follows:

- Service Category 1 – Community Education
 1. Method of Approach
 2. Responsiveness of Proposal
 3. Experience
- Service Category 2 – Educational and Training
 1. Method of Approach

- 2. Responsiveness of Proposal
- 3. Experience
- Service Category 3 – Consultation
 - 1. Experience
 - 2. Responsiveness of Proposal

The recommendation is based on the following points based on the evaluation criteria:

Initial Evaluation Consensus

Initial Overall Scoring: Initial for SC 1-A

	Max	Amani Community	Carol Lopinski	Empowerment Research	Katherine Christensen
Method of Approach	325	156.25	225.00	262.50	162.50
Responsiveness	300	125.00	150.00	200.00	150.00
Experience	130	50.00	120.00	120.00	50.00
	755.00	331.25	495.00	582.50	362.50

* Total points Possible for 100% Meets Expectation = 377.5

(Method of Approach: 162.5; Responsiveness: 150; Experience: 65)

Initial Overall Scoring: for SC 1 -B

	Max	Amani Community	Carol Lopinski	Katherine Christensen
Method of Approach	200.00	81.25	87.50	87.50
Responsiveness	175.00	62.50	87.50	87.50
Experience	130.00	50.00	120.00	50.00
	505.00	193.75	295.00	225.00

* Total points Possible for 100% Meets Expectation = 252.5

(Method of Approach: 100; Responsiveness: 87.5; Experience: 65)

Overall Scoring: Initial for SCI2-A

Service Category 2 - Edu and Training Prgm, Comp A

	Max	Amani Community Center	Carol Lopinski Assoc LLC	Empowerment Research LLC	Raising Special Kids
Method of Approach	275	87.50	137.50	225.00	137.50
Responsiveness	150	50.00	75.00	125.00	75.00
Experience	130	50.00	120.00	120.00	67.00
	555.00	187.50	332.50	470.00	279.50

*Total points Possible for 100% Meets Expectation = 277.5

(Method of Approach: 137.5; Responsiveness: 75; Experience: 65)

Overall Scoring: Initial for SC 2-B**Service Category 2 - Education and Training Program, Component B**

	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC	Raising Special Kids
Method of Approach	175.00	87.50	137.50	87.50
Responsiveness	150.00	75.00	125.00	75.00
Experience	130.00	120.00	120.00	67.00
	455.00	282.50	382.50	229.50

***Total points Possible for 100% Meets Expectation = 227.5**

(Method of Approach: 87.5; Responsiveness: 75; Experience: 65)

Overall Scoring: Initial for SC 3-A**Service Category - 3 Consult Meeting, Comp. A**

	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	130.00	120.00	120.00
Responsiveness	100.00	50.00	100.00
	230.00	170.00	220.00

***Total Points Possible for 100% Meets Rating: 115**

(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: Initial for SC 3-B**Service Category 3 - Component B**

	Max	Carol Lopinski Assoc LLC
Experience	130.00	70.00
Responsiveness	100.00	50.00
	230.00	120.00

***Total Points Possible for 100% Meets Rating: 115**

(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: Initial for SC 3-C**Service Category - 3, Component C**

	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105.00	95.00	95.00
Responsiveness	100.00	50.00	100.00
	205.00	145.00	195.00

***Total Points Possible for 100% Meets Rating: 102.5**

(Experience - 52.5; Responsiveness - 50.00)

Overall Scoring: Initial for SC 3-D**Service Category - 3, Component D**

	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105.00	95.00	95.00
Responsiveness	100.00	50.00	100.00
	205.00	145.00	195.00

****Total Points Possible for 100% Meets Rating: 102.5**

(Experience - 52.5; Responsiveness - 50.00)



DEPARTMENT OF ECONOMIC SECURITY

Douglas A. Ducey
Governor

Your Partner For A Stronger Arizona

Michael Wisehart
Director

BAFO Evaluation Consensus

Overall Scoring: BAFO for Community Based Events SC 1-A	Max	Amani Community	Carol Lopinski	Empowerment Research	Katherine Christensen
Method of Approach	325	162.50	225.00	262.50	162.50
Responsiveness	300	150.00	150.00	200.00	150.00
Experience	130	70.00	129.00	130.00	80.00
	755.00	382.50	504.00	592.50	392.50

* Total points Possible for 100% Meets Expectation = 377.50

(Method of Approach: 162.5; Responsiveness: 150; Experience: 65)

Overall Scoring: BAFO for Community Based Events SC 1-B	Max	Amani Community	Carol Lopinski	Katherine Christensen
Method of Approach	200	100.00	112.50	100.00
Responsiveness	175	87.50	87.50	87.50
Experience	130	70.00	129.00	80.00
	505.00	257.50	329.00	267.50

