



**Request for Qualifications**  
 Solicitation No.  
**ADSP018-00007887**  
 Description:  
**2018 Professional Services List**

Arizona Department of  
 Administration  
**State Procurement Office**  
 100 N 15th Ave., Suite 201  
 Phoenix, AZ 85007

**Offer Forms**  
**(Attachments)**

Date: **January 8, 2018**

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Attachment 1  
**Offer and Acceptance Form**

**SUBMISSION OF OFFER:** Undersigned hereby offers and agrees to provide qualifications for **2018 Annual Professional Services List** in compliance with the Solicitation indicated above and our Offer indicated by the latest dated version below:

Initial Offer:	1.	<b>01/22/2018</b>	<i>mmc</i>	
		date	initial	

**Errol L. Montgomery & Associates, Inc.**

Offeror company name

1550 E. Prince Rd.

Address

Tucson, AZ 85719

City | State | ZIP

74-2458455

Federal tax identifier (EIN or SSN)

*Mark Cross* *mmc*  
Signature of person authorized to sign Offer Initials

Mark Cross, President

Printed name and title

Juliet McKenna, Principal

Contact name and title

[jmckenna@elmontgomery.com](mailto:jmckenna@elmontgomery.com) 520-881-4912

Contact Email Address Contact phone number

**CERTIFICATION:** By signature in the above, Offeror certifies that it:

- will not discriminate against any employee or applicant for employment in violation of Federal Executive Order 11246, [Arizona] State Executive Order 2009-9 or A.R.S. §§ 41-1461 through 1465;
- has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer. Failure to provide a valid signature affirming the stipulations required by this clause will result in rejection of the Offer. Signing the Offer with a false statement will void the Offer, any resulting contract, and may be subject to legal penalties under law;
- complies with A.R.S. § 41-3532 when offering electronics or information technology products, services, or maintenance; and
- is not debarred from, or otherwise prohibited from participating in any contract awarded by federal, state, or local government.

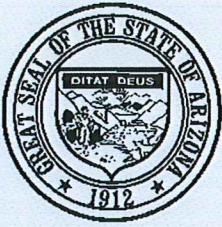
**ACCEPTANCE OF OFFER:** State hereby accepts the initial Offer, Revised Offer, or Best and Final Offer identified by number **ADSP018-00007887** at the top of this form, and which was dated 1/22/18 (the Accepted Offer). Offeror is now bound (as Contractor) to carry out the Work under the attached Contract, of which the Accepted Offer forms a part. Contractor is cautioned not to commence any billable work or to provide any material or perform any service under the Contract until Contractor receives the applicable Order or written notice to proceed from Procurement Officer.

State's Contract No. is: **ADSP018-00007887** The effective date of the Contract: 1/30/18-1/30/18 Contract awarded: 1/30/18

*Sean Wulfekuhle*  
Procurement Officer signature

Sean Wulfekuhle  
Procurement Officer printed name

Contract qualification award can be viewed at <https://spo.az.gov/procurement-services/professional-services>



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**Attachment 2-A**  
**Experience and Capacity**

STATE MAY DETERMINE YOUR SUBMITTAL IS NON-RESPONSIVE IF YOU DO NOT ANSWER ALL QUESTIONS FULLY.

**DEFINITIONS**

**Branch Office:** A geographically distinct place of business or subsidiary office of a firm that has a key role on the team.

**Discipline:** Primary technical capabilities of key personnel, as evidenced by academic degree, professional registration, certification, and/or extensive experience.

**Key Personnel:** Individuals who will have major contract responsibilities and/or provide unusual or unique expertise.

**Parent Company.** Identify controlling company name in this field if the Firm is owned or controlled by another company.

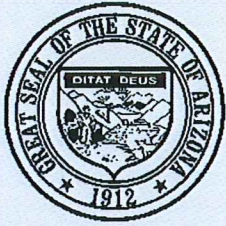
**Structure:** How a business is organized to accomplish its objectives (ie, Sole Proprietor, Limited Liability Company, Cooperative, Corporation, Partnership, S Corporation). [See chart below for example:](#)

Entity Type	Structure
Corporation	S Corporation or C Corporation, or Professional Corporation
Cooperative	Cooperative
Partnership	General Partnership, Limited Partnership, Limited Liability Partnership, Limited Liability Limited Partnership
Sole Proprietor	Sole Proprietor
Limited Liability Company	Limited Liability Company or Professional Limited Liability Company

**1.0 Five (5) Example Projects**

List no more than five (5) example projects which best illustrate firm's qualification for this contract in the chart provided below. Select projects where multiple team members worked together, if possible, that demonstrate the team's capability to perform work similar to that required for this qualifications list contract. **(NOTE: The integrity of the chart table columns shall remain unchanged, however the rows for each project may be expanded by the Offeror to accommodate the information).**

- Title and Locations of project or contract. For an indefinite delivery contract, the location is the geographic scope of the contract.
- Enter the year completed of the professional services (such as planning, engineering study, or design), and/or the year completed if construction. If any of the professional services or the construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description of Project and Relevance to This Contract (block f).
- Project Owner or user, such as a government agency or installation, an institution, a corporation or private individual.
- Provide the original budget or not to exceed dollar amount for the project.
- Provide the Total Cost of the Project. If any of the professional services or construction projects is not complete, indicate the percentage complete and whether this project will be on budget, over or under budget.
- Brief Description: Indicate scope, size, and length of project, principle elements and special features of the project. Discuss the relevance of the example project to this contract.



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Title and Location of Project	Design Completion Year	Construction Completion Year	Project Owner	Project Original Budget (or not to exceed amount)	Total Cost of the Project	Brief Description of Project
North Indian Bend Wash Superfund Site; Scottsdale, AZ	Ongoing since 198	N/A	Motorola Solutions, Inc.	Not applicable; Multiple ongoing contracts since 1983	\$2,295,779 From Jan 2015 to Dec 2017; on budget	M&A has provided hydrogeologic investigation, remediation, and strategic management services for this project. We characterized the distribution, magnitude, and movement of VOCs in a deep, multi-layer, alluvial groundwater basin; identified potential source areas; developed capture / containment approaches for the groundwater remedy; designed and oversaw the construction and testing of monitoring and extraction wells; supported the development of a groundwater flow and solute-transport model and used it to evaluate contaminant movement, assess plume containment under a range of extraction regimes applied a particle-tracking approach to assess remedy performance and demonstrate compliance as part of two 5-Year Reviews; designed and implemented long-term monitoring programs and evaluated data to verify plume containment.
Residential Water Demand Study — Pima & Maricopa Counties, AZ	2015	N/A	Pima / Maricopa Water Providers	\$94,000	\$94,000	M&A forecasted changes in residential demand and evaluated the principal causes / likely extent of declines observed in recent decades. We investigated the factors that underlie declining water demand; compiled data on critical components of indoor and outdoor use; researched penetration and water use rates for various household fixtures; used Google Earth imagery to inventory turf and swimming pools and assess the frequency of pool removals; evaluated projected

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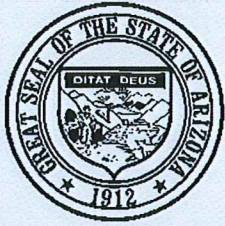
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						demographics and assessed the impacts on various components of per-household water demand; developed dynamic simulation models to forecast the rates of change in per-household water demand and support provider-driven scenario testing; and provided guidance for developing and assessing the impact of conservation programs.
Liberty Aquifer Replenishment Facility; Goodyear, AZ	Ongoing since 2010	N/A	Liberty Water Utilities	Not applicable; Multiple ongoing contracts	\$206,370 From Jan 2015 to Dec 2017; on budget	M&A provided support for Arizona's first public-private effluent recharge facility. The permitting process presented challenges because the areas surrounding the site featured uses that could potentially cause unreasonable harm. We needed to project groundwater level rise and thoroughly address issues associated with a waterlogged area, landfill, sand and gravel pits, existing recharge facilities, known environmental sites, and an Air Force base, among others. M&A overcame the challenges associated with designing and permitting this facility through close coordination with regulators and stakeholders. Currently in early stages of operation, the LARF is expected to recharge at least 78B gallons of water and store up to 6,000 AF/yr of Class A+ treated municipal effluent in an area of extensive historical groundwater depletion.
Cochise Conservation and Recharge Network, Cochise County, AZ	Ongoing since 2015	N/A	The Nature Conservancy	\$115,793	\$115,793 From Jan 2015 to Dec 2017; on budget	M&A provides technical and logistical support to a multi-participant organization that is implementing projects that will support the San Pedro River. Projects are designed to recharge water underground and support groundwater levels that sustain the river. Economic benefits are realized to the communities by ensuring sustainability of the river and protection of endangered species.

