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Robinson & Foster, Inc.

771 THIRD STREET, N.E.
WASHINGTON, D.C. 20002

TELEPHONE: 202.547.1995

FAX: 202.547.1140

May 24, 1999

By Fax (202) 395-3982
And Hand Delivered

Kathleen E. O'Halloran
Contracting Officer
EOP/Office of Administration
725 17th Street, NW
New Executive Office Building
Room 5002
Washington, D.C. 20502

Re: Request for Quotes #99-OPD/ONAP-01

Dear Ms. O'Halloran:

Thank you for inviting Robinson & Foster, Inc. to submit an offer to provide professional services to support ONAP in connection with the re-authorization of the Ryan White CARE Act, and to provide guidance and support for ONAP in its efforts to improve the nation's response to the international pandemic of HIV/AIDS as it relates to children. This letter responds to the four categories of information sought by the Request for Quotes, specifically a) availability to perform during the cited period; b) written documentation detailing and demonstrating offeror's technical qualifications, with resumes of the persons proposed to perform the requested services, c) past performance references, and d) price quote at a fixed hourly rate.

A. Availability to Perform During the Cited Period.

Robinson & Foster is available to provide professional services during the contract period of performance.

B. Technical Qualifications.

The principals of Robinson & Foster have a great deal of experience and expertise relating to the Ryan White CARE Act, ranging from Congressional debates on about the appropriate funding levels for the different Titles of the CARE Act, to the data collection procedures used by Federal agencies, to the implementation of Ryan White-funded programs by community-based organizations. We have organized or

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participated in the most important coalitions involved in shaping the CARE Act and CARE Act programs, at the Federal level and in the Washington, D.C. metropolitan area. We also have experience and contacts in the international HIV/AIDS community, especially in Africa.

H. Alexander Robinson is currently the only full-time professional staff member of Robinson & Foster. Robert Foster, Esq., provides legal services and advice to the firm and its clients as needed. Mr. Robinson would be personally responsible for the performance of any professional services for which Robinson & Foster is retained by ONAP. We work with four associates who would be ideal for the type of professional services described in the Request for Quotes, and they would be called upon to the extent that their experience and expertise match with specific requests for services.

Our profiles are briefly set forth below. For more detail, please refer to the enclosed resumes.

H. Alexander Robinson is a member of the Presidential Advisory Council on HIV/AIDS (PACHA), is a current or past member of numerous Boards of Directors for minority and other social service agencies in the Washington, D.C. metropolitan region and around the nation. He has more than fifteen years' experience as a volunteer and professional administrator in nonprofit organizations responding to HIV/AIDS, and has eight years' experience as a policy analyst and lobbyist at the Federal level, including five years as senior Legislative Representative for the American Civil Liberties Union, on issues relating to HIV/AIDS, civil rights, and drug policy.

Mr. Robinson has a through working knowledge of the CARE Act, having served for five years on the Metropolitan Washington HIV Health Services Planning Council (Title I), founding and serving for the past several years on the Board of Directors of the D.C. CARE Consortium (Title II). In addition, Mr. Robinson was the first full-time employee of the Cities Advocating Emergency AIDS Relief (CAEAR). The CAEAR coalition is a national coalition established to advocate for increased funding for Title I and Title III of the CARE Act. As the Administrator of Federal Affairs for the CAEAR Coalition, Mr. Robinson was responsible for the day-to-day management of the Coalition and coordinated its advocacy and grassroots efforts. Mr. Robinson participated in the FY97 reauthorization effort as the Co-Chair of the National Organization Responding to AIDS (NORA) coalition. NORA is a coalition of over 160 AIDS, health care, disability and civil rights organizations.

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While with the Breakthrough Foundation, Mr. Robinson worked closely with its international development program staff who provided technical assistance to individuals and organizations that brought environmental technology to developing countries. Most recently, Mr. Robinson represented PACHA at the 5th African-African American Summit's Special Session on HIV and Africa Economic Development. The Summit and special session were convened by Reverend Dr. Leon Sullivan. The Special Session was designed to advise Dr. Sullivan on his expanded AIDS activities in Africa. Mr. Robinson holds a graduate degree from Stanford University.

Sabrina Sojourner will serve as the senior associate and will support the full scope of work under this contract. Ms. Sojourner is the current Chair of the Washington, D.C. Metropolitan Area Ryan White Planning Council. She is the former District of Columbia Shadow Representative to the U.S. House of Representative, a former Hill staffer and an experienced legislative representative. In addition, Ms. Sojourner is an experienced meeting/group facilitator and motivational speaker.

Bill Zaverello will serve as a legislative associate and will provide legislative tracking and advice regarding the CARE Act and federal international AIDS appropriations. Mr. Zaverello worked for fourteen years as a House legislative staff member and with two congressional committees. Most recently, he served as chief of staff for Rep. Maxine Waters, and he also worked for Rep. Barney Frank on AIDS and other issues.

Michael G. Meyer will serve as the research associate and will perform any quantitative or qualitative analysis necessary to assess the efficacy of the CARE Act in supporting people living with HIV and AIDS. Mr. Meyer has worked and consulted for research and community social services agencies since 1986, with a special emphasis on issues related to HIV/AIDS. He has assisted in the planning and implementation of research and service projects which address HIV/AIDS health education for communities-at-risk, the prevention and treatment of alcohol, tobacco, and other drug abuse, and other issues related to high risk youth.

Keith Boykin will serve as the associate for publications and policy, and provide editorial and other policy development assistance to this project. Mr. Boykin is a Harvard trained lawyer who was a special assistant to President Clinton. He served in the White House during Clinton's first term and was responsible for specialty media, including minority press relations. Mr. Boykin is the author of

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two critically acclaimed books, *Respecting the Soul: Daily Reflections for Black Lesbians and Gays* and *One More River to Cross: Black and Gay in America*.

C. Past Performance References.

HIV/AIDS Bureau, Health Resources and Services Administration

Dr. Katherine Marconi, Ph.D. Director Office of Science and Epidemiology

Dr. Joseph O'Neill, M.P.H. M.D. , (301) 443-1993

Mr. Robinson reviewed data and critiqued written qualitative analysis, and provided HRSA with a summary of findings for a provider and grantee survey. Robinson & Foster will provide technical and editorial assistance regarding the development of the Bureau's Web site.