* Total points Possible for 100% Meets Expectation = 252.50

(Method of Approach: 100; Responsiveness: 87.5; Experience: 65)

Overall Scoring: BAFO for Education & Training SC 2-A	Max	Amani Community Center	Carol Lopinski Assoc LLC	Empowerment Research LLC	Raising Special Kids
Method of Approach	275	87.50	137.50	225.00	137.50
Responsiveness	150	75.00	75.00	125.00	75.00
Experience	130	70.00	129.00	130.00	67.00
	555.00	232.50	341.50	480.00	279.50

*Total points Possible for 100% Meets Expectation = 277.50

(Method of Approach: 137.5; Responsiveness: 75; Experience: 65)

Overall Scoring: BAFO for Education & Training SC 2-B	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC	Raising Special Kids
Method of Approach	175	87.50	137.50	87.50
Responsiveness	150	75.00	125.00	75.00
Experience	130	129.00	130.00	67.00
	455.00	291.50	392.50	229.50

*Total points Possible for 100% Meets Expectation = 227.50

(Method of Approach: 87.5; Responsiveness: 75; Experience: 65)

Overall Scoring: BAFO for Consultation SC 3-A	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	130	129.00	130.00
Responsiveness	100	50.00	100.00
	230.00	179.00	230.00

*Total Points Possible for 100% Meets Rating: 115.00

(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: BAFO for Consultation SC 3-B	Max	Carol Lopinski Assoc LLC	
Experience	130	79.00	
Responsiveness	100	50.00	
	230.00	129.00	

*Total Points Possible for 100% Meets Rating: 115.00

(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: BAFO for Consultation SC 3-C	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105	104.00	105.00
Responsiveness	100	50.00	100.00
	205.00	154.00	205.00

*Total Points Possible for 100% Meets Rating: 102.50

(Experience - 52.50 Responsiveness - 50.00)

Overall Scoring: BAFO for Consultation SC 3-D	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105	104.00	105.00
Responsiveness	100	50.00	100.00
	205.00	154.00	205.00

*Total Points Possible for 100% Meets Rating: 102.50

(Experience - 52.50 Responsiveness - 50.00)

Basis of Award

In accordance with A.R.S. §41-2534(G) and A.A.C R2-7-C317, the solicitation shall be awarded to the Offeror determined to be most advantageous to the state in accordance with the evaluation factors identified in the request for proposal, therefore, the Office of Procurement recommends the following award(s) and the Chief Procurement Officer concurs.

Community Based Events- SC 1- A

Amani Community
Carol Lopinski
Empowerment Research
Katherine Christensen

Community Based Events- SC 1 -B

Amani Community
Carol Lopinski
Katherine Christensen

Education & Training - SC 2-A

Carol Lopinski
Empowerment Research
Raising Special Kids

Education & Training SC 2- B

Carol Lopinski
Empowerment Research
Raising Special Kids

Consultation - SC 3-A

Carol Lopinski
Empowerment Research

Consultation - SC 3-B

Carol Lopinski

Consultation - SC 3-C

Carol Lopinski
Empowerment Research

Consultation - SC 3-D

Carol Lopinski
Empowerment Research



David Steuber
Chief Procurement Officer
Arizona Department of Economic Security

Date: 9/22/2021



DEPARTMENT OF ECONOMIC SECURITY

Douglas A. Ducey
Governor

Your Partner For A Stronger Arizona

Michael Wisehart
Director

Date: September 22, 2021

Subject: Contract Award **Determination (R2-7-C317)**

Solicitation #: BPM003645

Solicitation Title: Community Education and Information (Support and Consultation on TBI/SCI)

This Contract Award Determination is made in accordance with the Arizona Administrative Code, R2-7-C317. I have reviewed the detailed evaluation of the proposals and the recommendations of the Evaluation Committee to award Contracts to:

- Amani Community Center
- Carol Lopinski and Associates LLC
- Empowerment Research LLC
- Katherine Christensen & Associates Inc
- Raising Special Kids

The findings of the Evaluation Committee are valid, I concur with and accept their findings (R2-7-C316) and recommendation to award the Contract to the above Offerors because its offer is the most advantageous to the State based on the evaluation factors set forth in the solicitation and is the best offer in accordance with the evaluation of the offers.



