



**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**

ATTACHMENT 1..... OFFER AND ACCEPTANCE FORM .....2  
 ATTACHMENT 2-A.... EXPERIENCE AND CAPACITY .....3  
 1.0 .... FIVE (5) EXAMPLE PROJECTS .....3  
 ATTACHMENT 2-A.... EXPERIENCE AND CAPACITY .....5  
 2.0 .... EMPLOYEES BY DISCIPLINE.....5  
 3.0 .... FIRMS EXPERIENCE AND REVENUE .....7  
 4.0 .... FIRMS SERVICES .....7  
 5.0 .... EXPERIENCE REFERENCES:.....8  
 ATTACHMENT 2-B.... ORGANIZATION PROFILE ..... 11  
 ATTACHMENT 3-A.... METHOD PROPOSAL..... 13  
 ATTACHMENT 3-B.... KEY PERSONNEL PROPOSAL..... 14  
 ATTACHMENT 3-C ... PROPOSED SUBCONTRACTORS .....23  
 ATTACHMENT 3-D ... PERFORMANCE GUARANTEE.....25  
 ATTACHMENT 3-E.... ISRAEL BOYCOTT FORM .....26  
 ATTACHMENT 4..... PRICING SHEET .....28  
 ATTACHMENT 5-A.... CONFIDENTIAL INFORMATION DESIGNATION.....29  
 ATTACHMENT 5-B.... CONFORMANCE STATEMENTS .....32  
 ATTACHMENT 5-C ... INSURANCE EVIDENCE .....35  
 ATTACHMENT 5-D ... OFFER CHECKLIST.....36

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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 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.	1/15/2018	ARC	
	date		initial	

**TeamConverse LLC**

Offeror company name

*Allan R Converse* ARC

Signature of person authorized to sign Offer Initials

**4666 E. Donato Dr**

Address

**Allan R. Converse Principal**

Printed name and title

**Gilbert, AZ 85298**

City | State | ZIP

**Allan R. Converse Principal**

Contact name and title

**13-4299252**

Federal tax identifier (EIN or SSN)

**allan@teamconverse.net**

**480-634-1533**

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 1/15/2018 (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.

1/30/2018-1/31/2019

State's Contract No. is: **ADSP018-00007887** The effective date of the Contract: \_\_\_\_\_ Contract awarded: 1/30/2018

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

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.



**Request for Qualifications**  
 Solicitation No.  
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**2018 Professional Services List**

Arizona Department of  
 Administration  
**State Procurement Office**  
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 Phoenix, AZ 85007

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
Silverbell Nitrate Removal Water Plant, Marana	2016	2018	DEMA	\$2.0M	\$2.0M	Nitrate Removal Water Treatment Plant, Building Utilities and Appurtenances
San Carlos Medical Center Peridot AZ	2013	2016	San Carlos Apache	\$1.5M our section	\$140M	Hospital and clinics with housing for staff, general civil engineering and water and wastewater systems
Liberty School Water System Buckeye AZ	2017		Liberty School District	\$625K	90%	New Arsenic removal Water treatment plant and storage, pressurization system
Pecos MMA Training Facility Gilbert, AZ			Pecos MMA Inc.	\$1.25M	\$1.25M	Onsite and offsite utilities Subsurface storm water System, well mitigation, Parking AUP and structure
Silverbell storm water Marana, AZ	2016	2017	DEMA	\$95K	\$95K	Channeling and retention of storm water flow, drywells, multiple culverts and basin wall erosion protection

	<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 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

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

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).



**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

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
Civil Engineer	P	4	
Sanitary Engineer	S	1	
Environmental Engineer	S	1	
Construction Manager	P	1	
Construction Inspector	S	1	
CADD Technician	P	3	





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Solicitation No.  
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Arizona Department of  
Administration  
**State Procurement Office**  
100 N 15th Ave., Suite 201  
Phoenix, AZ 85007