Common Sense for Drug Policy

Kevin Zeese, President, (703) 354-5694

Robinson & Foster has been retained by the lead funder of Common Sense for Drug Policy to provide ongoing information, recommendations and guidance regarding Congressional legislative and Executive branch proposals related to drug policy.

Research and Policy Reform Center

Carol Bergman, Legislative Director, (202) 624-3170

Robinson & Foster has been retained to develop a legislative and policy office on behalf of the Research and Policy Reform Center and the Open Society Institute. In addition, Mr. Robinson provides legislative advice, consultation regarding federal policies related to needle exchange, medical marijuana, methadone maintenance programs and other public health measures impacted by criminal drug control efforts.

Additional employment references and references for associates will be provided upon request.

D. Price Quote.

We propose to provide services at the hourly rate of \$150.

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Thank you for the opportunity to submit this offer. I look forward to hearing from you soon.

Sincerely,

A handwritten signature in black ink, appearing to read "H. Alexander Robinson". The signature is fluid and cursive, with a large, sweeping initial "H" and "A".

H. Alexander Robinson

Enclosures

ROBINSON & FOSTER, INC.

RESUMES

H. ALEXANDER ROBINSON

CAREER BRIEF

H. Alexander Robinson is a member of the Presidential Advisory Council on HIV/AIDS and a current or past member of numerous Boards of Directors for minority and other social service agencies in the Washington, D.C. metropolitan region and around the nation. Mr. Robinson, who possesses his graduate degree from Stanford University, is a highly skilled administrator with a specialization in drug abuse policy. Broadly familiar with a wide range of health and human services issues, he has specialized in the concerns of African Americans and other racial and ethnic minorities. With particular concern to redressing the problem of HIV/AIDS in communities affected by bias, he has demonstrated strong organizational skills, forming national coalitions, managing staff in complex projects, and overseeing the implementation of tasks in multi-year programs. Mr. Robinson has exceptional written and other communication skills. He was a government relations specialist for the American Civil Liberties Union, chief executive officer for a regional HIV/AIDS prevention program that addressed educational efforts at gay and bisexual African Americans, and Deputy Executive Director for the National Minority AIDS Council.

EDUCATION

- **MBA, Stanford University, Stanford, California, 1979.**
- **B.S., Pennsylvania State University, 1976** (Summa cum laude. Major: Accounting, Political Science).

PROFESSIONAL EXPERIENCE

- **President, Robinson & Foster, Inc., Washington, D.C. (1998 - Present).** Conducts strategic planning, policy analysis, and needs assessments for non-profit organizations and governmental entities. Organizes and conducts focus groups and assists in qualitative data analyses. Drafts research manuscripts.
- **Public Policy Director, Drug Policy Foundation, Washington, D.C. (1998).** As Public Policy Director, developed public policy positions for drug policy reform. Worked directly with the Executive Committee of the Board of Directors to develop the Foundation's public policy agenda. Organized legislative coalition efforts. Undertook policy research activities. Developed policy reports, policy statements, and press releases.
- **Administrator of Federal Affairs, Cities Advocating Emergency AIDS**

Relief Coalition, Washington, D.C. (1996 - 1998). As Administrator, responsible for the day-to-day management of national membership association that represented 49 metropolitan areas that received Ryan White CARE Act HIV/AIDS funding. Duties included development and coordination of professional and grassroots federal budget and appropriation advocacy activities; membership recruitment; meeting/conference planning; drafting and delivering testimony; public relations and communications; and development and management of organization budget.

- **Senior Legislative Representative, American Civil Liberties Union, Washington, D.C. (1991 - 1996).** As the chief lobbyist on civil liberties issues related to people living with HIV/AIDS and other disabilities, gay/lesbian civil rights, and health care reform, worked with members of Congress, the Administration, and the media to achieve legislative and policy aims of the ACLU.
- **Administrator, Inner City AIDS Network, National Capitol Systems, Falls Church, Virginia (1990 - 1991).** As Chief Executive Officer and Program Director for this HIV/AIDS education and prevention program, duties included program development, supervision of staff, budget analysis and management, and fund-raising and public relations.
- **Deputy Executive Director, National Minority AIDS Council, Washington, D.C. (1988 - 1990).** As Deputy Executive Director, served as operations and program manager for national organization established to provide technical assistance to community-based agencies which provide HIV/AIDS education, services, and advocacy for people of color. Duties included supervision of accounting and finances, program development and project supervision, as well as development and supervision of national training program.
- **Operations/Development Director, Lorraine Hansberry Theatre, San Francisco, California (1986 - 1988).** As Operations/Development Director, served as high profile senior-level staff member for nationally recognized regional theater group and production company. Duties included financial management, fund-raising, marketing and promotion, contract and union negotiations, and day-to-day management of 300-seat theater company.
- **Program Officer/Accountant, The Breakthrough Foundation, San Francisco, California (1984 - 1986).** As the administrative coordinator for a national youth-at-risk program based in San Francisco and operating in seven metropolitan areas, duties included management and supervision of volunteer staff for program sites, including coordination of

fund-raising activities, fiscal reporting and logistical support for 10-day wilderness activity and on-site administrative coordination. Also served as accountant for this multi-million dollar non-profit agency. In this role, reported to Director of Finance. Duties included budget monitoring and sole responsibility for all day-to-day accounting functions.

- **Internal Auditor/Accounting Supervisor Trainee, Safeway Stores Incorporated, Richmond, Virginia (1978 - 1982).** In this junior executive-level position with a national retail grocer, conducted internal audits and audit planning. Training included supervision of accounts payable, accounts receivable, EDP, general ledger, and direct delivery sections of divisional accounting office which include 77 stores and 11 warehouses.

