

FOIA MARKER

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Collection/Record Group: Clinton Presidential Records
Subgroup/Office of Origin: National AIDS Policy Office
Series/Staff Member: Sandra Thurman
Subseries:

OA/ID Number: 40015
FolderID:

Folder Title:
Admin - Contractors - Strategic Planning Group, Inc.

Stack:	Row:	Section:	Shelf:	Position:
S	66	6	1	1

To Todd

Date 11/17/97 Time 1055

WHILE YOU WERE OUT

M Kathy O'Halloran

of _____

Phone 395-7671

Area Code	Number	Extension
TELEPHONED	☒	PLEASE CALL ☒
CALLED TO SEE YOU	☐	WILL CALL AGAIN ☐
WANTS TO SEE YOU	☐	URGENT ☐

☐ RETURNED YOUR CALL ☐

Message _____

Operator Jen



AMPAD
EFFICIENCY®

23-023

CARBONLESS



Catherine S. Anderson
11/14/97 10:51:15 AM

.....

Record Type: Record

To: Todd A. Summers/OPD/EOP

cc: Ashley L. Raines/OA/EOP, OHALLORAN_K @ A1 @ CD @ LNGTWY

Subject: Strategic Planning Group, Inc.

I have been trying to reach you to discuss the Request for Consultant that you submitted through Ashley Raines. In order to proceed, I need additional information. First, is Strategic Planning Group a small business? Under the Federal Acquisition Regulation (FAR), all acquisitions between \$2500 and \$100,000 are reserved exclusively for small businesses. Therefore, if there are small businesses that could perform this type of service, Strategic Planning Group may not be used. Given that these services are not of a highly technical nature, it is my guess that there many small businesses that could perform this work for you.

We also need a Statement of Work, which describes, in detail, the work required under the contract. Procurement (Kathy O'Halloran) should be able to provide you with samples. Once we have received the SOW, we can compete this for you. Given the low dollar value, simplified acquisition procedures may be used, so this can be accomplished quickly in order to meet your schedule. We may consider factors in addition to Price (technical merit, past performance, etc.), and the documentation requirements are limited. At a minimum, we should request oral quotes from three or more companies. I would also recommend that we ask for quotes on a firm, fixed price basis.

Of course, Procurement and I will be available to assist you in any way that we can. The sooner we receive the statement of work, the sooner we can get you on contract.

Call me with any questions that you might have.

Regards,

Kate Anderson



Todd A. Summers
11/20/97 01:27:18 PM

.....

Record Type: Record

To: OHALLORAN_K @ A1 @ CD @ LNGTWY

cc:

Subject: Re: AIDS Contract 

Per your questions in the e-mail of 11/17:

1. SPGI is a small, women-owned business (confirmed by your conversation with Ira Sockowitz)
2. The statement of work has been revised as suggested by you and counsel.
3. The start date should be 12/1/97 and should end four weeks from that date (12/26/97)
4. Other than the work identified in the statement of work, the deliverables on the project will be (a) a fully completed itinerary for Thurman's trip to South Africa and (2) a written report on the quality of the logistical support for the trip, including suggestions for improving similar upcoming trips.
5. I think that we will have to get quotations from other vendors to support the selection. How is that done? Do you do that? Do we? Do you want me to get names of some others that might do this?

I'll respond to any other concerns in the 11/18 memo as soon as you send me the text (it came through garbled).

Thanks!

Todd



OHALLORAN_K @ A1

11/17/97 11:10:00 AM

Record Type: Record

To: Todd A. Summers, Ashley L. Raines

cc: Catherine S. Anderson, HELMS_R @ A1@CD@LNGTWY .

Subject: RE: Strategic Planning Group, Inc.

Ashley/Todd -

The small business size standard for this type of service - annual receipts not to exceed \$5 Million. I called SPGI and spoke w/Ira Sockowitz - he advised me that the firm is not only small but also minority-owned.

As to the statement of work - as Kate said, we need more detail - what tasks? I think if you focus on defining and expanding on the term "advance support," you'll get to the crux of the matter.

Know you've stated 4 weeks but need to know the required start date and completion date.

As to deliverables - it's best to have some tangibles - possible final delivery could include a checklist and/or overview of the process....???