**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.

<b>1</b>	<b>Client Company/Address</b>	<b>Contact</b>	<b>Begin Date</b>	<b>End Date</b>
	<b>Paragon Dev. 2241 E Pecos, Chandler AZ 85225</b>	<b>Bruce Dunn</b>	<b>5/2014</b>	<b>1/1/2018</b>
	<b>Phone Number</b>	<b>Email Address</b>		
	<b>480-726-7575</b>	<b>Bruce.dunn@paragonarizona.com</b>		
List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities. <b>x San Tan Crossing Office Condos, Chandler, AZ \$85,000</b>				
Services performed similar to those described in Solicitation <b>Engineering, Construction Supervision</b>				
<b>2</b>	<b>Client Company/Address</b>	<b>Contact</b>	<b>Begin Date</b>	<b>End Date</b>
	<b>DEMA 5636 E. McDowell Rd Phx, AZ 85008</b>	<b>Gerald Paulus</b>	<b>1/1/2017</b>	<b>1/1/2018</b>
	<b>Phone Number</b>	<b>Email Address</b>		
	<b>602-267-2519</b>	<b>gerald.paulus@fmo.azdema.gov</b>		
List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities. <b>Silverbell Water Treatment System \$156,000</b>				
Services performed similar to those described in Solicitation <b>Engineering, Construction Supervision</b>				
<b>3</b>	<b>Client Company/Address</b>	<b>Contact</b>	<b>Begin Date</b>	<b>End Date</b>
	<b>State Parks, 1220 S. St Francis Dr. Santa Fe, NM 87505</b>	<b>Ron taylor PE</b>	<b>6/2016</b>	<b>1/1/2018</b>
	<b>Phone Number</b>	<b>Email Address</b>		
	<b>505-476-3373</b>	<b>Ronj.taylor@state.nm.us</b>		
List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities. <b>Bluewater State Park Wastewater Design Oasis Park Wastewater Design, Brantley Water Design \$55,000</b>				

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

Date: January 8, 2018  
Page 8 of 36





**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

Services performed similar to those described in Solicitation

**Engineering, Construction Supervision**


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

Date: January 8, 2018  
 Page 9 of 36



**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

**End of Attachment 2-A**

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

Date: January 8, 2018  
Page 10 of 36

4

	<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 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>	TeamConverse LLC		Year established	2004
Principal address (street, city, state)	4666 E. Donato Dr. Gilbert, AZ 85298			
Entity type:	Professional Engineering	Structure:	LLC Manager Managed	
Branch or Division:	Firm	Parent:	TeamConverse LLC	
Years the organization has conducted business in Arizona.				x
<b>Contract Representatives to Contact</b>				
	Name	Title	Telephone Number	E-Mail Address
1.	Allan Converse	Principal	480-634-1533	allan@teamconverse.net
2.	Leslie Converse	Principal	480-634-1533	Leslie@teamconverse.ent
3.	x	x	x	x
<b>Firm Professional Registration (INCLUDE COPY OF DOCUMENT IN OFFER)</b>				
	Description	Issuer	Number	Expiration
4.	Arizona Board of Technical Registration	State of Arizona	16855-0	4/30/2018

**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.).



**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

	Title	Document Date	No. of pages	Purpose in Offer
1.	Enter or delete row if not needed	x	x	
2.	Enter or delete row if not needed			
3.	Enter or delete row if not needed			
4.	Enter or delete row if not needed			
5.	Enter or delete row if not needed			
6.	Enter or delete row if not needed			
7.	Enter or delete row if not needed			

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

**End of Attachment 2-B**



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

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

**End of Attachment 3-A**

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

Date: January 8, 2018  
Page 13 of 36

**4**



**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 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>Allan R. Converse</b>	How long with company?	<b>14 years</b>
	Current position in company:	<b>Principal – Project Manager</b>	How long in position?	<b>14 years</b>
	Position for the Services:	<b>Project Manager/Senior Consultant</b>	How much of time will be dedicated to the Services?	<b>100 %</b>
	What primary functions will be assigned?	<b>Project Manager, process designer, CADD drafting, SIOH</b>		
	Describe person's experience in performing services like those that are to be assigned:	<b>41 years experience with over 400 water, wastewater, storm water, and land development projects in Arizona</b>		
	List person's job-related training and education:	<b>Civil and Sanitary Engineering Studies University of Iowa 1971 USEPA MEDCAR Specialized Education in Water and Wastewater</b>		



**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

<b>Resume:</b>	<a href="#">List filename</a>		
<b>2</b>	<b>Name:</b>	<a href="#">Jerry D. Morrow, PE</a>	How long with company? <a href="#">13 years</a>
	Current position in company:	<a href="#">Senior Engineer</a>	How long in position? <a href="#">13 years</a>
	Position for the Services:	<a href="#">Senior Engineer</a>	How much of time will be dedicated to the Services? <a href="#">100 %</a>
	What primary functions will be assigned?	<a href="#">Responsible Engineer for project design and supervision of project staff</a>	
	Describe person's experience in performing services like those that are to be assigned:	<a href="#">Over \$755 million of water, wastewater, power, and land development projects in past 36 years</a>	
	List person's job-related training and education:	<a href="#">Masters Degree Civil and Sanitary Engineer</a> Registered Professional Engineer in multiple states	
<b>Resume:</b>	<a href="#">List filename</a>		