SELECTED BOARDS AND COMMISSIONS

- **Delegate to African American Summit, Advisory Special Session on HIV/AIDS and Africa Economic Development (May 1999).**
- **Committee Chair and Member, Presidential Advisory Council on HIV/AIDS (1995 - Present).**
- **Member, Executive Committee, Board of Directors, Whitman-Walker Clinic (1997 - Present).**
- **Member, Metropolitan Washington HIV Health Services Planning Council (1990 - 1995).**
- **Member, District of Columbia Commission of Public Health, AIDS Drug Assistance Program Advisory Committee (1990 - 1995)**
- **Co-Chair, National Organizations Responding to AIDS, Washington, D.C. (1991 - 1996).**

SABRINA SOJOURNER

CAREER BRIEF

Sabrina Sojourner is a senior associate with Robinson & Foster and runs her own private consulting service, Sojourner & Associates. Ms. Sojourner is the former District of Columbia Shadow Representative to the U.S. House of Representatives. She is the current Chair of the Washington, D.C. Metropolitan Washington HIV Health Services Planning Council. As a former staffer of Representative Maxine Waters, Ms. Sojourner is an experienced legislative representative. In addition, over the past several years Ms. Sojourner has developed her expertise as a meeting/group facilitator and motivational speaker.

PROFESSIONAL EXPERIENCE

- **Senior Associate, Robinson & Foster, Inc., Washington, D.C. (1999-Present).**

As Senior Associate, provides support in the areas of public policy, legislative advocacy, meeting planning and facilitation, and organizational development.

- **Organizational Development & Management Consultant, Sojourner & Associates, Washington, D.C. (1981 - Present).**

Works with private and public organizations to develop appropriate means of addressing key social and organizational issues impacting personnel development; strategic planning and Board development; facilitates meetings and discussions for national and community organizations; provide community, organizational and agency training on meeting facilitation, communication, writing, planning; lectures and writes on a number of different issues, including electoral politics, feminism, creativity, diversity and multiculturalism. Provides community workshops.

Provides government relations representation for private organizations and community groups, including development and implementation of legislative briefings, community lobby days coordination and training, legislative and agency testimony preparation, and agency meeting coordination.

- **Shadow Representative, US House of Representatives, District of Columbia (January 2, 1997 - January 1, 1999).**

Mandated to lobby for full Federal representation and self determination

for the residents of the District of Columbia. Lobbied to shape the President's Plan for DC; to beat back excessive riders added to the District of Columbia Appropriations bill; to regain voting rights of the District of Columbia City Council. Educates national and international communities and organizations on the status of the District of Columbia; organized lobby days for citizens; prepared and presented testimony to Congress, the City Council, and other legislative bodies. Provided technical assistance and support to community organizations wanting to lobby Congress.

- **Lecturer, Self-employed, Washington, D.C. (1978 - Present).**

Provides supplemental and keynote addresses at colleges, universities, conferences and special celebrations on a variety of topics and issues, including, but not limited to, diversity and multiculturalism, feminism, women's health, the politics of spirituality.

- **Legislative Aide, Representative Maxine Waters Washington, D.C. (1992 - 1993).**

Tracked events and legislation on a variety of issues, including HIV/AIDS, substance abuse and other health issues; education; police brutality; women's issues; civil and human rights. Met with consultants and lobbyists related to those issues; wrote speeches and press statements, drafted testimony; facilitated confidential information to appropriate channels on a variety of subjects and in a variety of situations; handled press and managed staff.

- **Director, Women of Color and Diversity Programs, National Organization for Women, Washington, D.C. (1991).**

Provided technical assistance to chapters on diversity issues. Lobbied on women's issues as part of a legislative team.

BILL ZAVARELLO

CAREER BRIEF

Bill Zavarello is a legislative associate with Robinson & Foster, and provides legislative tracking and advocacy for the firm and its clients. Mr. Zaverello has over fourteen years of federal legislative staff experience, including serving as personal staff to two Members of Congress and as staff for two Committees in the House of Representatives.

EDUCATION

- **B.A., Northwestern University, Evanston, IL (Economics, 1983)**

PROFESSIONAL EXPERIENCE

- **Self-Employed, Washington, D.C. (1997-Present).**

Citizens Action, Washington, D.C. (September-November 1997). Contracted to manage and represent issues of concern to national members including liability reform, consumer issues, electricity industry restructuring and health care.

Corporation for Enterprise Development, Washington, D.C. (1997-Present). Developed, and coordinated the successful effort to pass the Assets for Independence Act, a national individual development account demonstration project. Organized Hill briefing on Green Dividends program to discourage carbon emissions and encourage investments in personal assets. Coordinated African American outreach efforts.

Bass & Howe, Washington, D.C. (1998-Present). Legislative strategist Oregon Death with Dignity Legal Defense and Education Center, Washington, D.C. Chief strategist to resist federal efforts to overturn Oregon's *Death with Dignity Act*. Assisted in formation of a broad-based coalition which worked to defeat the Lethal Drug Abuse Prevention Act.

National Federation of Community Development Credit Unions, Washington, D.C. (1998-Present). Retained as first Washington representative for 150 member trade association which represents credit unions that serve low-income minority areas. Established a Capitol Hill presence for association.

- **Chief of Staff, Representative Maxine Waters, Washington, D.C. (1987-1997).**

Legislative Aide, Committee on Banking and Financial Services.

- **Legislative Assistant, Representative Barney Frank, Washington, D.C. (1983-1986).**

Legislative Assistant, Committee on Governmental Operations.

MICHAEL G. MEYER

CAREER BRIEF

Michael G. Meyer has worked and consulted for research and community social services agencies since 1986, with a special emphasis on issues related to HIV/AIDS. In this capacity, Mr. Meyer has assisted in the planning and implementation of research and service projects which address HIV/AIDS health education for communities-at-risk; the prevention and treatment of alcohol, tobacco, and other drug abuse; and issues related to high risk youth. His expertise includes a variety of problems which confront groups affected by poverty and bias. Mr. Meyer served as the Principal Investigator for a CSAP-funded substance abuse prevention project for High-risk African American youth in Prince Georges County, Maryland. The project included two add-on grants to develop and continue an HIV prevention and risk reduction effort. From 1992 to 1995, he oversaw a staff of five service providers and a team of three evaluators. He was responsible for all aspects of the scientific and technical direction of the project. Prior to that, he served as an Associate Director of Sasha Bruce Youthwork, the primary crisis intervention center in the District of Columbia for homeless and runaway youth, court-adjudicated young people, and teenaged mothers. At Sasha Bruce, he initiated and developed an effort to provide HIV/AIDS prevention messages to at-risk youth in the streets of Washington. In the late 1980s, Mr. Meyer was the Director of Program Development for the Koba Institute's AIDS Division. At Koba, he assisted in the development of two multi-year studies, funded by NIDA, using ethnography to examine interventions to prevent the transmission of HIV among injecting drug users and their sexual partners. He also developed a variety of prevention materials and conducted programs for the District's HIV/AIDS education programs addressing men who have sex with men, injecting drug users, the general populace, and racial/ethnic minorities. Groups with whom he has worked since 1986 include inner-city African Americans, Native Americans, and undocumented aliens and documented immigrants from Africa, Asia, and Latin America.