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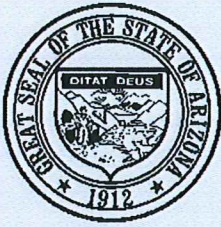
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Permitting Support for the Closure of Deep CO2 Wells, Apache County	2016	N/A	Kinder Morgan	\$150,184	\$127,052 From Jan 2015 to Dec 2017; under budget	M&A provided services to obtain the required APP for clean closure of deep CO2 recovery test wells. Our services included: Analyzing hydrogeologic and water quality data to assess the requirements of test well closure and disposal well permitting; Developing Aquifer Water Quality Standard (AWQS) demonstrations at designated points of compliance (POCs); Developing analyses to support the definition of the pollutant management area and the discharge impact area; Preparing closure and post-closure plans, along with a hydrogeologic study and other components of the permit application; Responding to regulatory requests for additional information; Developing successful technical analyses and demonstrating aquifer isolation that led to a waiver for POC monitoring
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Attachment 2-A  
**Experience and Capacity**

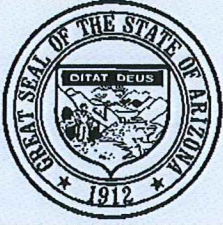
STATE MAY DETERMINE YOUR SUBMITTAL IS NON-RESPONSIVE IF YOU DO NOT ANSWER ALL QUESTIONS FULLY.

**2.0 EMPLOYEES BY DISCIPLINE**

Aeronautical Engineer	Electrical Engineer	Mechanical Engineer
Agricultural Engineer	Environmental Engineer	Metallurgical Engineer
Archeologist	Environmental Scientist	Mining Engineer
Architect	Fire Protection Engineer	Nuclear Engineer
Architectural Engineering	Geodetic Surveyor	Petroleum Engineer
Biologist	Geographic Information System Specialist	Photogrammetrist
CADD Technician	Geological Engineer	Project Manager
Chemical Engineer	Geologist	Sanitary Engineer
Civil Engineer	Hydrographic Surveyor	Soils Engineer
Construction Manager	Hydraulic Engineer	Structural Engineer
Construction Inspector	Hydrologist	Technician/Analyst
Control Systems Engineer	Industrial Engineer	Transportation Engineer
Cost Engineer/Estimator	Landscape Architect	Water Resources Engineer

Enter requested information in the chart provided below:

- a. Select disciplines from the List of Disciplines. For employees that do not qualify for any of the disciplines, select "Other".
- b. Each person can be counted only twice; once for his/her primary function and once for his/her secondary function. Primary and secondary functions should be indicated by including a "P" or an "S" in column b after the Description Title is given.
- c-d. If the form is completed for a firm (including all branch offices), enter the number of employees by disciplines in column c. If the form is completed for a branch office, enter the number of employees by discipline in column d and for the firm in column c. (NOTE: The Offeror may insert or delete rows in the existing Employees by Discipline chart table on page six (6) as necessary to complete the requirements for Question 2).



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**EXAMPLE:**

a. Discipline Title	b. Function: Primary (P) or Secondary (S)	c. No. of Employees Firm	d. No. of Employees Branch
Example: Architect	P	138	50-Yuma Branch 50-Tempe Branch 38 – Phoenix Branch
Example: Architect	S	20	5-Yuma Branch 5-Tempe Branch 5 – Phoenix Branch 5- Tucson Branch
a. Discipline Title	b. Function: Primary (P) or Secondary (S)	c. No. of Employees Firm	d. No. of Employees Branch
Geologist	P	10	8-Tucson 2-Phoenix
Hydrologist	P	14	14-Tucson
Environmental Scientist	S	1	1-Tucson
<b>Total</b>		25	25

### 3.0 FIRMS EXPERIENCE AND REVENUE

- a. Firm shall complete the document titled "Project Experience Number of Projects and Revenue", using same document title and upload in .pdf format only as an "Attachment" with firm's offer in ProcureAZ.

### 4.0 FIRMS SERVICES

- a. Firm shall complete the Excel spreadsheet titled "2018 Professional Services List of Firms Services" using same document title and uploaded in Excel format only as an "Attachment" with firm's offer in ProcureAZ.

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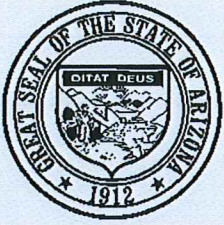
**5.0 EXPERIENCE REFERENCES:**

THE PRIME FIRM SHALL LIST A TOTAL OF THREE (3) CLIENT REFERENCES FOR ANY PROJECTS COMPLETED IN THE LAST YEAR BY THE FIRM (OR A BRANCH LOCATION). REFERENCES MAY BE CONTACTED BY ANY ELIGIBLE AGENCY.

1	Client Company/Address	Contact	Begin Date	End Date
	<b>Tucson Water, Director's Office</b> <b>310 W. Alameda Street, Tucson, AZ</b> <b>85726-7210</b>	<b>Candice Rupprecht, Water</b> <b>Conservation Specialist</b>	<b>2015</b>	<b>ongoing</b>
	Phone Number	Email Address		
	<b>520-837-2181</b>	<b>Candice.Rupprecht@tucsonaz.gov</b>		
List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities (What were the uses, facilities, or activities that were built. For example; lift station, parking lot, bridge, playground, sewerage treatment plant, storm drainage, etc.).				
<b>Effectiveness of Rainwater Harvesting Rebates, Tucson (Pima County), AZ. The original contract was for \$116,759. the cost over the past 3 years totaled \$116,759 with no budget overages.</b>				
Services performed similar to those described in Solicitation				
<b>Geologist services (Water Resources; Hydrology; Environmental Assessment). M&amp;A is assisting Tucson Water's Conservation Office in evaluating its rainwater harvesting rebate program by estimating impacts on potable demand. A parallel project involves developing and deploying a cost-effective, reliable way to monitor inflows, outflows, overflows, and leaks from a sample of rebate-supported rainwater harvesting cisterns to determine if systems are properly sized and to assess how they are being used.</b>				
2	Client Company/Address	Contact	Begin Date	End Date
	<b>Liberty Utilities, 12725 W. Indian School</b> <b>Road, Suite D101, Avondale, AZ 85392</b>	<b>Matthew Garlick</b>	<b>2010</b>	<b>ongoing</b>
	Phone Number	Email Address		
	<b>(623) 298-3763</b>	<b>(623) 298-3763</b>		
List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities (What were the uses, facilities, or activities that were built. For example; lift station, parking lot, bridge, playground, sewerage treatment plant, storm drainage, etc.).				
<b>Liberty Aquifer Replenishment Facility, Goodyear (Maricopa County) AZ. The original contract was negotiated with the option for numerous amendments (which were exercised) because of an evolving scope and a extremely aggressive deadline; the cost over the past 3 years totaled \$206,370, with no budget overages.</b>				
Services performed similar to those described in Solicitation				
<b>Geologist services (Water Resources; Hydrology; Ground Water; Water Well Work, Environmental Assessment). M&amp;A has provided many services related to the design, design, and permitting of this recharge facility, including groundwater modeling and analyses to evaluate the potential for unreasonable harm due to nearby contaminant sources.</b>				

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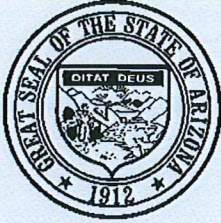


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3	Client Company/Address	Contact	Begin Date	End Date
	<b>Motorola Solutions, Inc., 2900 South Diablo Way, Building A, Suite 150, Tempe, AZ 85282</b>	<b>Terry Lockwood</b>	<b>1985</b>	<b>ongoing</b>
	Phone Number	Email Address		
	<b>(602) 760-4763</b>	<b>Terry.Lockwood@motorolasolutions.com</b>		
<p>List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities (What were the uses, facilities, or activities that were built. For example; lift station, parking lot, bridge, playground, sewerage treatment plant, storm drainage, etc.).</p>				
<p><b>North Indian Bend Wash Superfund site, Scottsdale (Maricopa County), AZ. Multiple ongoing contracts that have totaled nearly \$2,300,00 over the past 3 years. We have worked with Ms. Lockwood for over 15 years.</b></p>				
<p>Services performed similar to those described in Solicitation</p>				
<p><b>Geologist services (Water Resources; Hydrology; Ground Water; Water Well Work; Environmental Assessment). M&amp;A has provided many services related to groundwater remediation activities at this Superfund site over the past 30+ years, including source identification and delineation, remedy evaluation and selection, preparation a 5-Year Review, monitoring, reporting, and extensive groundwater flow and transport modeling.</b></p>				

End of Attachment 2-A



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**Attachment 2-B  
Organization Profile**

STATE MAY DETERMINE YOUR PROPOSAL IS NON-RESPONSIVE IF YOU DO NOT ANSWER ALL QUESTIONS FULLY.