**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

<b>3</b>	<b>Name:</b>	<b>Gary Spehar PE</b>	How long with company?	<b>11 years</b>
	Current position in company:	<b>Project Engineer</b>	How long in position?	<b>11 years</b>
	Position for the Services:	<b>Designer/CADD</b>	How much of time will be dedicated to the Services?	<b>50 %</b>
	What primary functions will be assigned?	<b>Design of process components, plan development and production</b>		
	Describe person's experience in performing services like those that are to be assigned:	<b>Over 31 years designing projects with process design responsibility</b>		
	List person's job-related training and education:	<b>Degrees in Civil Engineering</b> Registered Civil Engineer in multiple states		
	<b>Resume:</b>	<b>List filename</b>		





**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

<b>4</b>	<b>Name:</b>	<b>Mikel Castillo</b>	How long with company?	<b>14 years</b>
	Current position in company:	<b>Project Coordinator</b>	How long in position?	<b>14</b>
	Position for the Services:	<b>Project Coordinator</b>	How much of time will be dedicated to the Services?	<b>100%</b>
	What primary functions will be assigned?	<b>Project Management, allocation of resources, records control</b>		
	Describe person's experience in performing services like those that are to be assigned:	<b>32 years delivering project on time and within budget</b>		
	List person's job-related training and education:	<b>Computerized scheduling, costing and project management systems training</b>		
	<b>Resume:</b>	<b>List filename</b>		



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 Administration  
**State Procurement Office**  
 100 N 15th Ave., Suite 201  
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<b>5</b>	<b>Name:</b>	<b>Robert J. Youness, PE</b>	How long with company?	<b>13 years</b>
	Current position in company:	<b>Project Engineer</b>	How long in position?	<b>13</b>
	Position for the Services:	<b>Designer/CADD</b>	How much of time will be dedicated to the Services?	<b>50%</b>
	What primary functions will be assigned?	<b>Project design, plan and specification preparation QA/QC</b>		
	Describe person's experience in performing services like those that are to be assigned:	<b>Over 35 years performing project design and plan preparation</b>		
	List person's job-related training and education:	<b>Degree in Civil Engineering</b>		
	<b>Resume:</b>	<b>List filename</b>		



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 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

<b>6</b>	<b>Name:</b>	<input checked="" type="checkbox"/>	How long with company?	<input type="text" value="x years"/>
	Current position in company:	<input checked="" type="checkbox"/>	How long in position?	<input type="text" value="x"/>
	Position for the Services:	<input checked="" type="checkbox"/>	How much of time will be dedicated to the Services?	<input type="text" value="x%"/>
	What primary functions will be assigned?	<input checked="" type="checkbox"/>		
	Describe person's experience in performing services like those that are to be assigned:	<input checked="" type="checkbox"/>		
	List person's job-related training and education:	<input checked="" type="checkbox"/>		
	<b>Resume:</b>	<input type="text" value="List filename"/>		



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 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

<b>7</b>	<b>Name:</b>	<input checked="" type="checkbox"/>	How long with company?	<input type="text" value="x years"/>
	Current position in company:	<input checked="" type="checkbox"/>	How long in position?	<input type="text" value="x"/>
	Position for the Services:	<input checked="" type="checkbox"/>	How much of time will be dedicated to the Services?	<input type="text" value="x%"/>
	What primary functions will be assigned?	<input checked="" type="checkbox"/>		
	Describe person's experience in performing services like those that are to be assigned:	<input checked="" type="checkbox"/>		
	List person's job-related training and education:	<input checked="" type="checkbox"/>		
	<b>Resume:</b>	<input type="text" value="List filename"/>		



**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

<b>8</b>	<b>Name:</b>	<input checked="" type="checkbox"/>	How long with company?	<input checked="" type="checkbox"/> years
	Current position in company:	<input checked="" type="checkbox"/>	How long in position?	<input checked="" type="checkbox"/>
	Position for the Services:	<input checked="" type="checkbox"/>	How much of time will be dedicated to the Services?	<input checked="" type="checkbox"/> %
	What primary functions will be assigned?	<input checked="" type="checkbox"/>		
	Describe person's experience in performing services like those that are to be assigned:	<input checked="" type="checkbox"/>		
	List person's job-related training and education:	<input checked="" type="checkbox"/>		
	<b>Resume:</b>	<input checked="" type="checkbox"/> List filename		