David Steuber
Chief Procurement Officer

cc: Procurement File

BPM003645 Community Education and Information (Support and Consultation on TBI/SCI)

Initial Overall Score

Overall Scoring: Initial for Community Based Events SC 1-A	Max	Amani Community	Carol Lopinski	Empowerment Research	Katherine Christensen
Method of Approach	325	156.25	225.00	262.50	162.50
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Experience	130	50.00	120.00	120.00	50.00
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(Method of Approach: 162.5; Responsiveness: 150; Experience: 65)

Overall Scoring: Initial for Community Based Events SC 1-B	Max	Amani Community	Carol Lopinski	Katherine Christensen
Method of Approach	200	81.25	87.50	87.50
Responsiveness	175	62.50	87.50	87.50
Experience	130	50.00	120.00	50.00
	505.00	193.75	295.00	225.00

* Total points Possible for 100% Meets Expectation = 252.5

(Method of Approach: 100; Responsiveness: 87.5; Experience: 65)

Overall Scoring: Initial for Education & Training SC 2-A	Max	Amani Community Center	Carol Lopinski Assoc LLC	Empowerment Research LLC	Raising Special Kids
Method of Approach	275	87.50	137.50	225.00	137.50
Responsiveness	150	50.00	75.00	125.00	75.00
Experience	130	50.00	120.00	120.00	67.00
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Overall Scoring: Initial for Consultation SC 3-A	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	130	120.00	120.00
Responsiveness	100	50.00	100.00
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(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: Initial For Consultation SC 3-B	Max	Carol Lopinski Assoc LLC
Experience	130	70.00
Responsiveness	100	50.00
	230.00	120.00

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(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: Initial for Consultation SC 3-C	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105	95.00	95.00
Responsiveness	100	50.00	100.00
	205.00	145.00	195.00

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(Experience - 52.50 Responsiveness - 50.00)

Overall Scoring: Initial for Consultation SC 3-D	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105	95.00	95.00
Responsiveness	100	50.00	100.00
	205.00	145.00	195.00

*Total Points Possible for 100% Meets Rating: 102.5

(Experience - 52.50 Responsiveness - 50.00)

Evaluation Committee Members Recommendation

The members of the evaluation committee have completed their review of the proposals. Based on the Consensus evaluation of the offerors proposals, it would be in the best interest of the State to enter into Negotiation with the following Offerors for the respective Service Category and Components:

Community Based Events- SC 1-A

Amani Community
Carol Lopinski
Empowerment Research
Katherine Christensen

Community Based Events- SC 1-B

Amani Community
Carol Lopinski
Katherine Christensen

Education & Training - SC 2-A

Amani Community
Carol Lopinski
Empowerment Research
Raising Special Kids

Education & Training SC 2-B

Carol Lopinski
Empowerment Research
Raising Special Kids

Consultation - SC 3-A

Carol Lopinski
Empowerment Research

Consultation - SC 3-B

Carol Lopinski

Consultation - SC 3-C

Carol Lopinski
Empowerment Research

Consultation - SC 3-D

Carol Lopinski
Empowerment Research

As a participating member of the evaluation committee, I agree with the information provided in this document and concur that the consensus scoring is a complete and accurate reflection of the committee's agreement regarding the evaluation of the proposals received.

Fiona Donohoe

Fiona Donohoe (Aug 12, 2021 17:48 PDT)

Evaluation Committee Member

Lynda D. Kosnik

Evaluation Committee Member

Lindsey Powers

Lindsey Powers (Aug 13, 2021 14:19 PDT)

Evaluation Committee Member

BPM003645 Community Education and Information (Support and Consultation on TBI/SCI)

BAFO Overall Score

Overall Scoring: BAFO for Community Based Events SC 1-A	Max	Amani Community	Carol Lopinski	Empowerment Research	Katherine Christensen
Method of Approach	325	162.50	225.00	262.50	162.50
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Experience	130	70.00	129.00	130.00	80.00
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Overall Scoring: BAFO for Community Based Events SC 1 -B	Max	Amani Community	Carol Lopinski	Katherine Christensen
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Responsiveness	175	87.50	87.50	87.50
Experience	130	70.00	129.00	80.00
	505.00	257.50	329.00	267.50

* Total points Possible for 100% Meets Expectation = 252.50

(Method of Approach: 100; Responsiveness: 87.5; Experience: 65)

Overall Scoring: BAFO for Education & Training SC 2-A	Max	Amani Community Center	Carol Lopinski Assoc LLC	Empowerment Research LLC	Raising Special Kids
Method of Approach	275	87.50	137.50	225.00	137.50
Responsiveness	150	75.00	75.00	125.00	75.00
Experience	130	70.00	129.00	130.00	67.00
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(Method of Approach: 137.5; Responsiveness: 75; Experience: 65)

Overall Scoring: BAFO for Education & Training SC 2-B	Max	Carol Lopinski Assoc LLC	Empowerment Research LLC	Raising Special Kids
Method of Approach	175	87.50	137.50	87.50
Responsiveness	150	75.00	125.00	75.00
Experience	130	129.00	130.00	67.00
	455.00	291.50	392.50	229.50

*Total points Possible for 100% Meets Expectation = 227.50

(Method of Approach: 87.5; Responsiveness: 75; Experience: 65)