EDUCATION

- **B.A., Loyola Marymount University, Los Angeles, California, 1981** (Magna cum laude. Major: History; Minor: Classics).
- **Catholic University of America, Washington, D.C., 1982** (Major: Philosophy).
- **Fordham University, Bronx, New York, 1983** (Major: Philosophy).

PROFESSIONAL EXPERIENCE:

- **Senior Technical Writer, Robinson & Foster, Inc., Washington, D.C.** (1999 - Present). As Senior Technical Writer, assists in the development of position papers, monographs strategic plans, reports, and case studies for public and private sector clients.
- **Senior Research Associate, Toborg Associates, Inc., Landover, Maryland** (1997 - Present). As Senior Research Associate, serves as Project Director for a two-year National Cancer Institute-funded research effort to develop and test culturally relevant health education messages for persons of low socio-economic status in a multi-state area. Served as Deputy Project Director for a contract from the National Institute on Drug Abuse to investigate culturally-appropriate approaches to include minority subjects in drug abuse research.
- **Private Consultant, Washington, D.C.** (1986 - 1997). As a Private Consultant for numerous research, community health, and social services agencies, wrote and edited proposals, monographs strategic plans, and case studies for public and private sector clients. Areas of specific concern include HIV/AIDS health education for injecting drug users, gay and bisexual men, and other persons; education and social services for high-risk youth; the prevention and treatment of alcohol, tobacco, and other drug abuse.
- **Principal Investigator, Washington Area Council on Alcoholism and Drug Abuse (WACADA), Washington, D.C.** (1992 - 1994): As Principal Investigator of a substance abuse prevention project that included substantial HIV/AIDS prevention components for high-risk African American youth in Prince George's County, Maryland, responsible for all aspects of the scientific and technical direction of a project which included a team of five service providers and three evaluators. The Center for Substance Abuse Prevention funded the project.
- **Private Consultant, San Francisco, California** (1991 - 1992): As a Private Consultant, wrote and edited for community-based organizations serving African American, Latino, Asian, and Native American populations in the fields of HIV/AIDS, substance abuse, education, immigration, and the film arts.
- **Development Director, Washington Area Council on Alcoholism and Drug Abuse, Washington, D.C.** (1990 - 1991): As Development Director, developed sources of new sources of funding to support and expand the work of the agency. Activities primarily include grants to federal and local governments, foundations, and corporations.

- **Associate Director, Sasha Bruce Youthwork, Inc., Washington, D.C.** (1988 - 1990): As one of two associate directors of the primary crisis intervention center in the District of Columbia for homeless and runaway youth, court-adjudicated youth, and teenage mothers, assisted in the design and responsible for the development of funding for new and continuing programs, including the agency's three HIV/AIDS education grants. Duties included the execution of reports to public and private funding agencies, publication of the agency's newsletter, and the management of special events.
- **Director of Program Development, Koba Associates, Inc., Washington, D.C.** (1986 - 1988): As Director of Program Development in the AIDS Division, assisted in the technical development of two multi-year studies, funded by NIDA, using the ethnographic research model to examine interventions to prevent the transmission of HIV among injecting drug users. The first of these studies was in Washington, D.C. and examined the processes and outcomes of interventions on a primarily African American population of injecting drug users. The other of them studied Latino injecting drug users in San Diego, California; Laredo, Texas; and San Juan, Puerto Rico. Also developed the theme for the District of Columbia's AIDS/HIV prevention effort and an array of prevention and training materials that addressed gay men, injecting drug users, racial/ethnic minorities, and the general populace. Coordinated proposal development for the AIDS Division.
- **Special Assistant to the President, Aerodyne, Inc., Washington, D.C.** (1985 - 1986): As Special Assistant to the president of this small helicopter manufacturing firm, responsible for the management of the day-to-day activities of the Washington office and representation of the company to clients.
- **Editorial Assistant, Ernest Evans and Associates, Washington, D.C.** (1983 - 1985): As Editorial Assistant in this small lobbying firm, prepared testimony to Congress, reports for clients, and other documentation.

VOLUNTEER EXPERIENCE:

- Conference Coordinator; The American Red Cross Conference on AIDS and I.V. Drug Use, Sheraton-Washington Hotel; February, 1987.
- Conference Coordinator; The American Red Cross Conference on AIDS, Women, Youth, and Children; Hyatt Regency, Capitol Hill; March, 1988.