	<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 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.	Enter or delete row if not needed	NONE	x	
2.	Enter or delete row if not needed			
3.	Enter or delete row if not needed			
4.	Enter or delete row if not needed			
5.	Enter or delete row if not needed			
6.	Enter or delete row if not needed			
7.	Enter or delete row if not needed			

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

**End of Attachment 3-B**



**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 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		



**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 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**

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

Date: January 8, 2018  
 Page 24 of 36





**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 3-D  
**Performance Guarantee**

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

**End of Attachment 3-D**

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

Date: January 8, 2018  
Page 25 of 36

**4**

	<p align="center"><b>Request for Qualifications</b> Solicitation No. <b>ADSP018-00007887</b> Description: <b>2018 Professional Services List</b></p>	<p align="right">Arizona Department of Administration <b>State Procurement Office</b> 100 N 15th Ave., Suite 201 Phoenix, AZ 85007</p>
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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.

TeamConverse LLC <hr/>	 <hr/>
Company Name 4666 E. Donato Dr <hr/>	Signature of Person Authorized to Sign Allan R. Converse <hr/>
Address <hr/>	Printed Name <hr/>
Gilbert AZ 85298 <hr/>	Principal <hr/>
City State Zip <hr/>	Title <hr/>

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

Date: January 8, 2018  
Page 26 of 36

	<p><b>Request for Qualifications</b> Solicitation No. <b>ADSP018-00007887</b> Description: <b>2018 Professional Services List</b></p>	<p>Arizona Department of Administration <b>State Procurement Office</b> 100 N 15th Ave., Suite 201 Phoenix, AZ 85007</p>
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End of Attachment 3-E

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

Date: January 8, 2018  
Page 27 of 36

4



**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**

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

**End of Attachment 4**

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

Date: January 8, 2018  
Page 28 of 36

**4**

	<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-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="radio"/>	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="radio"/>	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.

**TeamConverse LLC**

Offeror Company Name	Signature of Authorized Person
4666 E. Donato Dr	Allan R. Converse
Address	Printed Name

*Allan R. Converse*

Signature of Authorized Person
Allan R. Converse
Printed Name

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

Date: January 8, 2018  
 Page 29 of 36

	<p align="center"><b>Request for Qualifications</b>  Solicitation No.  <b>ADSP018-00007887</b>  Description:  <b>2018 Professional Services List</b></p>	<p align="right">Arizona Department of  Administration  <b>State Procurement Office</b>  100 N 15th Ave., Suite 201  Phoenix, AZ 85007</p>
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Gilbert AZ 85298

Principal

City	State	Zip	Title
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**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.	Enter or type "None"	None	x	x
2.	Enter or delete row if not needed			
3.	Enter or delete row if not needed			

**End of Attachment 5-A**



**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

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

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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.

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

Date: January 8, 2018  
Page 32 of 36



	<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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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 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>	None	<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>	None	<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>	None	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>
<b>x</b>	<b>x</b>	<b>x</b>

	<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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Article/ Paragraph or Appendix Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
Section 2-B: Uniform Terms & Conditions		
<b>X</b>	None	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
Section 2-A Scope of Work (Requirements Document)		
<b>x</b>	None	x
<b>x</b>	x	x
<b>x</b>	x	x
Section 2-B: Compensation Document		
<b>x</b>	None	x
<b>x</b>	x	x
<b>x</b>	x	x

4666 E. Donato Dr

Company Name



Signature of Person Authorized to Sign

**End of Attachment 5-B**

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

Date: January 8, 2018  
 Page 34 of 36



**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 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.  
**ADSP018-00007887**  
 Description:  
**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>	x YES <input type="checkbox"/> no
2.	Attachment 2-A: Experience and Capacity	X YES <input type="checkbox"/> no
3.	Attachment 2-A: References	x YES <input type="checkbox"/> no
4.	Attachment 2-B: Organization Profile	X 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	x 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>	x 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>	x YES <input type="checkbox"/> no
12.	Attachment 5-B: Conformance Statements - <b>SIGNED</b>	x 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	x YES <input type="checkbox"/> no
15.	.pdf File: Number of Projects and Revenue	x YES <input type="checkbox"/> no
16.	Excel File: 2018 Professional Services List of Firms Services	x YES <input type="checkbox"/> no

**End of Attachment 5-D**

**End of Part 4**

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

Date: January 8, 2018  
 Page 36 of 36