Also, as Kate said, competition is required for any requirement over \$2,500. If this is truly the only source that can provide this service, a separate Sole Source Justification is needed. This justification would have to be very specific as to the unique qualifications that this firm has - that are essential to the successful completion of this task - and why no other firm can perform the services. (Note that this document is subject to release under the Freedom of Information Act and needs to be able to withstand close scrutiny.) The capability statement that was provided with the package can be used to help support the sole source justification but it does not, by its nature, provide the specific rationale for sole source that must be documented in the justification.

Hope this helps. Please give me a call and we can discuss further.

Kathy OHX57671

11/17/97 17:57

11/17/97 15:41 FAX

+++ OA/GC

From: James Day / Ira Sockowitz To: Todd Summers

Date: 11/17/97 Time: 1:48:00 PM

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002/002

Page 2 of

n. 1
Summers
africa job
wpd

Description of Work:

Provide advance support for a trip by ONAP Director Sandra Thurman to South Africa, in conjunction with a visit by the Secretary of State. Such support will include, but will not be limited to:

1. all necessary logistical arrangements, such as
 - being met, greeted and expedited through customs at the airport
 - arranging for all transfers and transportation needs
 - arranging for accommodations
 - arranging for all business office needs (fax, phone, copiers, etc)
2. arranging for and facilitating speaking and public engagements for the Director
 - working with U.S.- and Embassy-based staff to identify appropriate opportunities for public appearances by the Director
 - ~~assisting in~~ choosing venues to ensure appropriate themes and message are conveyed
 - ~~assisting in~~ choosing appropriate audiences to ensure appropriate themes and message are conveyed
 - ~~assisting in~~ obtaining and coordinating media for these events
3. arranging for and facilitating private meetings with appropriate people and organizations for the Director
 - working with U.S.- and Embassy-based staff to identify appropriate opportunities for private meetings with the Director
 - ~~assisting in the selection of~~ choosing meeting participants to ensure the Director's policy objectives are met
4. Coordinating with the Embassy and Secretary of State's Advance Staff
 - ensure scheduling matters are coordinated to avoid conflicts with the Secretary of State
 - coordinating with Embassy and Advance Staff for movements, credentials, and other elements of the Director's activities while on a trip with the Secretary of State

Provide training to ONAP Deputy Director Todd Summers in international executive advance support. Summers requires the training so that he can provide further support to the ONAP Director on two additional trips to South Africa. This training will include gaining an understanding of logistics and their requirements, understanding the nature of Embassy personnel and their functions, how to utilize the resources of an Embassy and the host country's government, and the role of "advancing" a principal.

THE WHITE HOUSE
WASHINGTON

MEMORANDUM FOR ASHLEY RAINES, KATHY O'HALLORAN

From: Todd Summers
Deputy Director
Office of National AIDS Policy
(202) 632-1090

Date: November 20, 1997

Re: SPGI Contract

Here is the Proposed Description of Work for Strategic Planning Group, Inc. (SPGI):

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1. all necessary logistical arrangements, such as
 - being met, greeted and expedited through customs at the airport
 - arranging for all transfers and transportation needs
 - arranging for accommodations
 - arranging for all business office needs (fax, phone, copiers, etc.)
2. arranging for and facilitating speaking and public engagements for the Director
 - working with U.S.- and Embassy-based staff to identify appropriate opportunities for public appearances by the Director
 - assisting in choosing venues to ensure appropriate themes and message are conveyed
 - assisting in choosing appropriate audiences to ensure appropriate themes and message are conveyed
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Fixed to Ashley
Raines + Kathy
O'Halloran on
11/17/97

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OHALLORAN_K @ A1

11/17/97 11:10:00 AM

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cc: Catherine S. Anderson, HELMS_R @ A1@CD@LNGTWY
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Regards,

Kate Anderson

MEMORANDUM FOR ASHLEY RAINES

From: Todd Summers
Deputy Director
Office of National AIDS Policy
(202) 632-1090

DRAFT

Date: November 3, 1997

Re: Request for Consultant - Strategic Planning Group, Inc.

DESCRIPTION OF WORK

The Office of National AIDS Policy (ONAP) seeks to engage the consulting services of Strategic Planning Group, Inc. (SPGI), a firm specializing in event management, public relations, and executive support. SPGI will be engaged to complete the following work items:

1. Provide advance support for a trip by ONAP Director Sandra Thurman to South Africa, in conjunction with a visit by the Secretary of State.
2. Provide training to ONAP Deputy Director Todd Summers in international executive advance support. Summers requires the training so that he can provide further support to the ONAP Director on two additional trips to South Africa.