Overall Scoring: BAFO for Consultation SC 3-A

Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	130	129.00
Responsiveness	100	50.00
	230.00	179.00

*Total Points Possible for 100% Meets Rating: 115.00

(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: BAFO for Consultation SC 3-B

Max	Carol Lopinski Assoc LLC
Experience	130
Responsiveness	100
	230.00

*Total Points Possible for 100% Meets Rating: 115.00

(Experience - 65.00; Responsiveness - 50.00)

Overall Scoring: BAFO for Consultation SC 3-C

Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105	104.00
Responsiveness	100	50.00
	205.00	154.00

*Total Points Possible for 100% Meets Rating: 102.50

(Experience - 52.50 Responsiveness - 50.00)

Overall Scoring: BAFO for Consultation SC 3-D

Max	Carol Lopinski Assoc LLC	Empowerment Research LLC
Experience	105	104.00
Responsiveness	100	50.00
	205.00	154.00

*Total Points Possible for 100% Meets Rating: 102.50

(Experience - 52.50 Responsiveness - 50.00)

Evaluation Committee Members Recommendation

The members of the evaluation committee have completed their review of the proposals. Based on the Consensus evaluation of the offerors proposals, it would be in the best interest of the State to **Award** to the following Offerors for the respective Service Category and Components:

Community Based Events- SC 1- A

Amani Community
Carol Lopinski
Empowerment Research
Katherine Christensen

Community Based Events- SC 1 -B

Amani Community
Carol Lopinski
Katherine Christensen

Education & Training - SC 2-A

Carol Lopinski
Empowerment Research
Raising Special Kids

Education & Training SC 2- B

Carol Lopinski
Empowerment Research
Raising Special Kids

Consultation - SC 3-A

Carol Lopinski
Empowerment Research

Consultation - SC 3-B

Carol Lopinski

Consultation - SC 3-C

Carol Lopinski
Empowerment Research

Consultation - SC 3-D

Carol Lopinski
Empowerment Research

As a participating member of the evaluation committee, I agree with the information provided in this document and concur that the consensus scoring is a complete and accurate reflection of the committee's agreement regarding the evaluation of the proposals received.

Fiona Donohoe

Fiona Donohoe (Sep 13, 2021 10:16 PDT)

Evaluation Committee Member

Lindsey Powers

Lindsey Powers (Sep 13, 2021 09:46 PDT)

Evaluation Committee Member

Lynda D. Kosak

Evaluation Committee Member



ARIZONA DEPARTMENT OF ADMINISTRATION
STATE PROCUREMENT OFFICE

PROCUREMENT DISCLOSURE STATEMENT

(Solicitation # BPM003645)

*Community Education and Information (Support and
Consultation on TBI & SCI)*

Dear Employee:

You have been selected to participate in the particular procurement activity as referenced above. Your selection was based on your technical knowledge and expertise in this area. Your regular job duties may not include procurement activities but for the purpose of this process you may play a significant procurement role in one or more of the following: participating in the development of a procurement as defined in ARS § 41-2503; participating in the development of an evaluation tool; approving a procurement as defined in ARS § 41-2503 or an evaluation tool; serving as a technical advisor or an evaluator who evaluates a procurement as defined in ARS § 41-2503; or recommending or selecting a vendor that will provide materials, services or construction to this state.

It is essential that the integrity of the procurement process be maintained to ensure that each Offeror is given fair and equal consideration. Your familiarity with particular brands, types of equipment, material, services, individuals or firms may tend to influence your evaluation; however, you are required in this specific instance to be particularly objective and guard against any tendency that might slant your evaluation in favor of a personal preference.

You are required to report to the Procurement Officer, or person facilitating the above referenced procurement process, any actual or potential conflict of interest as defined in A.R.S. § 38-503, § 41-2616C, § 41-753 and § 41-2517. You are also subject to the Code of Ethics set forth in Section R2-5A-501 of the Arizona Department of Administration, Personnel Division, Administrative Rules and Regulations.

An additional consideration is the legal mandate to maintain strict security and confidentiality regarding the content of any proposal, as well as the proceedings of the Evaluation Committee meetings during the evaluation process. Once the evaluation process has started, it is essential that any contact with Offerors, other than that disclosed, be through, and by, the Procurement Officer or person facilitating the above referenced procurement.

In addition, the Employee shall not have any communication related in any way to the particular procurement, except during formal Committee meetings, with any Offeror or potential subcontractor to that Offeror prior to award, nor shall that Member discuss the proposal or their evaluation with anyone other than the Procurement Officer, or person facilitating the above referenced procurement and Evaluation Committee Members. This is mandatory.