RECENT PUBLICATIONS AND PRESENTATIONS

- Meyer, M., & Toborg, M. (1999). Principles for the development of culturally congruent health education materials for Appalachia. *Journal of Appalachian Studies*. Manuscript submitted for publication.
- Booth-Butterfield, M., Meyer, M., Toborg, M. & Mande, M. (1999). Content analysis of tobacco prevention and control materials in Appalachia. *National Communications Journal*. Manuscript submitted for publication.
- Booth-Butterfield, M., Meyer, M., Toborg, M., & Mande, M. (1998, November). *An assessment of tobacco prevention and control materials used in the Appalachian mountain region*. Paper presented at the National Communications Conference, New York.
- Meyer, M., & Toborg, M. (1998). *The resourceful researcher: A guide for drug abuse research in African American communities*. Landover, MD: Toborg Associates.
- Meyer, M. (1998). Evaluation report for the Eastern Panhandle Community Traffic Safety Program. Martinsburg, WV: Martinsburg City Police Department.
- Toborg, M., Meyer, M., & Mande, M. (1997). *An assessment of tobacco prevention and control materials used in the Appalachian mountain region* (monograph). Landover, MD: Toborg Associates.
- Toborg, M., Meyer, M., Gouker, E., Gouker, J., Orlando, B., Prillaman, G., & von Philp, L. (1997). *Catalogue of tobacco prevention and control materials used in the Appalachian mountain region*. Landover, MD: Toborg Associates.
- Toborg, M., & Meyer, M. (1996). *Initiatives to prevent the sale and distribution of alcohol and tobacco to youth* (monograph). Landover, MD: Toborg Institute.
- Toborg, M., Prillaman, G., & Meyer, M. (1996). *SummerFest* (monograph). Landover, MD: Toborg Institute.
- Toborg, M., & Meyer, M. (1996). *Involvement of youth by the Community Partnership of Morgan and Berkeley Counties, WV, August 1994 - June 1996* (monograph). Landover, MD: Toborg Institute.
- Meyer, M. (1986). AIDS and the Catholic Church. *America*, 154, 12 -17.

KEITH BOYKIN

CAREER BRIEF

Keith Boykin is an Editor for Robinson & Foster, Inc., and a private consultant. A graduate of Dartmouth and Harvard Law School, Mr. Boykin served President Clinton as his Special Assistant and Director of Specialty Media. In this position, Mr. Boykin coordinated the White House's media strategy for racial and ethnic constituencies. He is also a presidential appointee on an African trade delegation. At Harvard, Mr. Boykin was the general editor of the *Harvard Civil Rights-Civil Liberties Law Review*. In college, he was the editor of *The Dartmouth*, the oldest college newspaper in the United States. Mr. Boykin worked as a press liaison in both the Clinton and Dukakis presidential campaigns. In the Clinton/Gore Campaign, he was the Midwest Press Director. Mr. Boykin is the author of two critically acclaimed books, *Respecting the Soul: Daily Reflections for Black Lesbians and Gays* and *One More River to Cross: Black and Gay in America*.

EDUCATION

- **J.D., Harvard Law School, Cambridge, Massachusetts, 1992.**
- **A.B., Dartmouth College, Hanover, New Hampshire, 1987.**

PROFESSIONAL EXPERIENCE

- **Editor, Robinson & Foster, Inc., Washington, D.C. (1999 - Present).** As Editor, assists in revisions of materials for style and content; assists in the conceptualization and outline of the company's written products; aids in technical writing.
- **Private Consultant, Washington, D.C. (1998 - Present).** As a private consultant, writes speeches for private and governmental clients; conducts diversity training for corporations, colleges, and non-profits; lectures at colleges on issues of race, sexual orientation, politics, and the media; and serves as an appointee of President Clinton on a trade delegation to Africa.
- **Executive Director, National Black Lesbian & Gay Forum, Washington, D.C. (1995 - 1998).** As Executive Director, managed national non-profit advocacy organization; lobbied members of Congress, the President, and Cabinet members; doubled organization budget and increased its public profile; and built policy coalitions between civil rights organizations.
- **Special Assistant to the President and Director of Specialty Media,**

The White House, Washington, D.C. (1993 - 1995). As Special Assistant to the President of the United States, coordinated White House media for racial and ethnic constituencies, directed press operations for trade media, advised the President on options regarding gays in the military, and drafted presidential statements on sexual orientation issues.

- **Midwest Press Director, Clinton/Gore Presidential Campaign, Little Rock, Arkansas** (1992). As Midwest Press Director, coordinated media activities of press secretaries in seven Midwestern states and served as media liaison between field staff and campaign headquarters.
- **Summer Associate, McCutchen, Doyle, Brown & Enersen, San Francisco, California** (1991 - 1992). As a Summer Associate, drafted client memoranda on CERCLA and the Endangered Species Act and researched case law for environmental and litigation clients. Hired as an Associate of the firm in 1992.
- **Summer Associate, Patton, Boggs & Blow, Washington, D.C.** (1991). As a Summer Associates, drafted client memoranda and conducted litigation research for attorneys. Offered permanent Associate position.
- **School Teacher, DeKalb County Board of Education, Atlanta, Georgia.** As a Teacher, taught eighth grade social studies and 10th grade English grammar.
- **Press Aide, Dukakis/Bentsen Presidential Campaign, Boston, Massachusetts** (1987 - 1988). As a Press Aide, helped to manage media as a part of the nominee's traveling entourage. Served as state press secretary in Georgia and Ohio during the 1988 primaries.

SELECTED LECTURES AND PRESENTATIONS

U.S. Congressional Black Caucus, "Black Political Power," September 17, 1998.

U.S. Patent & Trademark Office, "Gay Issues Panel," June 23, 1998.

Harvard Law School, "Race Issues in Law and Careers," April 3, 1998

U.S. Peace Corps, "Gays and Lesbians in Zimbabwe," November 18, 1997

U.S. State Department, "Gays and Lesbians in Zimbabwe," October 7, 1997

PUBLICATIONS

Boykin, K. (1996). *One more river to cross: Black and gay in America*. New York:

Anchor Books/Doubleday.

Boykin, K. (1999). *Respecting the soul: Daily reflections for Black lesbians and gays*.
New York: Avon Books.

Robinson & Foster, Inc.
771 3rd Street, NE
Washington, D.C. 20002



Kathleen E. O'Halloran
Contracting Officer
EOP/Office of Administration
725 17th Street, NW
New Executive Office Building
Room 5002

Hand Delivered G1



MEMORANDUM FOR KATHLEEN O'HALLORAN

From: Todd A. Summers
Deputy Director
Office of National AIDS Policy
(202) 456-2437

Date: June 2, 1999

Subject: RFQ #99-OPD/ONAP-01

Thank you for your help in soliciting responses to the above-referenced request for quotations involving consulting services for our office. I have reviewed the two submissions and have the following comments.

Scope of Work

The proposal from Robinson and Foster did not address the activities related to children and AIDS orphans. This is an important component of the work, at least as important as the activities related to reauthorization of the CARE Act.

