

## SPO Newsletter

Volume 3, Issue 3  
FY25 Q3

*Our vision is to be the #1 state procurement office in the nation, where adding value is the norm and customer service is second to none.*

### Welcome, Renee and Louis

SPO Compliance is excited to introduce two new Deputy Assistant Director positions. Renee Uliassi has taken the position of Deputy AD: Operations and Contracts, overseeing the Operations, Cooperative, and Statewide Contracts teams. Louis Anaya has moved from his position as CPO of Arizona Department of Environmental Quality (ADEQ) to Deputy AD: Compliance and Agency Support, overseeing Compliance & Training, EPS, and ISA CPOs.

Renee is a steady leader and appreciates a collaborative decision-making approach. She brings 25+ years of large organization experience. As the Sr. Procurement Manager on the professional services team, prior to being a deputy AD, Renee has been the lead procurement officer on the State employee medical benefits and pharmacy solicitations. She successfully navigates critical decisions with the Benefit Services Division and has a logical approach. Her prior experience on team professional development and ability to make objective decisions serve as foundations in this new role.

Louis is a servant leader. He brings 20+ years of procurement experience with a strong foundation in implementing and operating the Arizona Management System. His agency experience will be a key component in fostering collaboration with our agency partners and supporting the Arizona Department of Public Safety (ADPS) and Department of Emergency and Military Affairs (DEMA) as they go

through transitional periods with their key roles in finance and procurement. He will also be directly assisting in backfilling his role at ADEQ.

These new Deputy Assistant Directors have a big task; the biggest is integrating into these new roles to support our team, and the ongoing implementation of FY25/FY26 strategic initiatives and key solicitations.

### Training Tracker

There is a new way to track your procurement training hours! SPO has released a Training Tracker form that can be found either attached to the [SPO Form 208 Sub Delegation](#) or independently under the [additional resources tab](#).

### APP Training

For upcoming APP training and instructions on registering for a course, please visit the [APP Support Training page](#).

If you have any questions or need assistance related to APP training opportunities, please contact Sullynna Mvula, APP training manager, at [sullynna.mvula@azdoa.gov](mailto:sullynna.mvula@azdoa.gov).

### Upcoming SPO Academy Training

Join us for upcoming procurement webinars and in-person trainings. These sessions are designed to enhance your skills and efficiency in procurement, making your work more streamlined and effective.

**Basics of IT Procurement** - 4/17/2025

**Procurement Basics** - 5/14/2025

**Basic Risk Training** - 5/15/2025

**Request for Proposal Series** - 5/20 - 5/22/2025

**10K Delegation** - CBT AD10KDEL

**100K Delegation** - coming soon as a CBT

To find additional upcoming SPO Academy Sessions, please follow the link below.

**FIND OUT MORE  
ABOUT TRAINING**

If you have any questions or suggestions for additional or future training, please contact John Jimenez, chief learning officer, at [john.jimenez@azdoa.gov](mailto:john.jimenez@azdoa.gov) or Sullynna Mvula, APP training manager, at [sullynna.mvula@azdoa.gov](mailto:sullynna.mvula@azdoa.gov). Recordings of past trainings can also be requested.

## Important

Please note that users are required to attend SPO training courses in their entirety. AI summaries are not an adequate substitute for the training, as they may not capture all the objectives and takeaways from the training. Therefore, AI summaries will not be provided, and users will not receive credit for a course they did not attend. Thank you for your understanding and cooperation.

## Updated Resources

The following documents were substantially updated. The new versions of these documents are on the [SPO for Agencies website](#):

Posted on the [Standard Forms and Documents section](#):

- [SPO Form 208 - Procurement Authority Sub-Delegation Report](#) (Revised with training log 1/19/2025)

- [E301 Sole Source \(SS\) Notification](#)
- [E301 Sole Source Notification Template](#)

## Sole Source Notification

Compliance has received an increase in questions related to sole source determinations.

When submitting a sole source determination, we ask for the 3-working-day publication notice to be published before submitting the determination request. Information on the publication is requested in Fields 14 and 15 of the SPO Form 103. This may be a change in the process from a few years ago, necessitated by this step frequently being overlooked.