**ORGANIZATION PROFILE**

The firm shall complete a separate Organizational Profile document for each branch office.

<b>Firm Name</b>	Errol L. Montgomery & Associates		<b>Year established</b>	1984
<b>Principal address (street, city, state)</b>	1550 E Prince Road, Tucson, AZ 85719			
<b>Entity type:</b>	Corporation	<b>Structure:</b>	C Corporation	
<b>Branch or Division:</b>	N/A	<b>Parent Company:</b>	N/A	
<b>Years the organization has conducted business in Arizona.</b>			34	
<b>Contract Representatives to Contact</b>				
	<b>Name</b>	<b>Title</b>	<b>Telephone Number</b>	<b>E-Mail Address</b>
1.	Mark Cross	President	520-881-4912	mcross@elmontgomery.com
2.	Juliet McKenna	Principal	520-881-4912	jmckenna@elmontgomery.com
<b>Firm Professional Registration and Certifications (INCLUDE COPY OF DOCUMENT IN OFFER)</b>				
	<b>Description</b>	<b>Issuer</b>	<b>Number</b>	<b>Expiration</b>
1.	Arizona Corporation Commission Registration <i>Certificate of Good Standing attached in offer</i>	State of Arizona	05111009	10/11/18 – Renewed annually
2.	Arizona Board of Technical Registration <i>Copy of registration attached in offer</i>	State of Arizona	10223-0	05/31/18 – Renewed annually

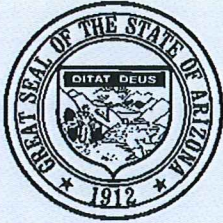
**ATTACHMENT 2-B SUPPLEMENTS:**

(For submission of additional Organizational Profile qualifications beyond the number of forms provided in the Offer Documents: Offeror shall copy the Organizational Profile form in its entirety and complete in a separate Document for submission with the offer or type "None" on first line if not applicable. Offeror shall title Supplement(s) with the same beginning title as named herein, number sequentially in accordance with the number of Organizational Profile forms submitting and upload with offer.)

**End of Attachment 2-B**

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Attachment 3-A  
**Method Proposal**  
(Method of Approach)

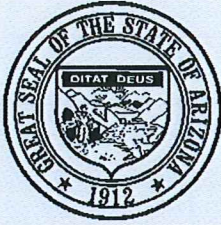
**RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST**

End of Attachment 3-A

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Available online at: [Procure.AZ.gov](http://Procure.AZ.gov)



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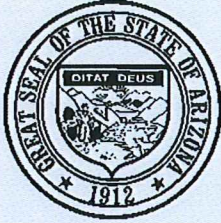
Attachment 3-B  
**Key Personnel Proposal**

Answer all questions thoroughly in the spaces provided. **Complete this form in full for each one of the key personnel who will participate in this contract.** Insert or attach a separate resume if desired, but any attached resumes are supplemental to this form and **do not substitute resumes for this form.** Offeror shall list any resume filename within the Key Personnel Form resume section **and Attach as titled and submit with firm's offer in ProcureAZ. Resumes shall not be listed in Attachment 3-B as Supplements.**

<b>1</b>	<b>Name:</b>	<b>Mark Cross</b>	How long with company?	<b>29 years</b>
	Current position in company:	<b>President, Hydrogeologist</b>	How long in position?	<b>29 years</b>
	Position for the Services:	<b>Technical Oversight</b>	How much of time will be dedicated to the Services?	<b>5 %</b>
	What primary functions will be assigned?	<b>Technical oversight for managed aquifer recharge and water supply projects</b>		
	Describe person's experience in performing services like those that are to be assigned:	<p><b>Mr. Cross has 38 years of experience in the following areas:</b>          Design / implementation of studies for recharge feasibility assessments          Technical support for recharge permit applications (USF, APP)          Design of technical evaluations for water supply projects          Development of groundwater flow and chemical transport models          Design / testing of production, injection, monitoring, and dewatering wells  <b>Representative projects:</b>  <u>Feasibility Studies • Recycled Water Program • Tucson Water Department:</u> Led feasibility investigations and groundwater flow modeling to develop a conceptual design for recharge and recovery facilities that will facilitate the indirect potable reuse of recycled water  <u>Alternative Infrastructure Assessment • Tucson Area • Tucson Water Department:</u> Managed technical analyses of feasibility and costs for increasing production capacity to meet demands for potable water during temporary disruptions of supply from the Clearwater Renewable Resource Facility  <u>Phase 1 &amp; 2 Effluent Recharge Design &amp; Permitting • Liberty Aquifer Recharge Facility • Liberty Utilities:</u> Provided technical oversight and support for the identification, screening, and ranking of candidate sites for recharging treated effluent by surface infiltration and injection; oversaw the design of effluent recharge facilities and the acquisition of a USF permit and an APP  <u>Facility Design, Permit Support, &amp; Recovery Planning • Tonopah Desert Recharge Project • Central Arizona Water Conservation District:</u> Planned, managed, and provided technical oversight for hydrogeologic characterization studies, groundwater flow modeling, and technical reporting; led investigations to support a detailed design of recovery and treatment facilities, including a groundwater flow model, a preliminary design for a recovery wellfield, and estimates for capital and operating costs to recover and treat water</p>		

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List person's job-related training and education:	<b>Education:</b> B.S., Geology, Northern Arizona University (1979); M.S., Hydrology, University of Arizona (1983) <b>Professional Registrations:</b> Registered Professional Geologist #19193, AZ; Registered Professional Geologist #4471, CA; Professional Hydrogeologist #249, CA
<b>Resume:</b>	Available upon request

<b>2</b>	<b>Name:</b>	<b>Juliet McKenna</b>	How long with company?	<b>11 years</b>
	Current position in company:	Principal, Hydrogeologist, Water Planning Consultant	How long in position?	<b>11 years</b>
	Position for the Services:	<b>Project manager / task lead</b>	How much of time will be dedicated to the Services?	<b>15-30 %</b>
	What primary functions will be assigned?	Manage projects and lead tasks for water resource planning and hydrogeological characterization projects		
	Describe person's experience in performing services like those that are to be assigned:	<p><b>Ms. McKenna has 23 years of experience in the following areas:</b>            Water resources portfolio planning and management            Arizona and Colorado River water policy            Facilitation of multiparticipant water management groups and agreements            Public outreach and communication of strategies to general audiences            Groundwater investigations and water supply development            State and federal water laws and regulations</p> <p><b>Representative projects:</b>  <u>Water Supply Reliability Analysis • Proposed Indian Water Rights Settlement• Hualapai Tribe:</u> Analyzed the reliability of various types of Colorado River water supplies (including Priorities 1–4 and CAP supplies) in the context of the current shortage sharing plan and proposed Drought Contingency Plan; compared these to long-term demand projections and noted steps to improve reliability  <u>Water Supply Acquisition Study • Statewide • Central Arizona Groundwater Replenishment District:</u> Researched / evaluated over 400 potentially available statewide water sources (Colorado River, effluent, and groundwater rights) and helped design a proprietary database as part of a statewide effort to acquire longterm water supplies  <u>Well Inventory &amp; Capital Improvement Plan • Agricultural Lands • Maricopa-Stanfield Irrigation &amp; Drainage District:</u> Worked with an engineering firm and the client to inventory 400+ wells and develop a phased, cost-effective approach for increasing groundwater production capacity in response to cuts in deliveries of CAP (Colorado River) water  <u>Water Resource Planning • Pinal County Water Element Task Force • WestLand Resources, Inc. / Pinal County:</u> Facilitated a citizen's task force to develop recommendations for amending the water element of a comprehensive plan; conducted workshops with the Planning &amp; Zoning Commission and Board of Supervisors; prepared an inventory of renewable water supply resources</p>		