A person who holds a Significant Procurement Role as defined by ARS § 41-741 and § 41-2503 for a particular procurement shall sign a statement before starting any participation that the person has no financial interest in the procurement other than that disclosed and will have no contact with any representative of a competing Offeror related to the particular procurement during the course of evaluation of proposals, except those contacts specifically authorized by sections ARS § 41-2534, § 41-2537, § 41-2538 and § 41-2578. The person shall disclose on this statement any contact unrelated to the pending procurement that the person may need to have with a representative of a competing offeror and any contact with a representative of a competing offeror during evaluation of proposals except those contacts specifically authorized by sections ARS § 41-2534, § 41-2537, § 41-2538 and § 41-2578. A person who has been identified as having a significant procurement role for this procurement and fails to disclose contact with a representative of a competing offeror or who fails to provide accurate information on this statement is subject to civil penalty of at least one thousand dollars but not more than ten thousand dollars.

PROCUREMENT DISCLOSURE STATEMENT

As mandated by A.R.S. § 38-503, I, **Lindsey Powers**,

have listed on this form all ownerships, employments, public and private affiliations and relationships held by me and/or a relative¹ which may have a substantial (pecuniary² and proprietary³) interest as defined in A.R.S. § 38-502 (11) in any contract, sale, purchase or service involving the agency. I understand that as my interests or those of my relatives change, I may need to modify this statement.

The substantial interests, both pecuniary and proprietary, held by me and/or a relative which may involve the State include (attach additional sheets as necessary):

During the course of my regular business, I may have contact, unrelated to this procurement, with the Offerors listed below, who have submitted proposals in response to this solicitation (attach additional sheets as necessary):

¹"Relative" means my spouse, child, child's child, parent, grandparent, brother or sister (of the whole or half-blood) and their spouses and the parent, brother, sister or child of my spouse.

²"Pecuniary" means money or economic or other benefits that can be valued in monetary terms

³"Proprietary" means ownership or rights by virtue of ownership, whether public or private.

Citations listed above are available on the SPO website, www.spo.az.gov.

Statements

The Undersigned attests to and agrees to abide by the following statements:

I have read and understand the above and agree to be bound by the rules and principles represented. If applicable, I have also received, read and understand the Evaluation Committee Instructions for this procurement. I know of no conflict of interest on my part nor have I committed any indiscretion or accepted any gratuities or favors that would compromise my impartiality. Further, I will not accept an offer of employment from or have employment discussions with any person or entity lobbying for or potentially responding to a solicitation during the defined time frame stated in ARS § 41-753. I will maintain all deliberations of the Evaluation Committee in strict confidence during the evaluation process. My recommendations shall be based upon an objective/subjective review of the Offeror's response and the appropriate award criteria from the solicitation in accordance with the Arizona Procurement Code. I have read and understand ARS § 41-753, § 41-2517 and § 41-2616C and will fully comply with the requirements.

I have not and will not communicate with any potential Offeror or vendor in preparation of specifications/scopes of work, evaluation tool or other confidential information related to the above referenced Solicitation which would provide an unfair advantage or to prepare specifications/scopes of work which favor particular vendor(s).

I have not and will not provide insight, confidential information or assistance to any potential Offeror or vendor that might give an unfair advantage or inhibit fair competition for the above referenced Solicitation. My input regarding the development of the Solicitation documents, if any, has been and will be based solely on the State's requirements. I have not and will not communicate those requirements or confidential information to any potential Offeror or vendor.

PROCUREMENT DISCLOSURE STATEMENT

I know of no conflict of interest on my part nor shall I take any action (e.g., commit an indiscretion or accept any gratuities or favors) that would compromise my impartiality or my responsibilities. Should a conflict of interest become known to me relevant to my role, I shall immediately disclose such conflict of interest.

I shall not receive any direct benefit from the utilization of confidential information, specifications, plans, scopes of work, or evaluation tools I prepared or assisted in the preparation of.

I shall maintain strict security and confidentiality regarding the content of any proposal, as well as the proceedings of the Evaluation Committee meetings during the evaluation process that I may be a participant or attend as a committee member or a technical advisor.

I shall maintain strict security and confidentiality regarding the process or decisions regarding any protest or appeal that I am a participant, advisor or decision maker.

Whether recommending or selecting a vendor that will provide materials, services or construction to the State, approving a procurement or an evaluation tool or soliciting quotes greater than ten thousand dollars for the provision of materials, services or construction, I shall maintain strict security and confidentiality regarding the process and decisions to ensure fair competition.

Upon termination of my employment with the State, for any reason, these provisions and statements remain in effect until such time as the solicitation has been successfully awarded by the State, or the State provides me a written release. These provisions and statements apply if I accept employment with any entity, its affiliates, subcontractors, or business partners that may submit an offer or are included in an offer to this solicitation. I shall not accept an offer of employment from or have employment discussions with any person or entity lobbying for or potentially responding to a solicitation for one year following the delivery of purchased materials or the purchase of services or construction begins.