14. Describe the procurement process, efforts to locate other sources/evidence of one source, and determination that the price is fair and reasonable. Include the sole source notice and number (BPM00XXXX) and attach a copy to the determination.

15. A notice was posted in the State's eProcurement system to registered vendors with an invite to comment on the sole-source request for three (3) working days, and it was determined that no reasonable alternative source exists for the procurement need. A copy of the notice is attached.

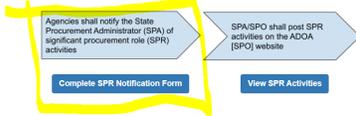
Including this information in your determination provides the additional benefit of providing a clear paper trail in your procurement process so if or when your contract is audited or reviewed by the public, compliance to the publication requirement can easily be verified as the solicitation number and notice is provided in the documentation.

Additionally, while compliance does not collect PDS in order to route a sole source determination for approval, we would like to provide a reminder that any procurement actions exceeding \$10,000 are subject to the Significant Procurement Role requirements in the APC and SPO Forms 120/130 are required to be collected from all individuals serving in a SPR capacity who does not currently have an annual PDS (SPO Form 110) on file with the agency. The notice of first date of signature is also required to be reported to the SPA using the Google form found [here](#).

This would also be applicable to CIs and NPTQs, and also to Emergency procurements as soon as feasible based on the emergency.

## Significant Procurement Role (SPR) Notification

accordance with A.R.S. § 41-753(D) and guidance from Standard Procedure 003 - Significant Procurement Role (SP 003), the following are to be completed:



I would also like to provide a reminder that if the agency is seeking a CI, please refrain from the use of "sole source" in the justification. Using these terms interchangeably creates confusion and can blur the lines between these two distinct and separate processes, which are governed by different statutes and rules. If the agency is pursuing a CI, it is because competition exists in the market and other suppliers are capable of completing the work, but competition is not possible (practicable) at the time of the determination due to the circumstances described in the determination.

Comparably, a sole source determination is used when there are no other possible suppliers in the market. The notification period to suppliers is not a bidding period, but allows for other registered suppliers to dispute that the named supplier is the only one that can do the work and that there is in fact, competition available. If a dissenting supplier responds within the notification period and additional suppliers are found to be available on the market, then a competitive solicitation would be required to allow for bids/proposals on the requested scope of work.

In the spirit of continuous improvement and to provide additional resources and tools for procurement officers, SPO Compliance has created a sole source notification template and standard work that is now available on the SPO intranet page. An official SPO Alert will be forthcoming in a few weeks after it has been tested and reviewed by additional procurement officers. So, if you need a template to use for this process, please review the provided standard work and template and provide feedback to SPO Compliance on the effectiveness and usability of the provided tools. The sole source notification

template and standard work can be found under "[Standard Forms and Documents](#)," "Solicitations and Contract Templates," in the folder labeled "Sole Source."

### SOLICITATION AND CONTRACT TEMPLATES (Updated 4/23/2024)

Includes templates for Request for Quotation (RFQ), Request for Proposal (RFP), Request for Information (RFI), and Direct Contracts (e.g. Participating Addendum).

#### Notes:

- These templates were created for SPO use. Agencies may use these templates but are not required to do so.
- **Red text** – Content within the file document requires modification to provide specificity and clarity.
- **Black text/yellow highlight** – Content within the file document that is customizable that may be applicable or optional.

[Click here to download files](#)

Name ↑

- Direct Contracts
- RFI
- RFP
- RFQ
- Sole Source**

## Compliance Hotline

If agency-level resolution fails for a procurement issue under SPO Compliance's jurisdiction (state procurement law, policy, ethics, or contracts), use the Compliance Hotline. Anonymous reporting is available, but limits follow-up and resolution updates.

**COMPLIANCE HOTLINE**

As always, we are here to help. If you have any questions, please reach out to [SPOCompliance@azdoa.gov](mailto:SPOCompliance@azdoa.gov).

## Join Us!



SPO has bi-weekly **Strategic Initiative Update Meetings** on the first Wednesday of the month from 1-2 p.m.

To attend these meetings, reach out to

David Strayer, [David.Strayer@azdoa.gov](mailto:David.Strayer@azdoa.gov), to be added.