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List person's job-related training and education:	<b>Education:</b> B.S., Geology, Boston College ; M.S., Geology, University of Washington <b>Professional Registrations:</b> Registered Professional Geologist #46377, AZ; Registered Professional Geologist #6856, CA; Registered Professional Geologist #992, ID; Registered Professional Geologist #2435, WA; Registered Professional Hydrogeologist #2435, WA
Resume:	Available on request



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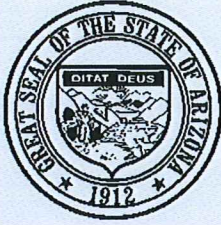
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<b>3</b>	<b>Name:</b>	<b>Hale Barter</b>	How long with company?	<b>24 years</b>
	Current position in company:	<b>Principal, Hydrologist</b>	How long in position?	<b>24 years</b>
	Position for the Services:	<b>Project management and technical oversight</b>	How much of time will be dedicated to the Services?	<b>10 %</b>
	What primary functions will be assigned?	<b>Technical lead for environmental and managed aquifer recharge projects requiring hydrologic modeling</b>		
	Describe person's experience in performing services like those that are to be assigned:	<p><b>Mr. Barter has 31 years of experience in the following areas:</b>            Project management and technical oversight            Groundwater modeling for mining, municipal, and industrial clients            Analysis of aquifer hydraulic and water quality data            Technical investigations for mine EIS and APP permitting            Design and supervision of aquifer testing and monitoring programs  <b>Representative projects:</b>  <u>Permit Support • Tres Rios del Norte Recharge Project • City of Tucson:</u> Conducted groundwater flow and particle path modeling to support permitting for a managed effluent recharge facility along the Santa Cruz River; evaluated alternatives for future recharge projects (managed and constructed) and for riparian habitat enhancements supported by effluent  <u>Alternatives Analysis • El Rio Medio Recharge Project • City of Tucson &amp; U.S. Army Corp of Engineers:</u> Developed a numerical groundwater model to evaluate alternatives for future effluent recharge projects and riparian habitat enhancements along the Santa Cruz River  <u>Permit Support • Upper Agua Fria Recharge Project • Town of Prescott Valley:</u> Characterized hydrogeologic conditions, modeled groundwater flow, and prepared a monitoring plan and permit applications for an effluent recharge facility (managed and constructed) along the upper Agua Fria River  <u>Remediation &amp; Risk Assessment • U.S. Air Force Plant 44, Tucson Airport Area Superfund Site • Raytheon Company:</u> Led groundwater flow, particle-path, and solute-transport modeling to simulate TCE and 1,4-dioxane migration and containment, to optimize the pump-and-treat remediation system, and to estimate future exposure-point concentrations for risk assessment  <u>Hydraulic Continuity Analysis • San Pedro Basin • Polsinelli Shughart PC:</u> Led a technical team in the development of a numerical groundwater flow model to simulate the interaction between a shallow, alluvial aquifer that is hydraulically connected to a perennial stream system and a deeper, artesian aquifer that supplies industrial and municipal water</p>		
	List person's job-related training and education:	<p><b>Education:</b> B.S., Hydrology, University of Arizona (1988) ; M.S., Hydrology, University of Arizona (1995)  <b>Modeling Codes:</b> MODFLOW, MODFLOW-SURFACT, SWIFT, MT3D, UNSATII, MODXX, PATH3D, MODPATH, plus various analytical codes</p>		
	<b>Resume:</b>	<b>Available on request</b>		

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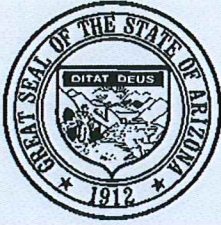
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<b>4</b>	<b>Name:</b>	<b>Leslie Katz</b>	How long with company?	<b>29 years</b>
	Current position in company:	<b>Principal, Hydrogeologist</b>	How long in position?	<b>29 years</b>
	Position for the Services:	<b>Project management, technical oversight</b>	How much of time will be dedicated to the Services?	<b>10-20%</b>
	What primary functions will be assigned?	<b>Project management, technical oversight for environmental, water supply, and hydrogeologic characterization projects</b>		
	Describe person's experience in performing services like those that are to be assigned:	<p><b>Ms. Katz has 38 years of experience in the following areas:</b>            Management of environmental and water supply projects            Litigation support for water resources and environmental disputes            Design and management of groundwater monitoring programs            Technical support to acquire and comply with state and federal permits            Design of field investigations to characterize subsurface contamination            Evaluation of remedial alternatives and oversight of remedy implementation  <b>Representative projects:</b>  <u>Remedial Investigations • North Indian Bend Wash (NIBW) Superfund Site • Motorola Solutions:</u> Managed and provided long-term technical leadership, from the initial characterization of VOC contamination through the final remedy design and implementation; coordinated and analyzed data from various fluid movement, depth-specific sampling, and zonal testing programs to characterize conditions in a deep alluvial aquifer  <u>Wellfield Evaluation &amp; Modeling • Cholla Power Plant • Arizona Public Service:</u> Managed a program that entailed evaluating monitoring data (water level / water quality) and incorporating it into a groundwater flow model that will be used to optimize industrial wellfield pumping to minimize drawdown impacts  <u>APP/UIC Permit Support for Deep Stimulation Wells • St. Johns CO2 Source Field Project • Kinder Morgan:</u> Analyzed hydrogeologic / water quality data to address the requirements of stimulation well closure and disposal well permitting; demonstrated compliance with Aquifer Water Quality Standards; developed an analysis to identify Pollutant Management and Discharge Impact Areas; developed closure and post-closure plans; prepared a hydrogeologic study and other components of the permit application; responded to requests from the State for additional information  <u>Industrial Wellfield Conversion • Former San Manuel Mine • BHP Copper:</u> As part of a site closure process, managed a large-scale field program to install new production wells and abandon old ones with the goal of creating a sustainable, high quality water supply for future municipal and industrial uses; implemented interval-specific testing to identify zones with poor water quality and monitoring to evaluate surface water / groundwater interactions</p>		
	List person's job-related training and education:	<p><b>Education:</b> B.S., Geology, University of Arizona (1983); M.S., Hydrology, University of Arizona (1987)  <b>Professional Registrations:</b> Registered Professional Geologist #28245, AZ</p>		
	<b>Resume:</b>	<b>Available on request</b>		

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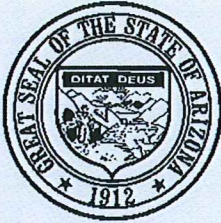
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<b>5</b>	<b>Name:</b>	Gary Woodard	How long with company?	5 years
	Current position in company:	Senior water policy / economics consultant	How long in position?	5 years
	Position for the Services:	Task lead / task support	How much of time will be dedicated to the Services?	10-20%
	What primary functions will be assigned?	Technical support for water demand / conservation / water resource / scenario planning services		
	Describe person's experience in performing services like those that are to be assigned:	<p><b>Mr. Woodard has 36 years of experience in the following areas:</b>  Municipal water demand modeling / forecasting  Conservation evaluation and design  Demand-management strategy and municipal water rate structure design  Water right, storage credit, infrastructure, irrigation system, and water company valuation  Evaluation of the economic and social impacts of water loss on rural communities  Evaluation of water quality impacts on end users  <b>Representative projects:</b>  <u>Water Demand Forecasting • Pima &amp; Maricopa Counties • Consortium of Water Providers &amp; Regulators:</u> Examined factors of long-term declines in residential water demand; investigated triggers of water-conserving behavior in existing homes and trends in water efficiency in new homes; designed and supervised the construction of dynamic simulation models  <u>Demand Management • Tucson Water Service Area • Tucson Water:</u> Examined current and potential conservation measures, including a pilot study of water savings through bead-technology clothes washers; assessed the impacts of swimming pool removal and abandonment on water demand; developed systems to monitor the use of rainwater harvesting cisterns  <b>Water Demand Forecasting:</b> Developed long-range water-demand forecasts and conducted demand-management analyses for municipal water customers and land owners  <b>Water Conservation Analysis:</b> Evaluated water conservation measures and programs; drafted ordinances for the City of Tucson, ADWR, City of Surprise, and Pima County  <b>Surveys of Water Users:</b> Designed survey instruments; supervised data collection via mail, phone, or Internet; and performed statistical analyses on household-level surveys of water users to reveal demand patterns and trends for Tucson Water, Phoenix Water Department, and Metro Water District</p>		
	List person's job-related training and education:	<b>Education:</b> B.S., Chemistry, University of Michigan (1976); M.P.P., Public Policy, University of Michigan (1981); J.D., Law, University of Michigan (1981)		
	<b>Resume:</b>	Available on request		