I understand that if I knowingly violate the terms of this Agreement, I will be subject to suspension for not less than ninety days or dismissal from State service.

The Undersigned has read and understands the above and agrees to be bound by the statements, rules and principles represented herein and in accordance with the provisions of the State Statutes and Rules regarding personnel, conflict of interest, confidentiality and procurement.

Please check the box below if applicable:

Yes No I am an architect or an engineer registered pursuant to section 32-121

Yes No I am a State employee who was employed within the past year by a person or firm responding to a solicitation, pursuant to section 41-2517(E)

Lindsey Powers

Digitally signed by Lindsey Powers
Date: 2021.07.08 13:17:17 -07'00'

Signature

Lindsey Powers

Name (Print)

Council Liaison

Title

7/08/2021

Date

DERS, RSA

Agency

(480) 640-3208

Phone



ARIZONA DEPARTMENT OF ADMINISTRATION
STATE PROCUREMENT OFFICE

PROCUREMENT DISCLOSURE STATEMENT

(Solicitation # BPM003645)

*Community Education and Information (Support and
Consultation on TBI & SCI)*

Dear Employee:

You have been selected to participate in the particular procurement activity as referenced above. Your selection was based on your technical knowledge and expertise in this area. Your regular job duties may not include procurement activities but for the purpose of this process you may play a significant procurement role in one or more of the following: participating in the development of a procurement as defined in ARS § 41-2503; participating in the development of an evaluation tool; approving a procurement as defined in ARS § 41-2503 or an evaluation tool; serving as a technical advisor or an evaluator who evaluates a procurement as defined in ARS § 41-2503; or recommending or selecting a vendor that will provide materials, services or construction to this state.

It is essential that the integrity of the procurement process be maintained to ensure that each Offeror is given fair and equal consideration. Your familiarity with particular brands, types of equipment, material, services, individuals or firms may tend to influence your evaluation; however, you are required in this specific instance to be particularly objective and guard against any tendency that might slant your evaluation in favor of a personal preference.

You are required to report to the Procurement Officer, or person facilitating the above referenced procurement process, any actual or potential conflict of interest as defined in A.R.S. § 38-503, § 41-2616C, § 41-753 and § 41-2517. You are also subject to the Code of Ethics set forth in Section R2-5A-501 of the Arizona Department of Administration, Personnel Division, Administrative Rules and Regulations.

An additional consideration is the legal mandate to maintain strict security and confidentiality regarding the content of any proposal, as well as the proceedings of the Evaluation Committee meetings during the evaluation process. Once the evaluation process has started, it is essential that any contact with Offerors, other than that disclosed, be through, and by, the Procurement Officer or person facilitating the above referenced procurement.

In addition, the Employee shall not have any communication related in any way to the particular procurement, except during formal Committee meetings, with any Offeror or potential subcontractor to that Offeror prior to award, nor shall that Member discuss the proposal or their evaluation with anyone other than the Procurement Officer, or person facilitating the above referenced procurement and Evaluation Committee Members. This is mandatory.

A person who holds a Significant Procurement Role as defined by ARS § 41-741 and § 41-2503 for a particular procurement shall sign a statement before starting any participation that the person has no financial interest in the procurement other than that disclosed and will have no contact with any representative of a competing Offeror related to the particular procurement during the course of evaluation of proposals, except those contacts specifically authorized by sections ARS § 41-2534, § 41-2537, § 41-2538 and § 41-2578. The person shall disclose on this statement any contact unrelated to the pending procurement that the person may need to have with a representative of a competing offeror and any contact with a representative of a competing offeror during evaluation of proposals except those contacts specifically authorized by sections ARS § 41-2534, § 41-2537, § 41-2538 and § 41-2578. A person who has been identified as having a significant procurement role for this procurement and fails to disclose contact with a representative of a competing offeror or who fails to provide accurate information on this statement is subject to civil penalty of at least one thousand dollars but not more than ten thousand dollars.

PROCUREMENT DISCLOSURE STATEMENT

As mandated by A.R.S. § 38-503, I, _____, have listed on this form all ownerships, employments, public and private affiliations and relationships held by me and/or a relative¹ which may have a substantial (pecuniary² and proprietary³) interest as defined in A.R.S. § 38-502 (11) in any contract, sale, purchase or service involving the agency. I understand that as my interests or those of my relatives change, I may need to modify this statement.

The substantial interests, both pecuniary and proprietary, held by me and/or a relative which may involve the State include (attach additional sheets as necessary):

During the course of my regular business, I may have contact, unrelated to this procurement, with the Offerors listed below, who have submitted proposals in response to this solicitation (attach additional sheets as necessary):

¹“Relative” means my spouse, child, child’s child, parent, grandparent, brother or sister (of the whole or half-blood) and their spouses and the parent, brother, sister or child of my spouse.