SPGI will not be involved in making any policy decisions, but will be asked to assist in assessing, analyzing, and recommending policy actions.

JUSTIFICATION FOR NON-COMPETITIVE AWARD

The trip by the ONAP Director has been scheduled for the second week of December, which does not provide adequate time for a competitive award process. This trip could not have been firmly scheduled farther in advance because the ONAP Director had to remain in Washington until the Congress completed its work on the FY98 Appropriations bill for Labor, Health, and Human Services.

QUALIFICATIONS OF PROPOSED CONTRACTOR

A complete description of SPGI's experience is attached. ONAP and SPGI intend that the services of SPGI will be provided by Ira Sockowitz, a principal of the firm. Mr. Sockowitz has provided international advance support for Secretary of Commerce Ronald Brown, as well as other senior staff members of the Department of Commerce. Mr. Sockowitz has also provided domestic advance support for the Vice President.

NON-REPLACEMENT OF FEDERAL EMPLOYEE

This short-term contract will not involve the replacement of any federal employee. There is no

federal employee with the same level of expertise to do the work proposed. ONAP Deputy Director Todd Summers will accompany SPGI but has no experience in providing the requisite support.

TERMS OF PROPOSED AGREEMENT

The contract will last for four weeks.

The proposed rate of pay is \$XX per hour, and the total amount expended will not exceed \$7,500. This rate is substantially less than the "going rate" for similar work by a similarly qualified individual (ONAP believes that any adequate market analysis will support this conclusion), and is also substantially less than the current rate being paid to SPGI by most of its public and private clients.

An additional budget allocation of \$5,000 is reserved for travel and related expenses incurred by the Contractor in performance of this work (ONAP anticipates that Mr. Sockowitz will accompany Mr. Summers and Ms. Thurman for a two week trip to South Africa beginning on or about December 3rd, 1997).

TIME LINE

1. Within 5 days of contract execution, Contractor shall deliver a workplan for completing all tasks called for in the contract.
2. By December 3rd, Contractor shall have prepared a preliminary plan and itinerary for the upcoming trip of Ms. Thurman to South Africa (to begin on or about December 10th, 1997).
3. On or about December 3rd, Contractor shall accompany Mr. Summers to South Africa and begin to finalize the travel itinerary and arrangements for Ms. Thurman.
4. By the arrival date of Ms. Thurman in South Africa, Contractor will have completed all travel arrangements and a complete itinerary.

Strategic Planning Group, Inc.

1747 Pennsylvania avenue
Suite 300
Washington, D.C. 20006

Telephone: 202-466-7700
Telecopier: 202-466-7772
E-Mail: MAIL@SPGWEB.COM

ABOUT THE COMPANY

Strategic Planning Group, Inc. (SPG), is a Washington D.C.-based Special Event and Executive Support company that integrates comprehensive event management, public relations and government affairs services. Founded by two former well-placed U.S. government officials, *SPG* designs packages of integrated services that systematically execute our strategic goals - on schedule and on budget. *SPG* has the flexibility to respond quickly, decisively and effectively to your mission-critical needs, with full respect for information sensitivity and protocol.

Strategic Planning Group knows that expert planning, powerful strategic alliances and timely access to resources are fundamental to successful business. The global business community can now find that unique blend of expertise in government affairs and international trade within a single source: *SPG*.

SPG's DIRECTORS

SPG's Directors' cache of political and business experience enables them to clearly delineate their clients' agendas and meet their objectives in any arena with the highest caliber of professionalism.

James Day has successfully mixed the worlds of politics and business, with diverse projects such as representing transportation interests in Washington, consulting to Congressional as well as state and local candidates and advising producers of jazz festivals. James served as a Senior Staff Member to Transportation Secretary Federico Pena and as Special Assistant to Rodney Slater, the current Secretary of Transportation. At the 1992 Democratic National Convention, James was the Deputy Director of V.I.P. Operations. James went on to be the Director of Advance for Vice Presidential Candidate Al Gore, where he was responsible for training and managing the national

advance staff during the 1992 Presidential campaign. James has also planned and managed numerous visits of foreign dignitaries, including the Papal visit to Denver, and has coordinated various elements of large international conferences, such as the G-7 Summit and the Summit of the Americas.