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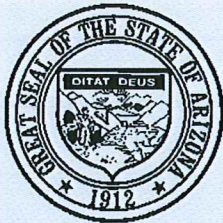
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<b>6</b>	<b>Name:</b>	<b>Dennis Hall</b>	How long with company?	<b>31 years</b>
	Current position in company:	<b>Principal Hydrogeologist</b>	How long in position?	<b>31 years</b>
	Position for the Services:	<b>Project manager, technical oversight</b>	How much of time will be dedicated to the Services?	<b>15-30%</b>
	What primary functions will be assigned?	<b>Project manager / technical oversight for environmental and water supply projects</b>		
	Describe person's experience in performing services like those that are to be assigned:	<p><b>Mr. Hall has 40 years of experience in the following areas:</b>            Groundwater resource evaluations            Regulatory support for permitting            Design, coordination, and supervision of well construction and testing            Project management for remedial investigations            Analysis of aquifer hydraulic data            Design and application of groundwater flow models            Analysis of geologic and geophysical data  <b>Representative projects:</b>  <u>Aquifer Protection Permit (APP) Support &amp; Monitoring • Solana Generating Station • Abengoa Solar:</u> Managed and provided technical oversight for hydrogeologic investigations associated with an APP for a 280 megawatt concentrating solar power plant; designed a monitoring network  <u>APP Support • Proposed Potash Mine • Confidential Client:</u> Characterized vertical changes in water quality and prepared a hydrologic report to support a preliminary economic assessment and an APP  <u>APP Support • Luke Salt Area • Southwest Solar Technologies:</u> Managed and provided senior technical oversight for hydrogeologic investigations in support of an APP for a proposed solar power plant that would use compressed air energy storage (CAES) technology in solution caverns to be developed in the Luke Salt body  <u>Water Supply Investigations • Adaman Irrigation Water &amp; Drainage District • Stantec Consulting Services:</u> Designed and provided technical oversight for the construction and testing of four high-capacity production wells to replace wells eliminated by the widening of State Route 303  <u>Characterization &amp; Impact Analysis • Proposed Mining Withdrawal EIS • SWCA Environmental Consultants / Bureau of Land Management:</u> Provided senior technical oversight for an evaluation of regional hydrogeologic conditions to project the potential of uranium mining on groundwater, springs, and soils on a million acres of federal land adjacent to Grand Canyon National Park</p>		
	List person's job-related training and education:	<p><b>Education:</b> B.S., Geology, Northern Arizona University (1978); B.S., Physics, Northern Arizona University (1978); M.S., Geosciences, University of Arizona (1991)  <b>Professional Registrations:</b> Registered Professional Geologist #23687, AZ; Registered Professional Geologist #4999, CA</p>		
	<b>Resume:</b>	<b>Available on request</b>		

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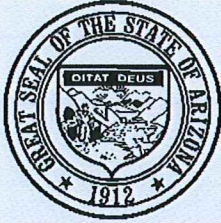
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<b>7</b>	<b>Name:</b>	<b>Jeffrey Meyer</b>	How long with company?	<b>30 years</b>
	Current position in company:	<b>Principal Hydrogeologist</b>	How long in position?	<b>30 years</b>
	Position for the Services:	<b>Project manager, technical / task lead</b>	How much of time will be dedicated to the Services?	<b>10-25%</b>
	What primary functions will be assigned?	<b>Project manager, technical / task lead for environmental and managed aquifer recharge projects requiring expertise in vadose zone hydrogeology</b>		
	Describe person's experience in performing services like those that are to be assigned:	<p><b>Mr. Meyer has 30 years of experience in the following areas:</b>          Recharge siting, feasibility, and impact assessments          Vadose zone and hydrogeologic characterization          Installation of monitoring wells and vadose zone piezometers          Contamination characterization          Design / construction of soil vapor wells and sampling systems          Evaluation and modeling of contaminant transport in the vadose zone</p> <p><b>Representative projects:</b>  <u>Feasibility Investigations &amp; Permitting • Liberty Aquifer Replenishment Facility • Liberty Utilities:</u> Led reconnaissance investigations to site the facility; conducted field investigations (drilling, trenching, and infiltration testing) to assess feasibility; assisted with the facility design; modeled groundwater flow and conducted an unreasonable harm assessment; prepared monitoring plans, applications, and documentation for regulatory permits; negotiated permit requirements for a site with nearby sensitive land and water uses  <u>Feasibility Investigations &amp; Permitting • Water Reclamation Facility Recharge Project • Town of Marana:</u> Designed and led hydrogeologic investigations (drilling, trenching, infiltration testing, and a geophysical survey) to assess recharge feasibility; prepared USF permit and APP applications, a hydrologic report, and monitoring and contingency plans; conducted including groundwater modeling and an unreasonable harm assessment  <u>Site Selection, Feasibility Assessments &amp; APP/USF Permitting • Upper Agua Fria Recharge Project • Town of Prescott Valley:</u> Conducted reconnaissance investigations for the siting and conceptual design of effluent recharge alternatives; characterized the lithologic conditions and infiltration capacity of near-surface soils; characterized hydrogeologic conditions in the vadose and saturated zones; oversaw groundwater flow modeling; coordinated floodplain hydraulic analyses and recharge facility design activities; prepared permit applications</p>		
	List person's job-related training and education:	<p><b>Education:</b> B.S., Agronomy / Soil Science, University of Illinois (1980); M.S., Soil Science/Land Reclamation, University of Illinois (1983); Ph.D. coursework, Soil Physics / Hydrology, University of Arizona</p>		
	<b>Resume:</b>	<b>Available on request</b>		



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**ATTACHMENT 3-B SUPPLEMENTS:**

(For submission of additional Key Personnel qualifications beyond the number of forms provided in the Offer Documents: Offeror shall copy the Key Personnel Form in its entirety and complete in a separate Word Document for submission with the offer, and list file name below or type "None" on first line if not applicable. Offeror shall title Supplement(s) with the same title as named herein and upload with offer.)

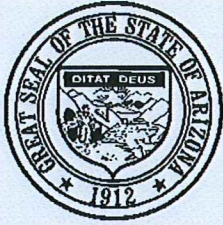
	Title	Document Date	No. of pages	Purpose in Offer
1.	None	x	x	

(NOTE: The Offeror may insert additional rows as required).

End of Attachment 3-B

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## Attachment 3-C Proposed Subcontractors

### RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST

Check "NO" if you WILL NOT subcontract any portion of the Work and will therefore be carrying out all of the Work with your own personnel.

NO, the Offeror will not subcontract any portion of the Work.

If you WILL subcontract any portion of the Work, check "YES" below and list name of persons or companies you propose to use as subconsultants.

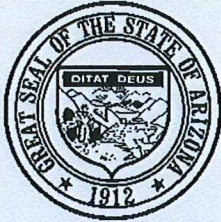
1. Fill in the information in the chart below for every proposed subcontractor – indicate the role and services work the subconsultant may provide in performing any of the services as outlined in the Requirements Document in the solicitation.
2. Offeror shall complete an Attachment 3-B Key Personnel Form in its entirety for each proposed subcontractor and submit with offer. The term "Subconsultant" shall be annotated in parenthesis after each subcontractor key personnel name typed in the "Name" section of the 3-B form.
3. State may demand additional information about proposed subcontractors as a precondition of award.

YES, the Offeror will use the Subcontractors listed below:

	Subcontractor Key Personnel Name; Subcontractor Firm Name and Contact Information	List Proposed Subcontractor Role(s) and Services	Capacity % Dedicated to Perform the Proposed Role/Service For Any Project Under This Contract
1.	Name		
2.	Name		
3.	Name		
4.	Name		
5.	Name		
6.	Name		
7.	Name		
8.	Name		
9.	Name		
10.	Name		

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**ATTACHMENT 3-C SUPPLEMENTS:**

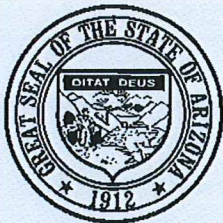
(Offeror to insert as required and list here or type "None" on first line. Offeror shall title any Supplement(s) with the same title as named herein and upload with offer.)