²“Pecuniary” means money or economic or other benefits that can be valued in monetary terms

³“Proprietary” means ownership or rights by virtue of ownership, whether public or private.

Citations listed above are available on the SPO website, www.spo.az.gov.

Statements

The Undersigned attests to and agrees to abide by the following statements:

I have read and understand the above and agree to be bound by the rules and principles represented. If applicable, I have also received, read and understand the Evaluation Committee Instructions for this procurement. I know of no conflict of interest on my part nor have I committed any indiscretion or accepted any gratuities or favors that would compromise my impartiality. Further, I will not accept an offer of employment from or have employment discussions with any person or entity lobbying for or potentially responding to a solicitation during the defined time frame stated in ARS § 41-753. I will maintain all deliberations of the Evaluation Committee in strict confidence during the evaluation process. My recommendations shall be based upon an objective/subjective review of the Offeror’s response and the appropriate award criteria from the solicitation in accordance with the Arizona Procurement Code. I have read and understand ARS § 41-753, § 41-2517 and § 41-2616C and will fully comply with the requirements.

I have not and will not communicate with any potential Offeror or vendor in preparation of specifications/scopes of work, evaluation tool or other confidential information related to the above referenced Solicitation which would provide an unfair advantage or to prepare specifications/scopes of work which favor particular vendor(s).

I have not and will not provide insight, confidential information or assistance to any potential Offeror or vendor that might give an unfair advantage or inhibit fair competition for the above referenced Solicitation. My input regarding the development of the Solicitation documents, if any, has been and will be based solely on the State’s requirements. I have not and will not communicate those requirements or confidential information to any potential Offeror or vendor.

PROCUREMENT DISCLOSURE STATEMENT

I know of no conflict of interest on my part nor shall I take any action (e.g., commit an indiscretion or accept any gratuities or favors) that would compromise my impartiality or my responsibilities. Should a conflict of interest become known to me relevant to my role, I shall immediately disclose such conflict of interest.

I shall not receive any direct benefit from the utilization of confidential information, specifications, plans, scopes of work, or evaluation tools I prepared or assisted in the preparation of.

I shall maintain strict security and confidentiality regarding the content of any proposal, as well as the proceedings of the Evaluation Committee meetings during the evaluation process that I may be a participant or attend as a committee member or a technical advisor.

I shall maintain strict security and confidentiality regarding the process or decisions regarding any protest or appeal that I am a participant, advisor or decision maker.

Whether recommending or selecting a vendor that will provide materials, services or construction to the State, approving a procurement or an evaluation tool or soliciting quotes greater than ten thousand dollars for the provision of materials, services or construction, I shall maintain strict security and confidentiality regarding the process and decisions to ensure fair competition.

Upon termination of my employment with the State, for any reason, these provisions and statements remain in effect until such time as the solicitation has been successfully awarded by the State, or the State provides me a written release. These provisions and statements apply if I accept employment with any entity, its affiliates, subcontractors, or business partners that may submit an offer or are included in an offer to this solicitation. I shall not accept an offer of employment from or have employment discussions with any person or entity lobbying for or potentially responding to a solicitation for one year following the delivery of purchased materials or the purchase of services or construction begins.

I understand that if I knowingly violate the terms of this Agreement, I will be subject to suspension for not less than ninety days or dismissal from State service.

The Undersigned has read and understands the above and agrees to be bound by the statements, rules and principles represented herein and in accordance with the provisions of the State Statutes and Rules regarding personnel, conflict of interest, confidentiality and procurement.

Please check the box below if applicable:

Yes No I am an architect or an engineer registered pursuant to section 32-121

Yes No I am a State employee who was employed within the past year by a person or firm responding to a solicitation, pursuant to section 41-2517(E)

Fiona Donohoe

Signature

Date

Name (Print)

Agency

Title

Phone



ARIZONA DEPARTMENT OF ADMINISTRATION
STATE PROCUREMENT OFFICE

PROCUREMENT DISCLOSURE STATEMENT

(Solicitation # BPM003645)

*Community Education and Information (Support and
Consultation on TBI & SCI)*

Dear Employee:

You have been selected to participate in the particular procurement activity as referenced above. Your selection was based on your technical knowledge and expertise in this area. Your regular job duties may not include procurement activities but for the purpose of this process you may play a significant procurement role in one or more of the following: participating in the development of a procurement as defined in ARS § 41-2503; participating in the development of an evaluation tool; approving a procurement as defined in ARS § 41-2503 or an evaluation tool; serving as a technical advisor or an evaluator who evaluates a procurement as defined in ARS § 41-2503; or recommending or selecting a vendor that will provide materials, services or construction to this state.