Ira Sockowitz has worked as a counselor, negotiator, advocate and planner of events to maximize the public-private partnership between government and business. As Special Counsel under the late-Secretary of Commerce Ron Brown, Ira traveled extensively overseas, met with Heads of State and Ministers of foreign governments, advocated for U.S. business interests, and represented the U.S. in the logistical preparation of international conferences, multilateral meetings and State Visits. At the 1996 Democratic National Convention, Ira was the Venue Manager for the Office of Vice President, where he coordinated the use of facilities by the Vice President, his family and his staff. Ira also planned and operated the on-site hospitality area for the guests of both the President and Vice President. Ira has comprehensive experience in the legislative arena, having been a lobbyist, a Member's counsel, and manager of a legislative staff at the New York State Legislature as well as having served as a Legislative Counsel for New York City's Office of Management and Budget.

SPECIAL EVENT PLANNING -- ANTICIPATING EVERY DETAIL

Having planned and managed events for the Pope, the White House, Cabinet Secretaries, corporations and associations, *Strategic Planning Group* is experienced at organizing events of any size with a level of logistical sophistication that ensures unqualified success from conception to completion. Whether in the US or abroad, we serve as the nerve center that facilitates every detail of all event coordination, be it a meeting, seminar, convention, gala or trade show. By working with you to understand your target audience and strategic objectives, *SPG* ensures that your event is "on message."

With our extensive network of suppliers, we guarantee you the best technical and material support available to suit the occasion and enhance your event's effectiveness. *SPG* will carefully select:

- an appropriate locale
- catering, from coffee service to lavish banquets
- promotional materials (such as signs, banners, corporate or product displays)
- professional lighting, sound and electronic equipment

We offer complete hospitality services to your guests, including:

- being met and greeted at the airport
- luggage transfer
- hotel room pre-registration
- transportation
- arranging leisure activities

While *Strategic Planning Group* plans events befitting Heads of State, it consistently operates within budget:

- by supplying timely and accurate cost forecasts with regular updates
- by leveraging our relationships with vendors to obtain the best prices

BUSINESS ADVOCACY -- EXECUTIVE INTELLIGENCE AND SUPPORT

Strategic Planning Group knows who to talk to and when. As former lead logistical coordinators and negotiators on State Visits and Presidential Trade Missions, in which high ranking government officials and some of the world's largest corporations negotiated multi-billion dollar deals, we built an unparalleled and actively-maintained global network of political and business contacts. Our strategic scheduling maximizes client productivity by setting appointments with the right government or corporate official.

Strategic Planning Group understands how important in-depth research and situational analyses are to successful negotiations. We supply intelligence regarding:

- a country's or area's economic status
- political and corporate leadership
- dominant internal and external issues
- the status of leading tenders and offers in your sector
- the composition of the business delegations from other countries, their schedules, accommodations and how and when meetings with various business people can be arranged

Whether domestically or internationally, *SPG* offers you the added advantage of "In the Field" support, providing you with the benefit of an on-site office. This includes:

- telephones, facsimile machines, computers, printers and copiers
- a message center
- a centralized working and meeting facility

We handle all logistical arrangements, including:

- airport greeting, luggage transfers, and transportation to pre-registered hotels rooms
- transportation during the entire visit
- staff that both accompanies and moves ahead of your officials, to ensure that the latest information is available and that all arrangements are set
- complete translation services

SPG will arrange all aspects of any size meeting, including:

- selection of an appropriate venue
- propriety of whether to host or have a “no host” meeting
- ensuring the invitees meet your strategic goals

GOVERNMENT AFFAIRS -- EXPERT CONSULTING

Strategic Planning Group's cache of political experience, key contacts at all levels of government, and knowledge of governmental policies and procedures, affords you unique and strategic positioning opportunities. Whether by arranging meetings with the right Administration officials, Congressional Members and Senior Staff, or by creating and managing issue-specific coalitions and grassroots campaigns, we effectively help you access the people and navigate the process to articulate your position to the appropriate players.

Success in the public policy arena demands a thorough understanding of the issues, expert planning, the formations of powerful strategic alliances and timely access to resources. No one knows that better than *Strategic Planning Group*. We integrate our experience in the legal and government communities to position your interests through:

- identifying, analyzing and tracking legislation and proposed regulations
- lobbying legislative and administrative officials
- conceiving, drafting and distributing testimony and position papers
- creating and managing issue-specific coalitions
- planning and managing grassroots campaigns
- devising and implementing public relations plans
- managing media response
- coordinating activities with other similarly interested parties
- public policy strategic development