	Title	Document Date	No. of pages	Purpose in Offer
1.	Enter or type "None for Sub #1"	x	x	x
2.	Enter or type "None for Sub #2"	x	x	x
3.	Enter or type "None for Sub #3"	x	x	x
4.	Enter or type "None for Sub #4"	x	x	x
5.	Enter or type "None for Sub #5"	x	x	x
6.	Enter or type "None for Sub #6"	x	x	x
7.	Enter or type "None for Sub #7"	x	x	x
8.	Enter or type "None for Sub #8"	x	x	x
9.	Enter or type "None for Sub #9"	x	x	x
10.	Enter or type "None for Sub #10"	x	x	x

End of Attachment 3-C

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Attachment 3-D  
**Performance Guarantee**

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**RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST**

**End of Attachment 3-D**

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**Attachment 3-E  
 Israel Boycott Form**

All materials submitted as part of a response to a solicitation are subject to Arizona public records law and will be disclosed if there is an appropriate public records request at the time of or after the award of the contract. Recently legislation has been enacted to prohibit the state from contracting with companies currently engaged in a boycott of Israel. To ensure compliance with A.R.S. §35-393.01. This form must be completed and returned with the response to the solicitation and any supporting information to assist the State in making its determination of compliance.

As defined by A.R.S. §35-393.01:

1. "Boycott" means engaging in a refusal to deal, terminating business activities or performing other actions that are intended to limit commercial relations with Israel or with persons or entities doing business in Israel or in territories controlled by Israel, if those actions are taken either:
  - (a) In compliance with or adherence to calls for a boycott of Israel other than those boycotts to which 50 United States Code section 4607(c) applies.
  - (b) In a manner that discriminates on the basis of nationality, national origin or religion and that is not based on a valid business reason.
2. "Company" means a sole proprietorship, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, limited liability company or other entity or business association, and includes a wholly owned subsidiary, majority-owned subsidiary, parent company or affiliate.
3. "Direct holdings" means all publicly traded securities of a company that are held directly by the state treasurer or a retirement system in an actively managed account or fund in which the retirement system owns all shares or interests.
4. "Indirect holdings" means all securities of a company that are held in an account or fund, including a mutual fund, that is managed by one or more persons who are not employed by the state treasurer or a retirement system, if the state treasurer or retirement system owns shares or interests either:
  - (a) together with other investors that are not subject to this section.
  - (b) that are held in an index fund.
5. "Public entity" means this State, a political subdivision of this STATE or an agency, board, commission or department of this state or a political subdivision of this state.
6. "Public fund" means the state treasurer or a retirement system.
7. "Restricted companies" means companies that boycott Israel.
8. "Retirement system" means a retirement plan or system that is established by or pursuant to title 38.

**All offerors must select one of the following:**

- My company does not participate in, and agrees not to participate in during the term of the contract a boycott of Israel in accordance with A.R.S. §35-393.01. I understand that my entire response will become public record in accordance with A.A.C. R2-7-C317.
- My company does participate in a boycott of Israel as defined by A.R.S. §35-393.01. :

By submitting this response, proposer agrees to indemnify and hold the State, its agents and employees, harmless from any claims or causes of action relating to the State's action based upon reliance on the above representations, including the payment of all costs and attorney fees incurred by the State in defending such an action.

Errol L. Montgomery & Associates, Inc.  
 Company Name

Signature of Person Authorized to Sign

1550 E. Prince Road  
 Address

Mark Cross  
 Printed Name

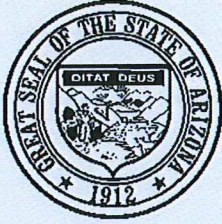
Tucson, AZ 85719  
 City State Zip

President  
 Title

**End of Attachment 3-E**

PART 4 of the Solicitation Documents:  
 Offer Forms (Attachments)

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**Request for Qualifications**  
Solicitation No.  
**ADSP018-00007887**  
Description:  
**2018 Professional Services List**

Arizona Department of  
Administration  
**State Procurement Office**  
100 N 15th Ave., Suite 201  
Phoenix, AZ 85007

Attachment 4  
Pricing Sheet

**RESERVED FOR AWARDED DESIGN PROFESSIONAL SERVICE ORDER CONTRACT**

End of Attachment 4

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Available online at: [Procure.AZ.gov](http://Procure.AZ.gov)



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Arizona Department of  
Administration  
**State Procurement Office**  
100 N 15th Ave., Suite 201  
Phoenix, AZ 85007

**Attachment 5-A  
Confidential Information Designation**

All materials submitted as part of a response to a solicitation are subject to Arizona public records law and will be disclosed if there is an appropriate public records request at the time of or after the award of the contract. Recognizing there may be materials included in a solicitation response that are proprietary or a trade secret, a process is set out in A.A.C. R2-7-103 (copy attached) that will allow qualifying materials to be designated as confidential and excluded from disclosure. For purposes of this process the definition of "trade secret" will be the same as that set out in A.A.C. R2-7-101(52).

Complete this form return it with your Offer along with the appropriate supporting information to assist State in making its determination as to whether any of the materials submitted as part of your Offer should be designated confidential because the material is proprietary or a trade secret and therefore not subject to disclosure.

STATE WILL NOT CONSIDER ANY MATERIAL IN YOUR OFFER "CONFIDENTIAL" UNLESS DESIGNATED ON THIS FORM.

**Check one of the following** – if neither is checked, State will assume that as equivalent to "DOES NOT":

<input checked="" type="checkbox"/>	This response DOES NOT contain proprietary or trade secret information. I understand that my entire response will become public record in accordance with A.A.C. R2-7-C317.
<input type="checkbox"/>	This response DOES contain trade secret information because it contains information that: <ol style="list-style-type: none"> <li>1. Is a formula, pattern, compilation, program, device, method, technique or process, AND</li> <li>2. Derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use; AND</li> <li>3. Is the subject of efforts by myself or my organization that are reasonable under the circumstances to maintain its secrecy.</li> </ol>

NOTE: Failure to attach an explanation may result in a determination that the information does not meet the statutory trade secret definition. All information that does not meet the definition of trade secret as defined by A.A.C. R2-7-101(52) will become public in accordance with A.A.C. R2-7-C317. State may make its own determination on materials in accordance with A.A.C. R2-7-103.

If State agrees with Offeror's designation of trade secret or confidentiality and the determination is challenged, the undersigned hereby agrees to cooperate and support the defense of the determination with all interested parties, including legal counsel or other necessary assistance.

By submitting this response, Offeror agrees that the entire Offer, including confidential, trade secret and proprietary information may be shared with an evaluation committee and technical advisors during the evaluation process. Offeror agrees to indemnify and hold State, its agents and employees, harmless from any claims or causes of action relating to State's withholding of information based upon reliance on the above representations, including the payment of all costs and attorney fees incurred by State in defending such an action.

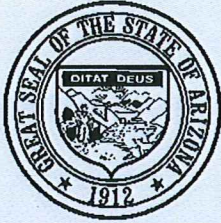
**Errol L. Montgomery & Associates, Inc.**

Offeror Company Name
<b>1550 E. Prince Road</b>
Address

<b>Signature of Authorized Person</b>
<b>Mark Cross</b>
Printed Name

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**ADSP018-00007887**  
 Description:  
**2018 Professional Services List**

Arizona Department of  
 Administration  
**State Procurement Office**  
 100 N 15th Ave., Suite 201  
 Phoenix, AZ 85007

Tucson, AZ 85719

President

City	State	Zip
------	-------	-----

Title
-------

**ATTACHMENT 5-A SUPPLEMENTS:**

(Offeror to insert as required and list here or type "None" on first line. Offeror shall title any Supplement(s) with the same title as named herein and upload with offer.)