Price

The price quoted by Robinson and Foster was nearly three times that of Michael Iskowitz, who quoted the federal maximum for personal consulting services. In addition, no distinction is made as to billing rates for any of the individuals referenced in the Robinson and Foster submission (leaving at least the impression that any and all services would be billed at the same rate).

Qualifications

I believe that the qualifications of Michael Iskowitz are superior for both work components (children/orphans and CARE Act). Further, I know three of the four "sub-consultants" referenced in the Robinson and Foster submission and am not sure that they would be the best qualified for this particular work.

Recommendation

Based on the above considerations, I recommend that we select Michael Iskowitz.

Caveats

For the record, I know both of the lead principals personally. However, I believe that these comments are objective and are based on the submissions. Also, Sandra Thurman, ONAP's Director, has not seen the submissions and has not participated in this review.



Todd A. Summers

06/02/99 07:21:58 PM

.....

Record Type: Record

To: OHALLORAN_K@A1@CD@VAXGTWY

cc:

Subject: Comments on submissions

As promised...



OHalloran.do

REQUEST FOR QUOTES #99-OPD/ONAP-01
RESPONSES DUE TO THE CONTRACTING OFFICER (SEE BELOW)
BY CLOSE OF BUSINESS, THURSDAY, MAY 6, 1999

The Office of National AIDS Policy (ONAP) advises the President of the United States on the status of the HIV/AIDS epidemic, recommends steps to improve Federal government's response, and facilitates communication with the community on Administration activities and policies.

STATEMENT OF WORK

ONAP will contract for the following professional services (on an intermittent/as-needed basis) in support of its overall mission of supporting the President:

- 1) Provide guidance on issues related to the reauthorization of the Ryan White CARE Act, a \$1.5 billion program that supports a broad range of care and services for people living with HIV and AIDS. The CARE Act is scheduled to be reauthorized by Congress during its current session, and the Office of National AIDS Policy will play an important role in coordinating the Administration's position on this legislation. Issues will include, but are not limited to:
 - a) Analyze the efficacy of the program in supporting people living with HIV and AIDS, particularly people of color;
 - b) Assess recommendations for changing the CARE Act to improve its ability to assure fair and effective support for all communities and all areas of the country;
 - c) Prepare briefings for ONAP in response to concerns raised by members of the community, Congress, or the Administration during the reauthorization process; and
 - d) Track the progress of any legislation providing for or affecting the reauthorization of the CARE Act, including anticipated amendments on eligibility for services, changes in funding formulas, modifications to programs, etc.
- 2) Provide guidance and support for ONAP on its efforts to improve this nation's response to the international pandemic of HIV/AIDS particularly as it relates to children. This will include, but not be limited to:
 - a) Provide briefing information on international AIDS orphan issues;
 - b) Assist in identifying opportunities to establish or enhance public/private partnerships to address international HIV/AIDS issues affecting

- children;
- c) Prepare briefing materials for ONAP in support of its interactions with representatives of other nations, members of this Administration, Congress, and private organizations;
 - d) Assist in assessing Congressional actions that affect, positively or negatively, on the international pandemic and children; and
 - e) Assist in drafting speeches and other communication materials for ONAP that relate to the international pandemic and children.

CONTRACT PERFORMANCE PERIOD

The contract period of performance shall be for a period of 12 months from date of award . Services will be provided on an intermittent basis as requested by ONAP.

TYPE OF CONTRACT

This is to be a level-of-effort contract for professional services as needs are identified. Contractor to work at set hourly rate. A maximum not-to-exceed amount will be set at the time of award.

DELIVERY SCHEDULE

ONAP will identify requirements and specific deliverables as they arise; delivery schedule/ required completion dates will be negotiated by ONAP with the contractor.

EVALUATION CRITERIA FOR OFFERORS

Technical qualifications:

- 1) Experience in the development of national HIV/AIDS policy and legislation.
- 2) Knowledge of the legislative process for authorization and appropriation of HIV/AIDS programs.
- 3) Educational background.

Past performance

- 1) Demonstrated success in performing work similar to that described in the Statement of Work.
- 2) Demonstrated success in working with individuals prominent in HIV/AIDS policy issues.

BASIS FOR AWARD: Award will be made to the offeror determined to represent the best value to the government, giving appropriate consideration to the offeror's past performance,

credentials and price.

CONTENT OF QUOTE/DOCUMENTATION TO SUPPORT EVALUATION: Offerors must be submitted to the Contracting Officer by the required due date:

Kathleen E. O'Halloran, Contracting Officer
EOP/Office of Administration
725 17th Street, NW, NEOB Rm 5002
Washington, DC 20502
fax # (202) 395-3982 - fax responses are acceptable
Hand-carried responses should cite the above address, and may be presented to personnel in G-1 of the NEOB.

Phone #(202) 395-7671

Quotes/Responses should include the following:

- a. Availability to perform during the cited period. If an offeror is not available, please notify the Contracting Officer, Kathleen O'Halloran, in writing by the response due date - no further information will be necessary.
- b. Written documentation detailing and demonstrating offeror's technical qualifications and past performance of similar services and the quality of those services. This response should not exceed 3 typewritten single-spaced 8 ½ x 11" pages. In addition, please submit the resume of the person(s) proposed to perform the requested services.
- c. Past Performance References - please include name of institution, contact person and phone number for whom similar work has been performed (no more than 2 references - most recently performed).
- d. Price Quote - offeror shall quote an hourly rate for the services requested in the above Statement of Work (SOW).

PAYMENT TERMS

Contractor may invoice once every month for actual hours worked, as supported by a written summary of activities performed.

PURCHASE ORDER CLAUSES

52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998) - This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

<http://www.arnet.gov/far/>
<http://farsite.hill.af.mil/vffar1.htm>

FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES

52.213-4 Terms and Conditions--Simplified Acquisitions (Other Than Commercial Items) (FEB 1998)

52.223-6 Drug-Free Workplace (JAN 1997)

Additional Clauses and Provisions

Potential Conflicts of Interest - Offerors responding to this competitive solicitation have an affirmative obligation to disclose to the Contracting Officer any personal or business relationship with Government personnel, or financial interests, which could present the appearance of an existing or potential conflict of interest. Failure to do so, if such becomes known by other means, could result in a determination of non-responsibility prior to award, or termination of contract after award.