It is essential that the integrity of the procurement process be maintained to ensure that each Offeror is given fair and equal consideration. Your familiarity with particular brands, types of equipment, material, services, individuals or firms may tend to influence your evaluation; however, you are required in this specific instance to be particularly objective and guard against any tendency that might slant your evaluation in favor of a personal preference.

You are required to report to the Procurement Officer, or person facilitating the above referenced procurement process, any actual or potential conflict of interest as defined in A.R.S. § 38-503, § 41-2616C, § 41-753 and § 41-2517. You are also subject to the Code of Ethics set forth in Section R2-5A-501 of the Arizona Department of Administration, Personnel Division, Administrative Rules and Regulations.

An additional consideration is the legal mandate to maintain strict security and confidentiality regarding the content of any proposal, as well as the proceedings of the Evaluation Committee meetings during the evaluation process. Once the evaluation process has started, it is essential that any contact with Offerors, other than that disclosed, be through, and by, the Procurement Officer or person facilitating the above referenced procurement.

In addition, the Employee shall not have any communication related in any way to the particular procurement, except during formal Committee meetings, with any Offeror or potential subcontractor to that Offeror prior to award, nor shall that Member discuss the proposal or their evaluation with anyone other than the Procurement Officer, or person facilitating the above referenced procurement and Evaluation Committee Members. This is mandatory.

A person who holds a Significant Procurement Role as defined by ARS § 41-741 and § 41-2503 for a particular procurement shall sign a statement before starting any participation that the person has no financial interest in the procurement other than that disclosed and will have no contact with any representative of a competing Offeror related to the particular procurement during the course of evaluation of proposals, except those contacts specifically authorized by sections ARS § 41-2534, § 41-2537, § 41-2538 and § 41-2578. The person shall disclose on this statement any contact unrelated to the pending procurement that the person may need to have with a representative of a competing offeror and any contact with a representative of a competing offeror during evaluation of proposals except those contacts specifically authorized by sections ARS § 41-2534, § 41-2537, § 41-2538 and § 41-2578. A person who has been identified as having a significant procurement role for this procurement and fails to disclose contact with a representative of a competing offeror or who fails to provide accurate information on this statement is subject to civil penalty of at least one thousand dollars but not more than ten thousand dollars.

PROCUREMENT DISCLOSURE STATEMENT

As mandated by A.R.S. § 38-503, I, Lynda D. kosnik, have listed on this form all ownerships, employments, public and private affiliations and relationships held by me and/or a relative¹ which may have a substantial (pecuniary² and proprietary³) interest as defined in A.R.S. § 38-502 (11) in any contract, sale, purchase or service involving the agency. I understand that as my interests or those of my relatives change, I may need to modify this statement.

The substantial interests, both pecuniary and proprietary, held by me and/or a relative which may involve the State include (attach additional sheets as necessary):

During the course of my regular business, I may have contact, unrelated to this procurement, with the Offerors listed below, who have submitted proposals in response to this solicitation (attach additional sheets as necessary):

¹“Relative” means my spouse, child, child’s child, parent, grandparent, brother or sister (of the whole or half-blood) and their spouses and the parent, brother, sister or child of my spouse.

²“Pecuniary” means money or economic or other benefits that can be valued in monetary terms

³“Proprietary” means ownership or rights by virtue of ownership, whether public or private.

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Statements

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I have not and will not communicate with any potential Offeror or vendor in preparation of specifications/scopes of work, evaluation tool or other confidential information related to the above referenced Solicitation which would provide an unfair advantage or to prepare specifications/scopes of work which favor particular vendor(s).

I have not and will not provide insight, confidential information or assistance to any potential Offeror or vendor that might give an unfair advantage or inhibit fair competition for the above referenced Solicitation. My input regarding the development of the Solicitation documents, if any, has been and will be based solely on the State’s requirements. I have not and will not communicate those requirements or confidential information to any potential Offeror or vendor.

PROCUREMENT DISCLOSURE STATEMENT

I know of no conflict of interest on my part nor shall I take any action (e.g., commit an indiscretion or accept any gratuities or favors) that would compromise my impartiality or my responsibilities. Should a conflict of interest become known to me relevant to my role, I shall immediately disclose such conflict of interest.

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The Undersigned has read and understands the above and agrees to be bound by the statements, rules and principles represented herein and in accordance with the provisions of the State Statutes and Rules regarding personnel, conflict of interest, confidentiality and procurement.

Please check the box below if applicable:

Yes No I am an architect or an engineer registered pursuant to section 32-121

Yes No I am a State employee who was employed within the past year by a person or firm responding to a solicitation, pursuant to section 41-2517(E)

Lynda D. kosnik

Signature

Lynda Kosnik

Name (Print)

Employment Initiative Coordinator

Title

7.14.21

Date

AZRSA

Agency

602.542.3795

Phone