	Title	Document Date	No. of pages	Purpose in Offer
1.	None	x	x	x

End of Attachment 5-A

PART 4 of the Solicitation Documents:  
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## Request for Qualifications

Solicitation No.  
**ADSP018-00007887**

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100 N 15th Ave., Suite 201  
Phoenix, AZ 85007

### *Copy of A.A.C. R2-7-103 [Confidential Information] as was current at time of Solicitation issuance*

PROVIDED FOR REFERENCE ONLY

- A. *If a person wants to assert that a person's offer, specification, or protest contains a trade secret or other proprietary information, a person shall include with the submission a statement supporting this assertion. A person shall clearly designate any trade secret and other proprietary information, using the term "confidential". Contract terms and conditions, pricing, and information generally available to the public are not considered confidential information under this Section.*
- B. *Until a final determination is made under subsection (C), an agency chief procurement officer shall not disclose information designated as confidential under subsection (A) except to those individuals deemed by an agency chief procurement officer to have a legitimate state interest.*
- C. *Upon receipt of a submission, an agency chief procurement officer shall make one of the following written determinations:*
- 1. The designated information is confidential and the agency chief procurement officer shall not disclose the information except to those individuals deemed by the agency chief procurement officer to have a legitimate state interest;*
  - 2. The designated information is not confidential; or*
  - 3. Additional information is required before a final confidentiality determination can be made.*
- D. *If an agency chief procurement officer determines that information submitted is not confidential, a person who made the submission shall be notified in writing. The notice shall include a time period for requesting a review of the determination by the state procurement administrator.*
- E. *An agency chief procurement officer may release information designated as confidential under subsection (A) if:*
- 1. A request for review is not received by the state procurement administrator within the time period specified in the notice; or*
  - 2. The state procurement administrator, after review, makes a written determination that the designated information is not confidential.*

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	<b>Request for Qualifications</b> Solicitation No. <b>ADSP018-00007887</b> Description: <b>2018 Professional Services List</b>	Arizona Department of Administration <b>State Procurement Office</b> 100 N 15th Ave., Suite 201 Phoenix, AZ 85007
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Attachment 5-B  
**Conformance Statements**

STATE WILL NOT CONSIDER ANY EXCEPTIONS UNLESS DESIGNATED ON THIS FORM.

READ THE INSTRUCTIONS TO OFFERORS BEFORE TAKING ANY EXCEPTIONS – TAKING EXCEPTIONS CAN BE  
 GROUNDS FOR STATE REJECTING YOUR OFFER IN EVALUATION.

**CONFORMANCE TO THE INSTRUCTIONS:  
 (PART 1 OF THE SOLICITATION)**

Check one of the following – if neither is checked, State will assume that as equivalent to “YES”:

YES – Offeror acknowledges that it has read and understands the Solicitation Summary in Section 1-A of the Solicitation Documents and the Instructions to Offerors in Section 1-B of the Solicitation Documents and the and attests that its Offer complies with both.

NO – Offeror acknowledges that it has read and understands the Solicitation Summary in Section 1-A of the Solicitation Documents and the Instructions to Offerors in Section 1-B of the Solicitation Documents, and attests that its Offer complies with both EXCEPT FOR the exceptions listed in **Attachment 5-B Supplement 1**.

**CONFORMANCE TO THE CONTRACT TERMS AND CONDITIONS:  
 (PART 2 OF THE SOLICITATION)**

Check one of the following – if neither is checked, State will assume that as equivalent to “YES”:

YES – Offeror acknowledges that it has read and understands the Special Terms and Conditions and the Uniform Terms and Conditions, along with their respective Exhibits and Appendices, in Part 2 of the Solicitation Documents and attests that its Offer complies with both.

NO – Offeror acknowledges that it has read and understands the Special Terms and Conditions and the Uniform Terms and Conditions, along with their respective Exhibits and Appendices in Part 2 of the Solicitation Documents and attests that its Offer complies with both EXCEPT FOR the exceptions listed in **Attachment 5-B Supplement 2**.

**CONFORMANCE TO THE TECHNICAL DOCUMENTS:  
 (PART 3 OF THE SOLICITATION)**

Check one of the following – if neither is checked, State will assume that as equivalent to “YES”:

YES – Offeror acknowledges that it has read and understands the Requirements Document and the Compensation Document in Part 3 of the Solicitation Documents and attests that its Offer complies with both.

NO – Offeror acknowledges that it has read and understands the Requirements Document and the Compensation Document, in Part 3 of the Solicitation Documents and attests that its Offer complies with both

PART 4 of the Solicitation Documents:  
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	<b>Request for Qualifications</b> Solicitation No. <b>ADSP018-00007887</b> Description: <b>2018 Professional Services List</b>	Arizona Department of Administration <b>State Procurement Office</b> 100 N 15th Ave., Suite 201 Phoenix, AZ 85007
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EXCEPT FOR the exceptions listed in **Attachment 5-B Supplement 3**.

ATTACHMENT 5-B Supplement No. 1:  
**Exceptions to Instructions**

Article / Paragraph or Exhibit Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
<b>Section 1-A: Solicitation Summary</b>		
<b>x</b>	<b>x</b>	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>
<b>Section 1-B: Instructions to Offerors</b>		
<b>x</b>	<b>x</b>	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>

ATTACHMENT 5-B Supplement No. 2:  
**Exceptions to Contract Terms & Conditions**

Article/ Paragraph or Exhibit Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
<b>Section 2-A: Special Terms &amp; Conditions</b>		
<b>x</b>	<b>x</b>	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>
Article/ Paragraph or Appendix Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
<b>Section 2-B: Uniform Terms &amp; Conditions</b>		

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**Request for Qualifications**  
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Arizona Department of  
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**State Procurement Office**  
 100 N 15th Ave., Suite 201  
 Phoenix, AZ 85007

Article/ Paragraph or Appendix Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
<b>Section 2-B: Uniform Terms &amp; Conditions</b>		
<b>X</b>	x	x
<b>X</b>	x	x
<b>X</b>	x	x

**ATTACHMENT 5-B Supplement No. 3:**  
**Exceptions to Technical and Commercial**

Article / Paragraph or Exhibit Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
<b>Section 2-A Scope of Work (Requirements Document)</b>		
<b>x</b>	x	x
<b>x</b>	x	x
<b>x</b>	x	x
<b>Section 2-B: Compensation Document</b>		
<b>x</b>	x	x
<b>x</b>	x	x
<b>x</b>	x	x

Errol L. Montgomery & Associates, Inc.

Company Name

Signature of Person Authorized to Sign

**End of Attachment 5-B**

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**Request for Qualifications**  
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Arizona Department of  
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100 N 15th Ave., Suite 201  
Phoenix, AZ 85007

Attachment 5-C  
Insurance Evidence

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**RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST**

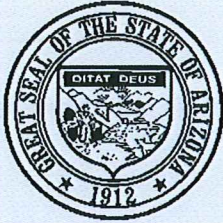
End of Attachment 5-C

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**Request for Qualifications**

Solicitation No.  
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**2018 Professional Services List**

Arizona Department of  
Administration  
**State Procurement Office**  
100 N 15th Ave., Suite 201  
Phoenix, AZ 85007

**Attachment 5-D  
Offer Checklist**

STATE MAY DETERMINE YOUR PROPOSAL IS NON-RESPONSIVE IF YOU DO NOT SUBMIT ALL ATTACHMENTS.

	DOCUMENT	SUBMITTED
1.	Attachment 1: Offer and Acceptance Form - <b>SIGNED</b>	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
2.	Attachment 2-A: Experience and Capacity	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
3.	Attachment 2-A: References	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
4.	Attachment 2-B: Organization Profile	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
5.	Attachment 3-A: Method Proposal – <b>RESERVED FOR AWARD</b>	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
6.	Attachment 3-B: Key Personnel Proposal	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
7.	Attachment 3-C: Proposed Subcontractors – <b>RESERVED FOR AWARD</b>	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
8.	Attachment 3-D: Performance Guarantee – <b>RESERVED FOR AWARD</b>	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
9.	Attachment 3-E: Israel Boycott Form - <b>SIGNED</b>	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
10.	Attachment 4: Pricing Sheet – <b>RESERVED FOR AWARD</b>	<input type="checkbox"/> YES, <input checked="" type="checkbox"/> no
11.	Attachment 5-A: Confidential Information Designation - <b>SIGNED</b>	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
12.	Attachment 5-B: Conformance Statements - <b>SIGNED</b>	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
13.	Attachment 5-C: Insurance Evidence – <b>RESERVED FOR AWARD</b>	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
14.	Attachment 5-D: Offer Checklist	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
15.	.pdf File: Number of Projects and Revenue	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
16.	Excel File: 2018 Professional Services List of Firms Services	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no