Advertising of Award -The Contractor agrees not to refer to awards in commercial advertising in such a manner as to state or imply that the Contractor is endorsed or preferred by the Federal Government, or is considered by the Government to be superior to other firms. Further, the Contractor shall not refer to any contract with the Executive Office of the President without the express written approval of the Contracting Officer.

Restrictions - Contractor will at no time purport or represent themselves as representatives of ONAP or the Administration. Contractor will not establish policy but instead will provide information and professional recommendations to support the development of policy and positions by ONAP.

Government Facilities - Performance of work under this contract shall be at the contractor's facilities. However, ONAP may request that contractor participate in discussions and meetings with the ONAP staff as necessary at the ONAP offices or other government offices.

E X E C U T I V E O F F I C E O F T H E P R E S I D E N T

02-Sep-1997 12:38pm

TO: FAX (61655,Ashley Raines)

FROM: Kathleen E. O'Halloran
Office of Administration, GS

SUBJECT: Guidance on Writing a SOW & Sole Source Justification

Ashley -

I'm providing a copy of some guidance on writing SOWs - that'll help you cover all the bases except - don't think that it addresses development/rationale for Government estimate - which you should include. Most contracts/PQs are payable upon completion, but we sometimes we can accommodate partial payment or other special terms - we can discuss this further.

Also - am sending an outline for a justification for other than full and open competition (sole source justification). I think you've completed one of these before.....?

Hope this helps! I'll be glad to review a draft and work with you to fine tune it.

Kathy OHX57671

3. Applicable make, model, or catalog number (including identification of the catalog) for each brand name product referenced;

4. Name and address of manufacturer, producer, or distributor of each brand name product referenced; and

5. A list of all other brand name items known to meet the requirement.

To prevent difficulties in determining whether an offered product is an "equal," particular care must be taken in developing this purchase description.

"Specific make and model" purchase descriptions have been determined to be other than fully and openly competitive regardless of the number of sources to be solicited. This type of purchase description requires synopsis, additional justification, and should only be used when no other method is feasible.

→ Statement of Work

A Statement of Work (SOW) is most frequently developed for a professional service requirement. The four basic questions that must be answered in any SOW are:

1. What needs to be done?
2. When (and sometimes where and how) should it be done?
3. What should the final output be?
4. How will the final output be inspected/accepted?

Unless a particular topic is not relevant to the specific requirement, a SOW should address these topics:

- o Goal of the contract - the general objectives should be briefly outlined. This is often considered the scope of the contracted activity.

- o Background - explain the general program/project being supported in order to place the buy in the context of the overall program. (Should not exceed 2 paragraphs.)

- o Location of project.

- o Government furnished property, material, or service - indicate the nature and extent of Government furnished items to be provided to the contractor, complete with description, estimated value, point of delivery, and date.

o Method to be used - generally the end requirement to be met is specified and the choice of methodology is left to the offeror. If it is essential that certain methods be used, they must be specified.

o Specific requirements - specific steps or activities to be accomplished must be described in sufficient detail to permit preparation of thorough proposals. Generally, the following should be included:

- Phases (may contain go, no go decision points at end of each)

- Tasks (may contain go, no go decision points)

- Subtasks

- Detailed activities, include any task inter-dependencies (i.e., Task 3 - use the results of Task 1 to determine the size of the sample to be used in conducting the survey.)

- Project management tasks: maintain budgets and schedules within stated limits, identify and resolve technical and management problems, maintain communication with all parties, etc.

- Reporting tasks.

o Deliverable - specific material to be delivered to the Government. Clearly identify when (including timeframe) deliverables are to be approved by the Government.

o Time schedule - when required, it should be listed in the chronological order of specific tasks. Schedules should usually be in terms of elapsed days after award not specific calendar dates.

o Inspection and acceptance - the manner in which the Government will determine whether contract requirements have been met must be clearly set forth.

o Technical exhibits - should either be appended or the location and contact point provided.

Do's and Don'ts of Specification Writing

Do understand the general rule of contract interpretation. Ambiguity is your greatest enemy. If the contractor's interpretation is reasonable, it generally will prevail regardless of the Government's intended meaning. Specifically...

- o Do write specifications in short, concise sentences using active verbs. Sentences with compound clauses should be converted into separate sentences.

- o Do avoid unfamiliar words, colloquialisms, and words having more than one meaning. Define technical and trade expressions. Use short words which convey clear meanings: "use" for "utilization," "change" for "modification," "first" for "initial," "best" for "optimum," and "show" for "demonstrate."

- o Do replace phrases with single words. Use "if" instead of "in the event that," use "because" for "due to the fact that," use "is" instead of "have proved itself to be," and use "now" for "at the present time."

- o Do use "shall" to express a binding provision. "The contractor shall furnish magnetic tape..."

- o Do use "will" to express simple futurity. "The Government will supply the course outline."

- o Do use "should" and "may" to express nonmandatory provisions. "The connector should have polarized blades." (These two words are seldom necessary in a well written specification.)

- o Do use active rather than passive voice, i.e., "The contractor shall provide personnel" instead of "Personnel shall be provided by the contractor."

- o Do limit the use of abbreviations and acronyms to those in common usage, and introduce each one by giving the full title followed by the abbreviation or acronym in parentheses. A separate listing may be helpful.

- o Do be consistent in the use of words and phrases. Don't interchange terms such as "workbook," "manual," and "handbook"; or, "data collection," "field sampling," and "survey."

- o Do use either the singular or plural form consistently throughout the specification: tape and tapes, analysis and analyses.

- o Don't use "statement of work" in one reference and "schedule of articles" in another when you are referring to the same document.

- o Don't use open-ended requirements such as "as directed," "subject to approval," or "satisfactory to." Define who is responsible.

- o Don't use catch-all phrases such as "good industry practices," "high quality," and "suitable for the purpose intended."

- o Don't use and/or. Use "or" to indicate an alternative. Use "and" to indicate additional requirements.