**End of Attachment 5-D**

**End of Part 4**

PART 4 of the Solicitation Documents:  
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TYPE OF PROJECT	TOTAL NUMBER OF FIRM PROJECTS (ALL FIRM LOCATIONS) COMPLETED IN LAST THREE YEARS	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY state, municipal, federal etc. government projects only	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY non-government projects only	TYPE OF PROJECT	TOTAL NUMBER OF FIRM PROJECTS (ALL FIRM LOCATIONS) COMPLETED IN LAST THREE YEARS	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY state, municipal, federal etc. government projects only	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY non-government projects only
Acoustics, Noise Abatement				Land Surveying			
Activity Centers				Landscape Architecture			
Aerial Photography; Airborne Data and Imagery Collection and Analysis				LEED Accredited A/E			
Agricultural Development; Grain Storage; Farm Mechanization				LEED Independent 3rd Party Building Commissioning			
Air Pollution Control				Libraries; Museums; Galleries			
Airports; Navais; Airport Lighting; Aircraft Fueling				Lighting (Exteriors; Streets; Memorials; Athletic Fields, Etc.)			
Airports; Terminals and Hangars; Freight Handling				Lighting (Interior; Display; Theater, Etc.)			
Animal Facilities				Lighting (Cave; Cavern)			
Anti-Terrorism/Force Protection				Mapping Location/Addressing Systems			
Area Master Planning				Materials Handling Systems; Conveyors; Sorters			
Auditoriums and Theaters				Materials Testing			
Automation; Controls; Instrumentation				Measurement / Verification / Conservation Water Consumption	7	2	0
Barracks; Dormitories				Medical Related			
Bridge Design: Bridges				Metallurgy			
Cartography				Mining and Mineralogy			
Cemeteries (Planning and Relocation)				Modular Systems Design; Pro-Fabricated Structures or Components			
Chemical Processing and Storage				Mold Investigation			
Child Care/Development Facilities				Museums			
Codes; Standards; Ordinances				Nuclear Facilities; Nuclear Shielding			
Cold Storage; Refrigeration and Fast Freeze				Office Buildings; Industrial Parks			
Commercial Building (Low Rise); Shopping Centers				Outdoor Recreation			
Communications Systems; TV; Microwave				Petroleum and Fuel (Storage and Distribution)			
Community Facilities				Phase I Environmental			
Computer Facilities				Photogrammetry			
Conservation and Resource Management				Pipelines (Cross-Country - Liquid and Gas)			
Construction Management				Plumbing and Piping Design			
Construction Materials Testing				Pneumatic Structures, Air-Support Buildings			
Construction Surveying				Power Generation, Transmission, Distribution			
Controls and Electronics Engineer				Prisons and Correctional Facilities			
Corrosion Control; Cathodic Protection Electrolysis				Product, Machine Equipment Design			
Cost Estimating; Cost Engineering and Analysis; Parametric Costing; Forecasting				Public Safety Facilities			
Cryogenic Facilities				Radar; Sonar; Radio and Radar Telescopes			
Dams (Concrete; Arch)				Radio Frequency Systems and Shieldings			
Dams (Earth; Rock); Dikes; Levees				Railroad; Rapid Transit			
Desalinization (Process and Facilities)				Recreation Facilities (Parks, Marinas, Etc.)			
Design & Planning Structured Parking Facilities				Refrigeration Plants/Systems			
Design-Build - Preparation of Requests for Proposals				Rehabilitation (Buildings; Structures; Facilities)			
Detention Security Systems				Research Facilities			
Digital Elevation and Terrain Model Development				Resources Recovery; Recycling			
Digital Orthophotography				Rivers; Canals; Waterways; Flood Control			
Dining Halls; Clubs; Restaurants				Roof Infrared Imaging to Identify Water Leaks			
Disability / Special Needs				Roofing			
Dredging Studies and Design				Safety Engineering; Accident Studies; OSHA Studies			
Ecological and Archeological Investigations				Security Systems; Intruder and Smoke Detection			
Educational Facilities; Classrooms				Seismic Designs and Studies			
Electrical Studies and Design				Sewage Collection, Treatment and Disposal			
Electronics				Soils and Geologic Studies; Foundations			
Elevators; Escalators; People-Movers				Solar Energy Utilization			
Energy / Water Auditing Savings				Solid Wastes; Incineration; Landfill			
Energy Conservation; New Energy Sources				Special Environments; Clean Rooms, Etc.			
Environmental Impact Studies, Assessments or Statements	1		0	Specifications Writing			
Fallout Shelters; Blast-Resistant Design				Storm Water Handling and Facilities			
Fire Protection				Structural Design; Special Structures			
Fisheries; Fish Ladders				Surveying; Platting; Mapping; Flood Plain Studies			
Forensic Engineering				Sustainable Design			
Garages; Vehicles Maintenance Facilities; Parking				Swimming Pools			
Gas Systems (Propane; Natural, Etc.)				Testing and Inspection Services			
Geodetic Surveying: Ground and Airborne				Topographic Surveying and Mapping			
Heating; Ventilating; Air Conditioning				Towers (Self-Supporting and Guyed Systems)			
Highways; Streets; Airfield Paving; Parking Lots				Toxicology			
Historical Preservation				Traffic and Transportation Engineering			
Hospital and Medical Facilities				Traffic Studies			
Hotels; Motels				Transportation			
Housing (Residential, Multi-Family; Apartments; Condominiums)				Tunnels and Subways			
Hydraulics and Pneumatics				Urban Renewals; Community Development			
Hydrographic Surveying				Utilities (Gas and Steam)			
Industrial Buildings; Manufacturing Plants				Value Analysis; Life-Cycle Costing			
Industrial Processes; Quality Control				Warehouse and Depots			
Industrial Waste Treatment				Waste Water Treatment Facility			
Intelligent Transportation Systems				Water Resources; Hydrology; Ground Water	145	5	7
Infrastructure				Water Supply; Treatment and Distribution			
Irrigation; Drainage				Water Well Rehabilitation; Water Well Work	1	0	1
Judicial and Courtroom Facilities				Wind Tunnels; Research/Testing Facilities Design			
Laboratories; Medical Research Facilities				Zoning; Land Use Studies			
Labs - General							
Labs - Research - Dry							
Labs - Research - Wet							

Professional Services Index Number	Revenue
1.	Less than \$100,000
2.	\$100,000 to less than \$250,000
3.	\$250,000 to less than \$500,000
4.	\$500,000 to less than \$1 Million
5.	\$1 Million to less than \$2 Million
6.	\$2 Million to less than \$5 Million
7.	\$5 Million to less than \$10 Million
8.	\$10 Million to less than \$25 Million
9.	\$25 Million to less than \$50 Million
10.	\$50 Million or greater

**SAM Search Results**  
**List of records matching your search for :**

**Search Term : errol\* l. montgomery\***  
**Record Status: Active**

<b>ENTITY</b>	ERROL L. MONTGOMERY & ASSOCIATES, INC.	Status:Active
DUNS: 139461024	+4:	CAGE Code: 3E8B4 DoDAAC:
Expiration Date: Nov 29, 2018	Has Active Exclusion?: No	Debt Subject to Offset?: No
Address: 1550 E PRINCE RD		
City: TUCSON	State/Province: ARIZONA	
ZIP Code: 85719-1943	Country: UNITED STATES	

# STATE OF ARIZONA



Office of the  
**CORPORATION COMMISSION**

**CERTIFICATE OF GOOD STANDING**

To all to whom these presents shall come, greeting:

I, Ted Vogt, Executive Director of the Arizona Corporation Commission, do hereby certify that

**\*\*\*ERROL L. MONTGOMERY & ASSOCIATES, INC.\*\*\***

a domestic corporation organized under the laws of the State of Arizona, did incorporate on June 11 1984.

I further certify that according to the records of the Arizona Corporation Commission, as of the date set forth hereunder, the said corporation is not administratively dissolved for failure to comply with the provisions of the Arizona Business Corporation Act; and that its most recent Annual Report, subject to the provisions of A.R.S. sections 10-122, 10-123, 10-125 & 10-1622, has been delivered to the Arizona Corporation Commission for filing; and that the said corporation has not filed Articles of Dissolution as of the date of this certificate.

This certificate relates only to the legal existence of the above named entity as of the date issued. This certificate is not to be construed as an endorsement, recommendation, or notice of approval of the entity's condition or business activities and practices.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the official seal of the Arizona Corporation Commission. Done at Phoenix, the Capital, this 4th day of January, 2018, A. D.



  
Ted Vogt, Executive Director

By: 1801545

**STATE OF ARIZONA  
BOARD OF TECHNICAL REGISTRATION**

**■ FIRM REGISTRATION ■**

**FIRM REGISTRATION NO.: 10223-0**

**FIRM NAME**  
Errol L. Montgomery & Associates, Inc.

**FIRM ADDRESS**  
1550 E. Prince Road  
Tucson, Arizona 85719

**EXPIRES:**

**5/31/2018**

**SERVICES OFFERED**  
Geology



**MELISSA CORNELIUS  
EXECUTIVE DIRECTOR  
FOR THE BOARD**

**1912**



**ARIZONA**

**DEUS**