JUSTIFICATION FOR OTHER THAN FULL AND OPEN COMPETITION

The content of the Justification for Other Than Full and Open Competition (so entitled) is provided in Federal Acquisition Regulation (FAR) 6.303-2. In general, a brief but concise justification must be provided for the purchase order file; it must provide the following information, ideally in 2-3 paragraphs:

- identification of the requesting office,
- general description of the requirement (including background and facts surrounding the need for the goods/services),
- documentation supporting the determination that only one source can supply the needed goods/services and no other goods/services will meet the Government's needs,
- statement addressing the actions to be taken by the Agency to avoid further sole source actions,
- any other pertinent information, and
- certification from the requesting technical/program official that the justification is complete and accurate.

EXECUTIVE OFFICE OF THE PRESIDENT

04-Sep-1997 04:24pm

TO: FAX (61655,Ashley Raines)
FROM: Kathleen E. O'Halloran
Office of Administration, GS

SUBJECT: Sample SOW - Consulting/Professional Service Contract

Hi Ashley

For the dollar figure I think you're talking about - this would be a good example.

-Please note that OSTP has specific authority in their appropriation language to pay more for consultants - the max. for most agencies is the 10th step of a GS-15.

Hope this helps.

Kathy OHX57671

Check Early
[56206]

Statement of Work

The Office of Science and Technology Policy (OSTP) has statutory responsibility to advise the President on policies in science and technology that will advance the national and international objectives of the United States. OSTP's National Security and International Affairs Division is responsible for analysis, development, advocacy, and implementation of Presidential policy on various scientific issues related to national security and international affairs.

OSTP will contract with _____ to prepare a report supporting OSTP's requirement to study the costs and benefits of establishing a global network of surveillance and response to terrorism or other criminal use of biological agents against people or other forms of life in the U.S. or any foreign country. Specifically, the report shall

1. Describe how the missions of detecting and responding to deliberate attack with biological agents differ from the missions of detecting and responding to naturally occurring outbreaks of emerging infectious diseases (EIDs).
2. Concentrate on threats to human health, and shall only address threats to other forms of life to the extent that resources permit.
3. Describe how the domestic and international surveillance system that is in place or is being established to detect EIDs should be modified to improve its ability to detect the use of biological agents. The report shall describe the costs and benefits of implementing such modification, including the effects they would have on the original mission of EID surveillance.
4. Make recommendations to OSTP concerning which modifications should be implemented and how to go about implementing them.
5. To the extent possible, draw upon the ongoing work of the Institute of Medicine on detection, protection, and treatment research and development needs for improved civilian response to the health and medical consequences of chemical and biological agents incidents, and other relevant ongoing activities.

Timeline:

- 1) By September 30, 1997, contractor shall deliver a detailed outline of the report.
- 2) By November 30, 1997, contractor shall deliver a first draft of the report.
- 3) By December 15, 1997, OSTP shall return the draft to the contractor with comments.
- 4) By December 31, 1997, contractor shall deliver a revised report to OSTP.

W/C
MAY
15-15-15

The period of performance is not to exceed 17 days at \$385.00 per day for a total price of \$6,545.00

The contractor is authorized to make three round-trips of four days each from _____ to Washington, D.C., at a cost not to exceed \$3,310.00.

The contractor is also authorized funds not to exceed \$145.00 for miscellaneous expenses (copying, faxing, long distance telephone calls, etc.).

The contract will be completed for a firm fixed price of \$6,545.00 plus expenses not to exceed \$3,455.00 for a total contract price not to exceed \$10,000. The contractor will invoice OSTP on a biweekly basis, separating the cost of work performed, travel expenses and miscellaneous expenses. Expenses claimed shall be itemized and receipts provided.

The price is fair and reasonable under local market conditions.

Proposal?
MAY 13
5/17/15

Sole Source Justification
Attached

Memorandum for:

DSAIC- Presidential Protection Division
White House Security Branch
Room 23, OEOB

Subject :

Work Order Request

Date:

Length of Work Order

1 - 4 Days

5 or more Days

Starting Date and Time

Termination Date and Time:

Contact Person:

Telephone number:

Room number:

Type of Work being done:

Location of Work being done:

Company Name:

Company telephone number:

Company contact person:

Workers Name:

Workers Name:

Workers Date of Birth:

Workers Date of Birth:

Workers Soc. Sec. Number:

Workers SSN:

Workers Name:

Workers Name:

Workers Date of Birth:

Workers Date of Birth:

Workers Soc. Sec. Number:

Workers SSN:

Will worker(s) be utilized in the future?

Yes

No

Submit form to United States Secret Service, Presidential Protection Division, White House Security Branch, Room 23 Old Executive Office Building, Telephone 395-4259, Fax 202/633-0911. After normal business hours, submit form to WAVES Room 562 OEOB, Fax: 395-5349.

Memorandum for:

**DSAIC- Presidential Protection Division
White House Security Branch
Room 23, OEOB**

Subject

:

Work Order Request

Date:

Length of Work Order:

(1 - 4 Days)

5 or more Days

Starting Date and Time:

Termination Date and Time:

Contact Person:

Telephone number:

Room number:

Type of Work being done:

Location of Work being done:

Company Name:

Company telephone number:

Company contact person:

Workers Name:

Workers Name:

Workers Date of Birth:

Workers Date of Birth:

Workers Soc. Sec. Number:

Workers SSN:

Workers Name:

Workers Name:

Workers Date of Birth:

Workers Date of Birth:

Workers Soc. Sec. Number:

Workers SSN:

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Yes

No

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Memorandum for: DSAIC- Presidential Protection Division
White House Security Branch
Room 23, OEOb

Subject : Work Order Request **Date:**

Length of Work Order: 1 - 4 Days 5 or more Days

Starting Date and Time:

Termination Date and Time:

Contact Person:

Telephone number:

Room number:

Type of Work being done:

Location of Work being done:

Company Name:

Company telephone number:

Company contact person:

Workers Name:

Workers Name:

Workers Date of Birth:

Workers Date of Birth:

Workers Soc. Sec. Number:

Workers SSN:

Workers Name:

Workers Name:

Workers Date of Birth:

Workers Date of Birth:

Workers Soc. Sec. Number:

Workers SSN:

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Yes

No

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